

Research Briefing

7 November 2023

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# Tourism: Statistics and policy



## Summary

- 1 Inbound tourism
- 2 Outbound tourism
- 3 Domestic tourism
- 4 Tourism and the UK economy
- 5 Recent issues affecting tourism
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- 7 Structure of the “tourism landscape”

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## Summary

UK tourism fell sharply due to the pandemic, though data indicates domestic tourism has largely recovered, and VisitBritain expects inbound tourism to recover by the end of 2024.

In 2019, the sector accounted for £74 billion of economic output with domestic spending being higher than spending by overseas visitors. While inbound trips are skewed towards London, domestic trips are more spread throughout the country.

The sector was heavily supported by Government funding during the pandemic but remains fragile. It continues to be affected by issues stemming from Brexit and the increased cost of living. The industry has said that recent Government policies to increase border security have negatively affected inbound tourism.

## Overseas tourism

In 2022 overseas residents made 31.2 million visits to the UK, down from the 40.9 million visits in 2019. They spent, in cash terms, £26.5 billion, down from £28.5 billion in 2019.

The most recent international data for the first quarter of 2023 shows the fall in inbound visitor numbers is in line with the average fall across Europe.

Numbers from North America have recovered, while numbers from Europe and the rest of the world are still considerably below 2019 levels.

Over half of visitors to the UK visit London and compared to the pre-pandemic figures, are more likely to be visiting family and friends and taking longer trips (averaging 8.4 nights in 2022 compared to 7.1 nights in 2019).

The number of trips taken by UK residents abroad is also down, at 71.0 million in 2022 compared to 93.2 million in 2019. UK residents spent £58.5 billion abroad in 2022.

UK residents take more trips overseas than overseas residents do to the UK. They also spend, on average, longer abroad per trip, and are more likely to be travelling for a holiday than another reason.

## Domestic tourism

In 2022, British residents made 126 million overnight visits within Great Britain, for a total of 383 million nights, and spent £32.9 billion (data for Northern Ireland is not available).

They also made 1.1 billion tourism day visits, spending £45 billion. As such, domestic tourism spending is more valuable than inbound spending.

Domestic tourism is also far more spread out throughout the country, and less focused on London.

## Economic impact

In 2019, tourism was estimated to account for £74 billion (3.6%) of economic output. By comparison the EU average was 4.5%.

Tourism was estimated to directly account for the employment of 1.7 million UK workers in 2019, 5.3% of all workers.

## Recent issues and Government policy

While the industry continues to recover from Covid-19, and was supported by Government funding during the pandemic, the sector is more fragile than in 2019, with businesses having taken on more debt.

Energy price inflation has also disproportionately affected hospitality businesses, and staff shortages have been a concern following the end of freedom of movement with the EU. Both of these pressures eased somewhat between 2022 and 2023.

Brexit has had various other impacts on foreign travel. The pound has lost value against the euro and dollar since 2016, some of which could be attributed to Brexit, making the UK a more attractive place to holiday for both international and domestic tourists.

However, the Government has ended VAT-free shopping, removed European ID cards as sufficient ID to enter the UK, and is implementing an electronic travel authorisation for visitors who do not require a visa. All of these are seen as barriers to inbound tourism.

Other key Government policies on tourism include the Tourism Recovery Plan (for England) which aims for inbound tourism to have recovered by the end of 2024, among other things, and a reorganisation of destination management organisations, which market and promote tourism at a local level.

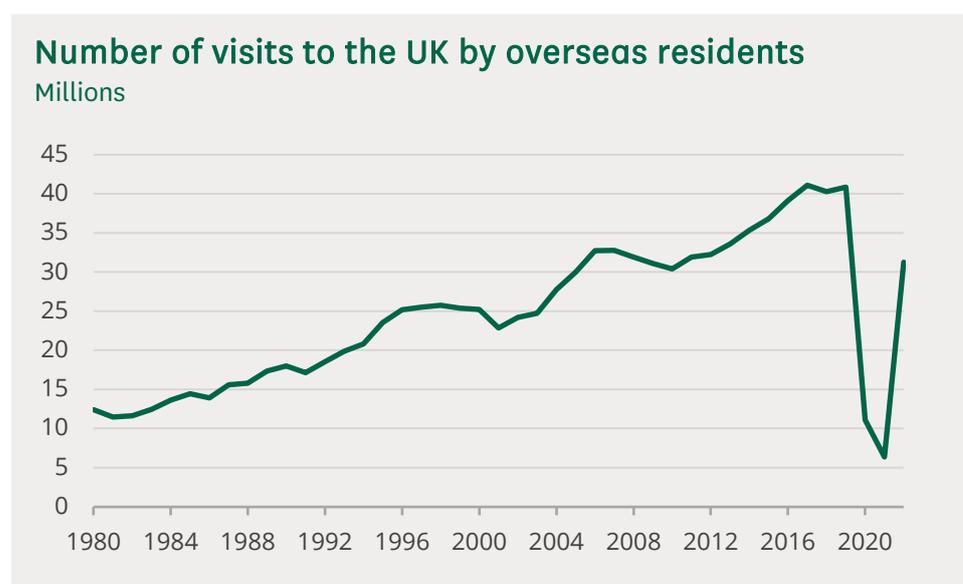
# 1 Inbound tourism

## 1.1 Number of visits

Overseas residents made 31.2 million visits to the UK in 2022.<sup>1</sup> This is up from the levels seen in 2021 and 2020 which were greatly impacted by restrictions on international travel during the Covid-19 pandemic.

While the figure is about 10 million lower than the 40.9 million visits made in 2019, more recent quarterly data shows 9.6 million visits in the last quarter of 2022, only slightly down from the same quarter in 2018 (9.7 million) and 2019 (10.3 million).<sup>2</sup>

The Office for National Statistics publishes data going back to 1980 when 12.4 million overseas residents visited the UK. This passed 20 million in 1994, 30 million in 2006 and peaked at 41.1 million in 2017.<sup>3</sup>



Source: ONS, [Travel trends estimates: overseas residents in the UK and UK residents abroad](#), table 1.01

Notes: Data for 2020 and 2021 should be treated with caution. Disruption to data collection means figures for 2020 are modelled, and for 2021 are based on a smaller-than-usual survey sample

<sup>1</sup> All data in this section is from the ONS's [Travel trends estimates: overseas residents in the UK](#) data release, published 26 May 2023, unless otherwise specified.

<sup>2</sup> As above, table 2.01

<sup>3</sup> ONS, [Travel trends estimates: overseas residents in the UK and UK residents abroad](#), 26 May 2023, table 1.01

## 1 Data collection and definitions

The data on visitor numbers is collected using the International Passenger Survey which surveys travellers at major air, sea and tunnel ports in the UK.<sup>4</sup>

The survey did not run between March 2020 and January 2021, and data collection was disrupted at various locations until July 2022. As such, recent data, especially for 2021, should be treated with caution.

The survey is used to estimate the **number of visits** to the UK, which is not the same as the number of visitors, as someone visiting the UK more than once in a given year is counted on each visit.

Visits are mainly overnight but include some day visits. However, **day visits to or from Ireland** across the land border are not included.<sup>5</sup>

An **overseas visitor** is someone who, being permanently resident in another country, visits the UK for a period of less than 12 months. As such it is not intended to cover people who travel to the UK to work indefinitely or for a period longer than a year.

## International comparisons

Between the mid-1990s and 2019, though the number of overseas visitors to the UK increased, the UK's share of global inbound arrivals decreased.<sup>6</sup>

Post-pandemic, overseas visitor numbers to the UK were 24% lower in 2022 than in 2019, outperforming the global drop of 34%, but underperforming the 19% drop in Europe over the same time period.<sup>7</sup>

However, data from the first quarter of 2023 is more positive, with visitor numbers down 8% compared to the same period in 2019, similar to the 9% fall across Europe.

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<sup>4</sup> ONS, [Travel trends: 2022](#), 26 May 2023

<sup>5</sup> ONS, [International Passenger Survey methodological information](#), 24 March 2017

<sup>6</sup> Department for Digital, Culture, Media & Sport, [The de Bois review: an independent review of Destination Management Organisations in England](#) (pdf), p57, August 2021

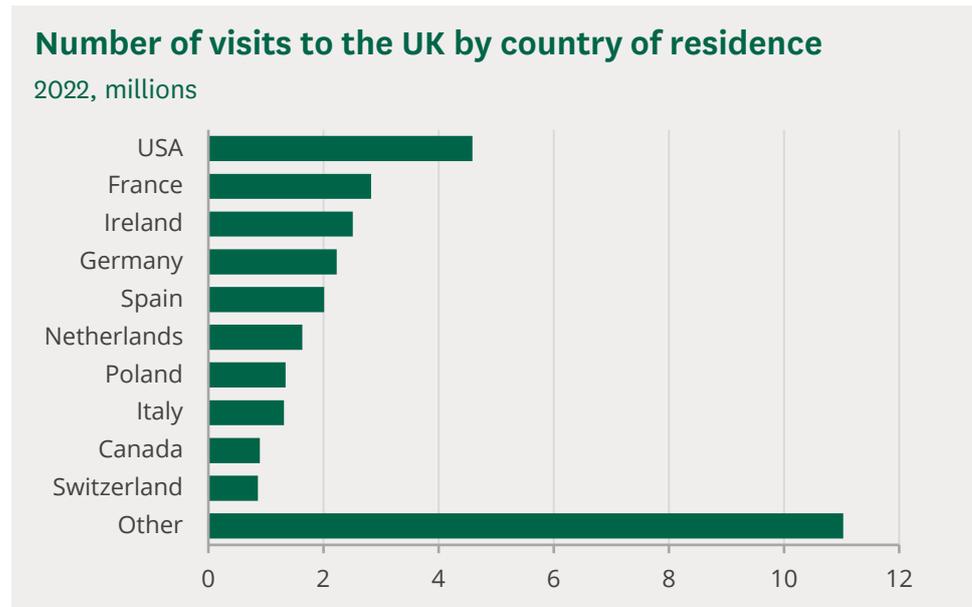
<sup>7</sup> UNWTO, [International tourism and Covid-19 dashboard](#) (accessed 17 October 2023)

## 1.2

## Origin of visitors

Of the 31.2 million overseas visitors in 2022, 21.0 million were from Europe, 5.5 million from North America, and 4.8 million from other countries.<sup>8</sup>

Breaking this down further, the top three countries of residence for visitors to the UK were the USA (4.6 million visits), France (2.8 million) visits and Ireland (2.5 million).



Source: ONS, [Travel trends estimates: overseas residents in the UK](#), table 2.08

While the number of North American visitors has returned to pre-pandemic levels, the number of European visitors was down by over 6 million and the number from other countries down almost 3.5 million in 2022 compared to 2019.

Around 1 million residents of mainland China visited the UK in 2019, but in 2022 this was less than 100,000, owing to the country's strict restrictions on foreign travel. China did not resume direct passenger flights to the UK until August 2023.<sup>9</sup>

Other notable decreases include the number of visitors from Germany (down 1 million or 31%), Italy (down 900,000 or 40%) and France (down 700,000 or 21%).

<sup>8</sup> ONS, [Travel trends estimates: overseas residents in the UK](#), table 2.02

<sup>9</sup> Reuters, "[China, UK agree to resume direct passenger flights – British embassy](#)", 10 August 2022

## 1.3 Length of visit

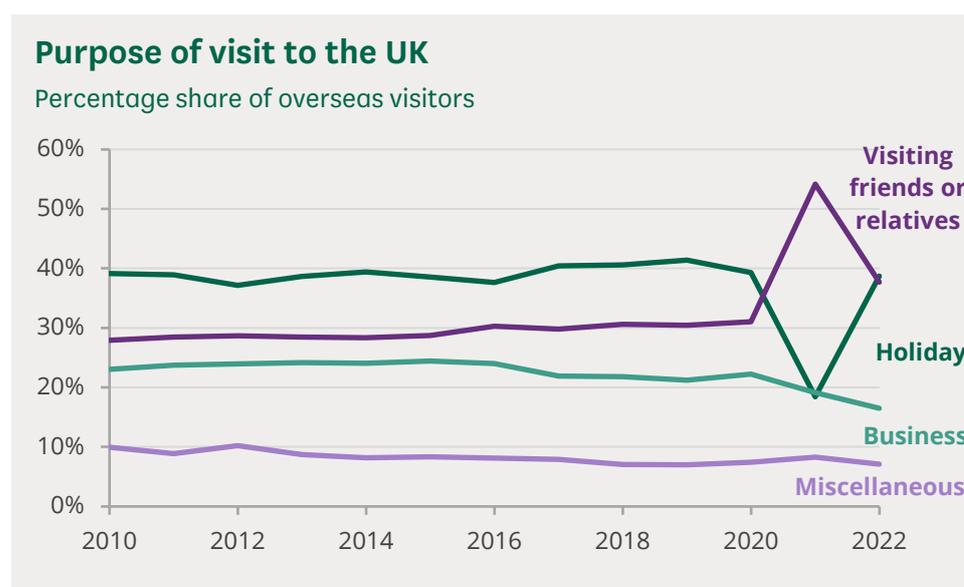
Overseas visitors spent around 263 million nights in the UK in 2022, down on 290 million in 2019. However, the figure for the final quarter (72 million) was up on the same quarter in 2018 (63 million) and 2019 (67 million).<sup>10 11</sup>

The average length of visit was 8.4 nights in 2022, up from 7.1 in 2019 and 7.2 in 2018.

European visitors spent on average the least time visiting the UK at 6.1 nights, followed by North Americans (8.9 nights) and visitors from the rest of the world (17.9 nights).<sup>12</sup>

## 1.4 Reasons for visiting

In 2022, 39% of overseas visitors came to the UK for a holiday, 38% to visit friends or relatives, 16% for business and 7% for other reasons.<sup>13</sup>



Source: ONS, [Travel trends estimates: overseas residents in the UK and UK residents abroad](#), table 1.03

Notes: Data for 2020 and 2021 should be treated with caution. Disruption to data collection means figures for 2020 are modelled, and for 2021 are based on a smaller-than-usual survey sample

In 2022, visitors were more likely than in 2019 to be visiting friends and family, and less likely to be visiting for business. In 2021 these differences were even

<sup>10</sup> ONS, [Travel trends estimates: overseas residents in the UK](#), table 2.01

<sup>11</sup> On 13.11.2023 the figures in this paragraph were corrected from previously been reported in thousands instead of millions.

<sup>12</sup> As above, table 2.04

<sup>13</sup> As above, table 2.02

greater with 54% of overseas visitors coming to the UK to see friends and family.

Those visiting family and friends tend to spend more time in the UK (11.1 nights on average in 2022) than those visiting for a holiday (6.2 nights) or business (4.6 nights).<sup>14</sup>

While the number of visitors in 2022 was considerably lower than the number in 2019, the number of nights spent in the UK by overseas visitors was more similar. This is somewhat explained by the fact that visitors in 2022 were more likely to be travelling to visit family and friends, and people visiting family and friends spend, on average, the longest in the UK.

Residents from North America are more likely to visit the UK for a holiday (46%) than residents from Europe or the rest of the world (37%).<sup>15</sup> Residents from Europe are the most likely to visit for business (19%) and residents from the rest of the world the most likely to visit friends and family (45%).

## 1.5 Destinations

Over 16 million overnight visits were made to London in 2022, accounting for over half (52%) of all visits; 13 million were made to other parts of England, 3 million to Scotland and 700,000 to Wales. Data for Northern Ireland was not published.<sup>16</sup>

These figures add up to more than the 31.2 million total visits, as a visit may involve overnight stays in more than one region.

After London, the most popular cities for overnight stays were Edinburgh (1.8 million visits), Manchester (1.2 million) and Birmingham (800,000).<sup>17</sup>

This is the number of overnight stays to these locations and not the number of visits, as a tourist may take a day trip to, say, Birmingham while staying overnight in London or vice-versa.

## 1.6 Spending

Overseas visitors spent £26.5 billion in the UK in 2022, down on £28.5 billion in 2019 and similar to the amount spent in 2018 (£26.5 billion).<sup>18</sup> These figures

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<sup>14</sup> As above, table 2.04

<sup>15</sup> As above, table 2.02

<sup>16</sup> As above, table 2.16

<sup>17</sup> ONS, [Travel Trends: 2022](#), 26 May 2023

<sup>18</sup> ONS, [Travel trends estimates: overseas residents in the UK](#), table 2.01

are in cash terms and are not adjusted to take into account inflation. They do not include spending on travel to and from the UK.<sup>19</sup>

After inflation is taken into effect, spending in 2022 was around 18% lower than in 2019.<sup>20</sup>

Of this total, £6.9 billion was spent by North American visitors, £11.7 billion by European visitors and £7.9 billion by visitors from the rest of the world.<sup>21</sup>

Visitors from the rest of the world spent on average the most per visit at £1,650 followed by North Americans at £1,250 and Europeans at £550, though this is in part a reflection of the average length of stay for each of these groups.

Per day, Europeans and visitors from the rest of the world spent similar amounts (£90 and £92 respectively) while North Americans spent £141 per day.

People visiting for business spent the most per day (£209) followed by holidaymakers (£153) while those visiting friends and family spent £58 per day.

Visitors from mainland China and the Middle East (other than the UAE) spent on average the most per trip at £3,000 and £2,900 respectively.<sup>22</sup>

These figures are somewhat affected by the very small number of Chinese tourists in 2022, but visitors from these areas also spent the most per visit pre-pandemic. In 2019, mainland Chinese visitors spent an average of £1,900 per visit and Middle Eastern (other than the UAE) visitors spent £2,500 per trip.

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<sup>19</sup> ONS, [International Passenger Survey methodological information](#), 24 March 2017

<sup>20</sup> Commons Library calculations, using ONS foreign tourist expenditure implied deflator series [GDPB](#)

<sup>21</sup> ONS, [Travel trends estimates: overseas residents in the UK](#), table 2.03

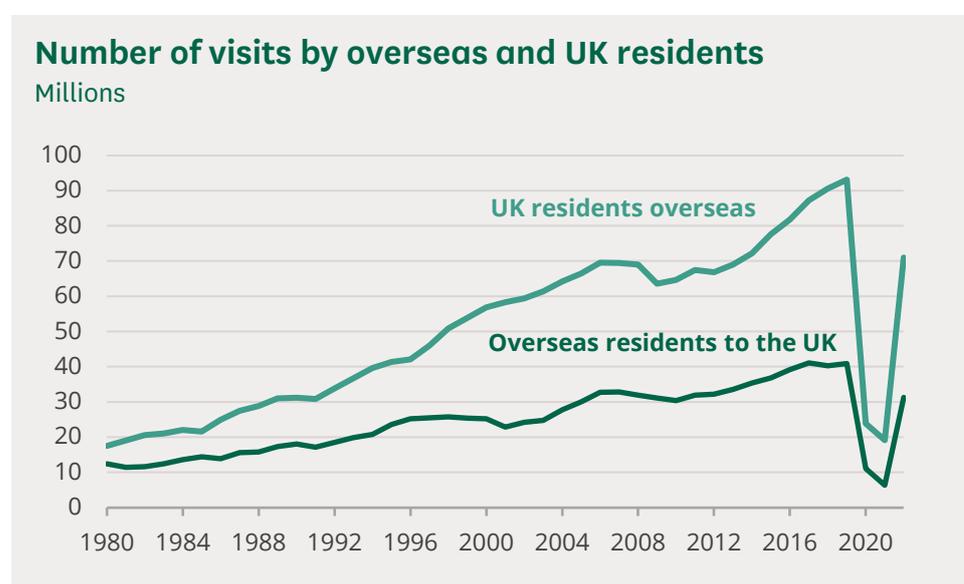
<sup>22</sup> As above, table 2.09

## 2 Outbound tourism

### 2.1 Number of visits

UK residents made 71.0 million trips abroad in 2022, up on the levels seen during 2020 and 2021 but down on the 93.1 million made in 2019.<sup>23</sup>

The number of visits made in the latest data (the last quarter of 2022) was also down on the same quarter in 2019 (16.0 million compared to 19.2 million).



Source: ONS, [Travel trends estimates: overseas residents in the UK and UK residents abroad](#), table 1.01

Notes: Data for 2020 and 2021 should be treated with caution. Disruption to data collection means figures for 2020 are modelled, and for 2021 are based on a smaller-than-usual survey sample

The Office for National Statistics publishes data going back to 1980 when 17.5 million UK residents travelled abroad. This figure has steadily grown, with some exceptions, most notably the late 2000s economic downturn which saw visits abroad drop from 69.5 million in 2007 to 63.5 million in 2009.

<sup>23</sup> All data in this section is from the ONS's [Travel trends estimates: UK residents' visits abroad](#) data release, published 26 May 2023, unless otherwise specified.

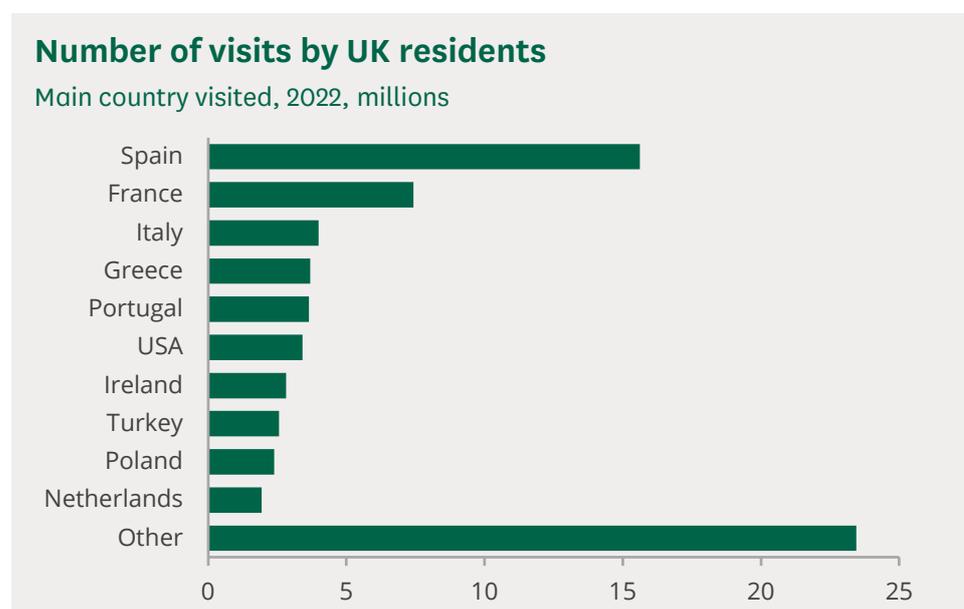
## 2.2

## Destinations

Of the 71.0 million trips abroad in 2022, 56.1 million (79%) were to Europe, 4.0 million (6%) to North America, and 10.9 million (15%) to other countries.<sup>24</sup>

The proportion of UK residents travelling to each of these regions is broadly similar to that in 2019.

Spain is by far the most popular country among UK residents, accounting for 15.6 million visits in 2022. This is followed by France (7.4 million) and then a cluster of countries attracting between 3.4 million and 4.0 million visits (Italy, Greece, Portugal and the USA).<sup>25</sup>



Source: ONS, [Travel trends estimates: UK residents' visits abroad](#), table 3.08

While most countries saw visitor numbers from the UK fall between 2019 and 2022, visitor numbers increased to Portugal (up 330,000), Turkey (up 270,000) and Greece (up 250,000).

The countries which saw the biggest falls in UK resident visitor numbers were France (down 2.9 million), Spain (down 2.5 million) and Ireland (down 2.0 million).

<sup>24</sup> As above, table 3.02

<sup>25</sup> As above, table 3.08

## 2.3 Length of visits

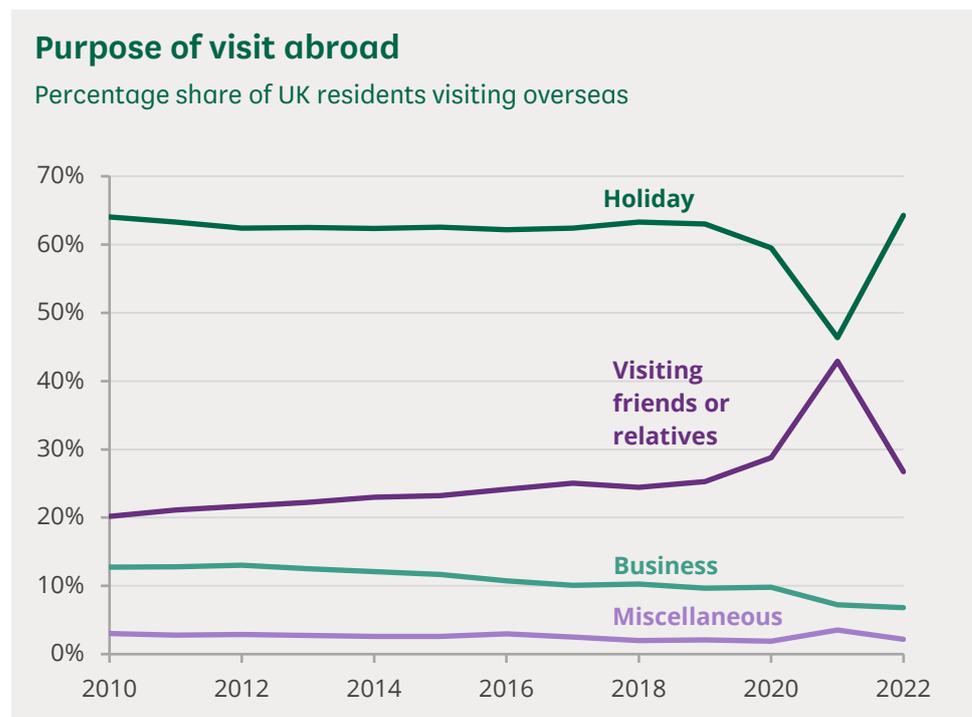
UK visitors spent around 780 million nights abroad in 2022, also down on the 900 million in 2019.<sup>26 27</sup>

The average length of visit was 11 nights in 2022, up from 9.7 in 2019 and 9.9 in 2018.

The average visit to Europe was 8.8 nights followed by North America at 14.1 nights and the rest of the world at 21.3 nights.

## 2.4 Reasons for visiting

In 2022 64% of UK residents went abroad for a holiday, 27% to visit friends or relatives, 7% for business and 2% for other reasons.<sup>28</sup>



Source: ONS, [Travel trends estimates: overseas residents in the UK and UK residents abroad](#), table 1.04

Notes: Data for 2020 and 2021 should be treated with caution. Disruption to data collection means figures for 2020 are modelled, and for 2021 are based on a smaller-than-usual survey sample

The proportion travelling to visit friends or relatives in 2022 (27%) is similar to the proportion in 2019 (25%). By comparison, the proportion of overseas

<sup>26</sup> As above, table 3.04

<sup>27</sup> On 13.11.2023 the figures in this paragraph were corrected from previously been reported in thousands instead of millions.

<sup>28</sup> As above, table 3.02

visitors coming to the UK to see friends and relatives increased from 30% of all trips in 2019 to 38% in 2022.

Compared to overseas visitors coming to the UK, UK residents going abroad are more likely to be going for a holiday, and less likely to be visiting friends or relatives or travelling for business.

UK residents visiting family and friends tend to spend more time abroad (17.1 nights on average in 2022) than those visiting for a holiday (8.7 nights) or business (6.9 nights).<sup>29</sup>

All these figures are higher than the comparable figures for overseas residents visiting the UK. UK residents not only make more trips abroad than overseas residents travel to the UK, they also spend longer abroad, whatever the reason.

## 2.5

## Spending

UK residents spent £58.5 billion on trips abroad in 2022, down on the £62.3 billion spent in 2019.<sup>30</sup> These figures are in cash terms and are not adjusted to take into account inflation. They do not include spending on travel to and from overseas.<sup>31 32</sup>

Of this total, £6.0 billion was spent on trips to North America, £38.2 billion on trips to Europe and £14.3 billion on trips to the rest of the world.

Per day, UK visitors to North America spent the most (£108), followed by visitors to Europe (£77) and the rest of the world (£62).<sup>33</sup> All these figures are lower than the equivalent figures on overseas resident spending in the UK, meaning that, per day, UK residents spend less abroad than overseas residents spend on trips in the UK.

People visiting for business spent the most per day (£156) followed by holidaymakers (£100) while those visiting friends and family spent £35 per day.

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<sup>29</sup> As above, table 3.04

<sup>30</sup> As above, table 3.03

<sup>31</sup> ONS, [International Passenger Survey methodological information](#), 24 March 2017

<sup>32</sup> On 13.11.2023 the figures in this paragraph were corrected from previously been reported in millions instead of billions.

<sup>33</sup> ONS, [Travel trends estimates: UK residents' visits abroad](#), table 3.05, 26 May 2023

## 3 Domestic tourism

### 2 Definitions

Data on domestic tourism is collected using the Great Britain Tourism Survey.

A domestic overnight trip is counted if it involves a stay of at least one night in Great Britain, and the trip is not taken on a frequent basis.

Prior to 2021, all overnight trips away from home, irrespective of regularity, were counted, meaning recent data is not comparable to pre-pandemic data.<sup>34</sup>

A domestic day trip is defined most widely as a day trip for at least three hours for leisure reasons, though the standard definition used by VisitBritain is that of a tourism day trip, which involves an irregular leisure trip usually to a different local authority.

As with overnight visits, the definition of a day visit was changed in 2021, notably including children in the figures.<sup>35</sup>

### 3.1 Overnight visits

In 2022, British residents made 126 million overnight visits within Great Britain, for a total of 383 million nights, and spent £32.9 billion. This is higher than spending by international tourists in the same year (£26.5 billion).<sup>36</sup>

Of these 126 million visits, England registered 107 million trips, Scotland 13 million and Wales 9 million (the numbers sum to more than 126 million as a trip may have included visits to more than one part of Great Britain).

The average spending per trip and night in England and Scotland was quite similar, with spending in Wales being slightly lower (£220 in total and £74 per night compared to the national averages of £262 in total and £86 per night).

<sup>34</sup> BMG, [Great Britain Tourism Survey 2021 Background Quality Report](#), p43

<sup>35</sup> BMG, [Great Britain Day Visits Survey 2022 Background Quality Report](#), 25 May 2023, p34

<sup>36</sup> VisitBritain, [Great Britain Tourism Survey 2021 and 2022 Detailed Overview](#)

Visiting family and friends accounted for 36% of trips, followed by holidays (34%), miscellaneous reasons (25%) and business (6%).

## Comparisons over time

The survey used to collect data on domestic tourism changed in 2021 meaning data from 2022 is not comparable to data prior to April 2021.

The comparable data we do have shows that between April-December 2021 and the same period in 2022, the number of trips increased by 16%, spending increased by 35% (in cash terms) and the number of nights spent increased by 2%.

This suggests a continued post-pandemic recovery and a shift away from relatively long and low-spend trips.

## Regional destinations

### England

In contrast to international visits, domestic overnight visits to England are much more spread out throughout the country.

Of the 107 million visits in England, 18 million (16%) were to the South West, 16 million (15%) to the South East, and 15 million (14%) each to London and the North West.

London did account for the most spending (£5.1 billion or 18%), followed by the South West (£5.0 billion or 18%) and the North West (£4.2 billion or 15%).

Domestic overnight visits and spending by region		
2022		
Region	Visits (millions)	Spend (£millions)
Great Britain	125.7	£32,882
England	106.9	£27,554
London	15.4	£5,087
North East	3.8	£932
North West	14.7	£4,187
Yorkshire and the Humber	10.1	£2,535
West Midlands	8.4	£1,679
East Midlands	8.5	£1,932
East of England	10.4	£2,294
South West	17.6	£4,983
South East	15.8	£3,521
Other/unspecified England	2.0	£403
Scotland	13.5	£3,410
North of Scotland	2.9	£783
East of Scotland	4.1	£1,079
South of Scotland	0.7	£160
West of Scotland	4.4	£1,172
Wales	8.7	£1,919
South East Wales	2.7	£556
North Wales	2.3	£571
South West Wales	1.8	£440
Mid Wales	0.8	£110

Source: Great Britain Tourism Survey results for [England](#), [Scotland](#) and [Wales](#)

Note: Visits and visitor spend is allocated based on the main region visited, though more than one region may have been visited on a single trip.

## Wales

South East Wales was the most popular destination in Wales attracting 2.7 million trips in 2022, followed by North Wales (2.3 million), South West Wales (1.8 million) and Mid Wales (0.8 million).<sup>37</sup>

Visitors to Wales were more likely to visit a rural location than the GB average. Over half visited a small town, village or the countryside, around 21% visited a coastal location, and 29% a large city or town.

Of the 9 million trips taken in Wales, 6.2 million (71%) were taken by English residents, 2.2 million (25%) by Welsh residents and the remainder by Scottish residents.

<sup>37</sup> Welsh Government, [Domestic GB tourism statistics \(overnight trips in Wales\): 2022](#), 12 September 2023

Overnight visitors to Wales are likely to be younger than the national average, with around half of visitors aged 16 or over being under the age of 35.

### Scotland

Over half of trips in Scotland were to cities and large towns in Scotland.<sup>38</sup> 36% were to the West of Scotland (including Glasgow), 34% were to the East of Scotland (including Edinburgh), 24% to the North of Scotland and 6% to the South of Scotland.

These figures reflect the main region visited, as visitors may have travelled to more than one region.

Around half of overnight trips taken in Scotland were taken by people resident in Scotland. Just under half were from England and 1% from Wales.

### Northern Ireland

The Great Britain Visitor Survey does not cover Northern Ireland.

Prior to the pandemic, the Northern Ireland Research and Statistics Agency published its own data on domestic overnight tourism, but this hasn't been available since 2019.

In 2019:

- Residents of Great Britain made 1.5 million trips to Northern Ireland, spending £370 million.<sup>39</sup>
- Northern Irish residents made 2.3 million overnight trips within Northern Ireland, spending £310 million.<sup>40</sup>
- Northern Irish residents made 1.1 million trips to Great Britain.

## 3.2

### Day visits

VisitBritain collects data on three types of day visit: leisure visits (the widest measure), of which some are tourism day visits (the standard measure), of which some are day visits for activities “core to tourism” (the narrowest measure).

In 2022, British residents made:

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<sup>38</sup> VisitScotland, [Great Britain Tourism Survey 2022](#)

<sup>39</sup> Northern Ireland Statistics and Research Agency, [External Overnight Trips to Northern Ireland 2019](#), 22 October 2020

<sup>40</sup> Northern Ireland Statistics and Research Agency, [Northern Ireland domestic overnight trips 2019](#), 22 October 2020

- 2.8 billion leisure visits, spending £95 billion, of which
- 1.1 billion were tourism day visits, with spending of £45 billion, of which
- 370 million were day trips for activities “core to tourism”, with spending of £14 billion.<sup>41</sup>

A leisure visit was defined as being a day visit of at least three hours, including travel time, for leisure reasons. These reasons included things like visiting friends and family, going to a visitor attraction, or going to a restaurant.

A tourism day visit was defined as a leisure visit with two additional criteria:

- The trip was not a regular trip, in that it is undertaken less than once a week.
- It included a visit to a place outside the local authority where the trip started (though this criteria didn’t apply for trips to visitor attractions, attending a public event or watching live sport).

A day visit for activities “core to tourism” was defined as tourism day visits, where the visitor did one of these things as their main activity:

- Went to a visitor attraction
- Went sightseeing
- Went to a spa/received health or beauty treatments
- Went to a retreat
- Attended an organised public event (for example, an exhibition or concert)
- Visited an art gallery or museum
- Went to a cultural centre
- Watched live sport

Spending on tourism day visits (£45.0 billion) was, in total, higher than spending on domestic overnight visits (£32.9 billion), which in turn was higher than spending by overseas tourists in the UK (£26.5 billion). The average spend per tourism day trip was £41 per person.

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<sup>41</sup> VisitBritain, [Great Britain Day Visitor Survey 2021 and 2022 Detailed Overview](#)

Of the 1.1 billion trips, England registered 950 million trips, Scotland 95 million and Wales 62 million. This is broadly in line with the population shares of these three parts of Great Britain.<sup>42</sup> Data is not available for Northern Ireland.

Visiting family and friends was the most popular main activity accounting for 29% of tourism day trips, followed by going to a visitor attraction (16%) and for food, drink, a night out or specialty shopping (14%).<sup>43</sup>

## Comparisons over time

The survey used to collect data on domestic tourism changed in 2021 meaning data from 2022 is not comparable to data prior to April 2021.

The comparable data we do have shows that between April-December 2021 and the same period in 2022, the number of trips increased by 42% and spending increased by 46% (in cash terms).

More recent quarterly data for 2023 shows further recovery.<sup>44</sup>

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<sup>42</sup> ONS, [Population estimates](#). (accessed 24 October 2023)

<sup>43</sup> VisitBritain, [Great Britain Day Visitor Survey 2021 and 2022 Detailed Overview](#)

<sup>44</sup> VisitBritain, [Great Britain domestic day trips: latest results](#), 3 October 2023

## 4 Tourism and the UK economy

### 3 Calculating the economic impact of the tourism industry

The contribution of tourism to the economy is not straightforward to calculate. Several industries provide services to tourists, including the accommodation services industry, the food and beverage services industry, and the museums and galleries industry. However, these industries might provide services to local people as well as tourists – for example, a country pub or a museum may serve local people as well as tourists.

These issues are addressed by the ONS which disentangles the total contribution of tourism related industries from the direct contribution made by tourism. The [Tourism Satellite Account](#) (TSA) publishes estimates of economic output related to tourism on this basis.

### 4.1 Economic output

The ONS has published data on the role of tourism (comprising both domestic and inbound tourism) in the economy up to the year 2020 in its [Tourism Satellite Account](#).<sup>45</sup> However, given the effect of the pandemic on tourism, we present 2019 data as a better reflection of the baseline role of tourism in the UK economy.

In 2019, the economic output of tourism-related industries was estimated at £134 billion, of which £74 billion was estimated to be directly generated by tourism. These figures are equivalent to 6.6% and 3.6% of the whole economy respectively.

The difference between these figures reflects that tourism-related industries will serve non-tourists as well as tourists (see box 3).

The measure of economic output used here is gross value added (GVA) which is like gross domestic product, or GDP. GVA measures the value of products

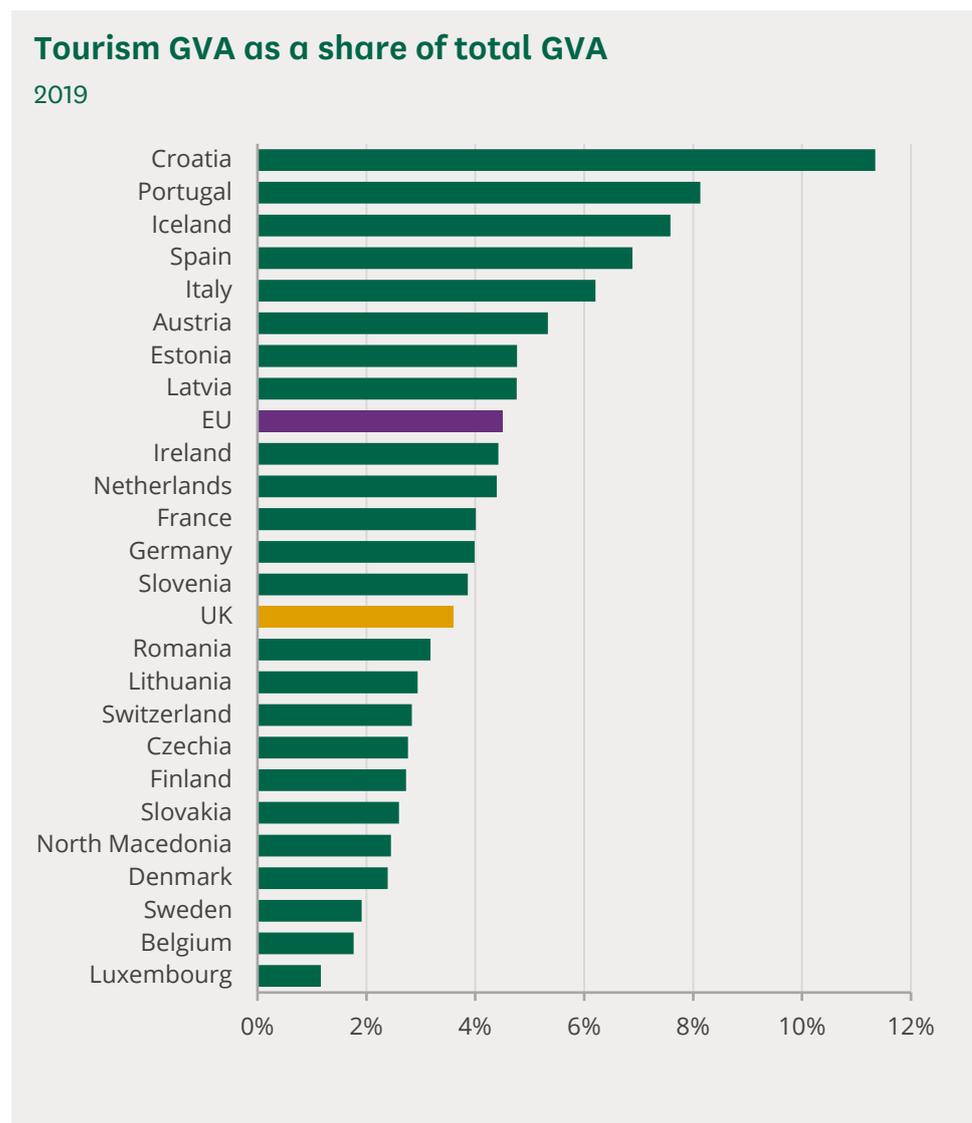
<sup>45</sup> ONS, [The UK Tourism Satellite Account](#), tables 5 and TDGVA, 24 February 2023

and services produced minus the costs incurred in production, though not including labour costs.

Of this £74 billion, the provision of accommodation services to tourists contributed £13.5 billion to the economy, food and drink services contributed £9.0 billion, and travel agencies and other reservation services £6.9 billion.

## International comparisons

The European Commission publishes estimates of tourism GVA as a share of total GVA for most member states and some non-members.<sup>46</sup>



Source: Eurostat, [Ad-hoc voluntary data collection on Tourism Satellite Accounts 2022](#), 14 April 2023; ONS, [The UK Tourism Satellite Account 2019](#) (accessed 17 October 2023)

Notes: The EU average is calculated using countries for which data was available, and so excludes Bulgaria, Hungary, Malta and Poland.

<sup>46</sup> Eurostat, [Ad-hoc voluntary data collection on Tourism Satellite Accounts 2022](#), 14 April 2023

In 2019, the EU countries where tourism accounted for the greatest share of GVA were Croatia (11.3%), Portugal (8.1%) and Spain (6.9%). The EU average was 4.5%, above the UK figure of 3.6%.

## 4.2 Employment

In 2019 tourism-related activities were estimated to employ 4.2 million people.<sup>47</sup>

The ONS then adjusted this figure based on what share of the economic output from tourism-related activities can be attributed to tourism directly.

For example, the provision of accommodation services for visitors was estimated to employ 550,000 people in total. It was also estimated that 77% of the economic output from accommodation services came from tourism directly (part of the remainder may have come from, for example, providing hotel rooms to local people, not tourists).

This means the ONS estimated that tourism accounted for the direct employment of 424,000 people in providing accommodation services (multiplying 550,000 by 77%).

In total, tourism was estimated to directly account for the employment of 1.7 million people in the UK, the equivalent of 1.4 million full-time workers. This is 5.3% of all workers in the UK in 2019.<sup>48</sup>

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<sup>47</sup> ONS, [The UK Tourism Satellite Account](#), table 7, 24 February 2023

<sup>48</sup> ONS, [Number of people in employment \(aged 16 and over, seasonally adjusted\), series MGRZ](#), 12 September 2023

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## 5 Recent issues affecting tourism

The tourism industry has been affected by a number of events and issues in recent years, detailed below, most notably the Covid-19 pandemic. Overall, these have harmed the industry with VisitBritain forecasting a return to pre-pandemic inbound visitor numbers by the end of 2024.<sup>49</sup>

### 5.1 Covid-19

The pandemic almost entirely stopped international and domestic tourism during 2020 and continued to affect visitor numbers in the following years.<sup>50</sup>

Speaking to the Digital, Culture, Media and Sport Committee, UKHospitality chief executive Kate Nicholls noted that while many tourism-related businesses were supported during the pandemic by government funding, they also took on higher debt during this period and so emerged more fragile than they were in 2019.<sup>51</sup>

More information is available in the [Commons Library Briefing on the impact of Covid-19 on the hospitality industry](#).

### 5.2 Value of the pound

Over the past five years or so, the pound has been relatively weak, especially against the dollar, and to a lesser extent against the euro.

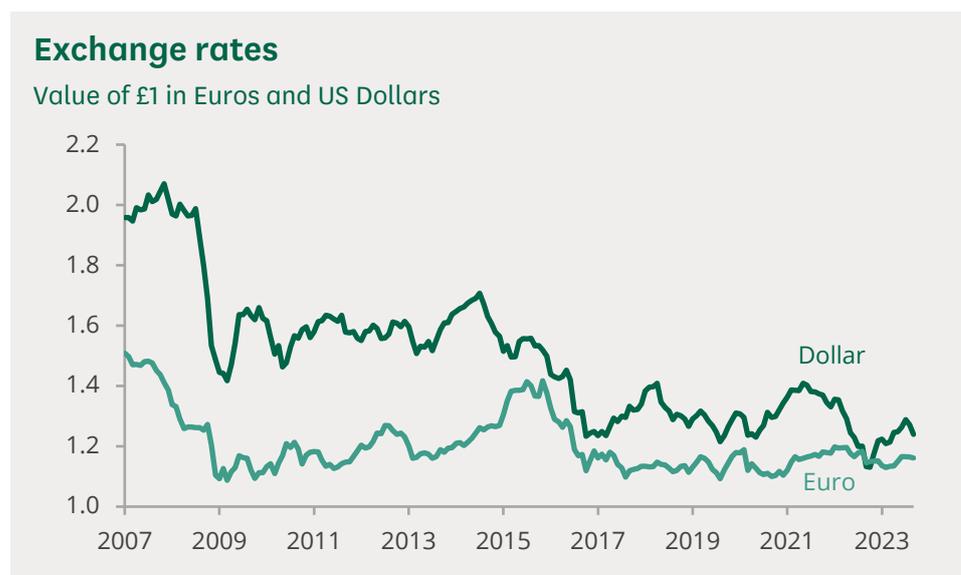
A weaker pound means that it is generally cheaper for overseas residents to visit the UK, which makes the UK relatively more attractive.

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<sup>49</sup> VisitBritain, [2023 inbound tourism forecast](#) (accessed 24 October 2023)

<sup>50</sup> ONS, [Coronavirus and the impact on the UK travel and tourism industry](#), 15 February 2021

<sup>51</sup> Digital, Culture, Media and Sport Committee, [Oral evidence: Promoting Britain Abroad](#), HC 856, 8 March 2022, Q166.



Source: [Bank of England database](#) (accessed 24 October 2023)

Note: Year marks on the horizontal axis represent January of that year.

It also makes staying in the UK relatively more attractive to UK tourists compared to travelling abroad.<sup>52</sup>

## 5.3

### Staff shortages

The hospitality sector has always had a higher vacancy rate than the economy overall, but this increased from around 40-50% above the UK average in summer 2019 to around 80-90% above the UK average in summer 2022.<sup>53</sup>

In April-June 2022, there were 7.2 vacancies for every 100 workers in the sector, 78% above the national average of 4.0. Though this has come down since to 5.0 vacancies per 100 workers as of July-September 2023, this is still above the 2019 level.

This may be a result of several factors.

Firstly, the rights of EU citizens to freely visit, live, work or study in the UK ended at the end of 2020 with the end of the transition period and this has affected the tourism industries' ability to hire workers.<sup>54</sup>

In June 2016, the month of the Brexit referendum, 18% of payrolled employees in the accommodation and food service sector were EU nationals compared to a national average of 8%.<sup>55</sup>

<sup>52</sup> Reuters, "[UK tourism set for boost from weak pound and 'staycationers' - survey](#)", 27 April 2017

<sup>53</sup> ONS, [Vacancies by industry](#), 17 October 2023

<sup>54</sup> UKHospitality, [Hospitality Workforce Strategy](#), p10-11, May 2022

<sup>55</sup> HMRC, [UK payrolled employments by nationality, region and industry](#), table 1, 23 March 2023

At the end of 2022, EU nationals still accounted for 8% of national employment, but only 12% of employment in the accommodation and food service sector, with the fall occurring from 2019. The number of EU nationals working in the sector is around 100,000, or 25%, lower than its pre-pandemic peak.

A fall in the number of EU nationals working in the sector coincided with an increase in the number of vacancies.

Another factor may be hospitality workers leaving the sector during the pandemic in search of alternative work. Trade body UKHospitality has called on the Government to widen the Youth Mobility Scheme and Shortage Occupation List to “solve recruitment woes”.<sup>56</sup>

The Youth Mobility Scheme allows young people from various countries, including Australia, New Zealand and Canada, but not the EU, to work in the UK for up to two years.<sup>57</sup>

Employers can hire foreign workers more easily, and pay them less, if they are recruited to a role on the Shortage Occupation List.<sup>58</sup> Until April 2021, chefs were on the list, but were removed on the recommendation of the Migration Advisory Committee (MAC).<sup>59</sup> UKHospitality has asked that they be re-added to the list.<sup>60</sup>

In October 2023, the MAC did not recommend chefs or other hospitality roles to be included on the list.

## 5.4 EU visitor passport requirements

Prior to October 2021, EU nationals were able to enter the UK using their EU ID card. However, they now need to have a passport.<sup>61</sup>

This is a barrier to travel for EU residents who don't own a passport and has been raised as a particular barrier for school children and young people. The nature of school trips means that just one child in a group not having a passport can result in the entire group going elsewhere.

In 2023, trade association the Tourism Alliance surveyed 145 businesses involved in bringing school groups to the UK.<sup>62</sup> Of those surveyed, 74% said

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<sup>56</sup> UKHospitality, “[Worker shortage fix needed if hospitality’s World Cup boost to continue](#)”, 26 August 2023

<sup>57</sup> Gov.uk, [Youth Mobility Scheme visa](#) (accessed 24 October 2023)

<sup>58</sup> Gov.uk, [Skilled Worker visa: When you can be paid less](#) (accessed 24 October 2023)

<sup>59</sup> [PQ 114993 \[Skilled Workers: Vacancies\], 8 February 2022](#)

<sup>60</sup> UKHospitality, “[Calls to expand Youth Mobility Scheme as chefs blocked from shortage list](#)”

<sup>61</sup> Home Office, “[Insecure ID cards phased out as travel document to strengthen UK borders](#)”, 1 October 2021

<sup>62</sup> Tourism Alliance, [2023 school group travel survey report](#), 19 June 2023

new passport requirements were an “extremely important” barrier and expected inbound school trips in 2023 to be 40% below their 2019 levels, while outbound school trips have more than recovered.

Also mentioned was the fact that children who are not nationals of the EU but are residents of the EU now require a visa to enter the UK which can add cost and administrative burden.

Some survey respondents mentioned that school groups wishing to take English language courses are instead choosing to travel to Malta or Ireland.

The Culture, Media and Sport Select Committee recommended the Government should allow children to travel under a single group ID card as part of a supervised educational or cultural trip, but the Government responded saying it had no plans to change its approach.<sup>63</sup>

However, since then the UK has agreed with France to reduce entry requirements from that country.

Speaking for the Government, Lord Murray of Blidworth told the House of Lords: “It is open to other Governments to negotiate an arrangement of the kind we have now negotiated with the French Government, and we would welcome such a step.”<sup>64</sup>

## 5.5

### VAT rules

As a member of the EU, the UK was required to have a tax-free shopping scheme. This allowed non-EU residents to claim back the VAT on goods purchased in the UK and which were taken back home by the visitor (so, not consumed within the UK).<sup>65</sup>

At the end of the Brexit transition period, the Government had to decide whether to expand the scheme to cover EU residents as well (due to World Trade Organisation Rules) or abolish it. The Government withdrew the scheme in Great Britain, though it remains in Northern Ireland.

Various industry bodies and representatives have warned about the effect this may have had on retail tourism from countries like China and the Gulf states.<sup>66</sup>

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<sup>63</sup> Digital, Culture, Media and Sport Committee, Fifth Special Report of Session 2022–23, [Promoting Britain abroad: Government Response to the Committee’s Second Report](#), HC 1103, 2 February 2023

<sup>64</sup> [HL Deb 19 June 2023 \[School Trips to the United Kingdom\]](#)

<sup>65</sup> [Commons Library Debate Pack CDP-2023-0169, Tax-free shopping for international visitors, 04 September 2023](#)

<sup>66</sup> Digital, Culture, Media and Sport Committee, Promoting Britain Abroad inquiry, [Written evidence by HM Treasury](#), 18 October 2022

The Truss Government planned to reintroduce tax-free shopping, though these plans were scrapped shortly after being announced.

At the time the Treasury estimated the scheme would cost around £2 billion a year in lost VAT revenue but could stimulate additional retail spending of around £2.0 billion to £2.5 billion.<sup>67</sup>

More recently, the Treasury has said it would cost £2 billion per year, after taking into account increased tourist spending.<sup>68</sup>

## 5.6 Cost of living

The [rising cost of living](#) has both reduced the real-terms spending power of households and increased costs for businesses, both of which may have affected tourism.

### Effects on visitors

In September 2023, the Resolution Foundation projected real household incomes (that is income after adjusting for inflation) to have fallen in 2022/23 and then stagnated in 2023/24, which would mean a combined two-year fall in real household income of 4%.<sup>69</sup>

Various surveys indicate a significant proportion of the public claiming to have cut back spending on holidays in response to the rising cost of living.<sup>70 71</sup>

While spending on tourism has increased as the cost of living has increased (coinciding with the ending of Covid restrictions)<sup>72</sup>, these survey results may reflect that people are spending less than they would have done, rather than less than they did under Covid restrictions.

### Effects on businesses

In November 2022, the ONS published [an article](#) about cost pressures on hospitality businesses.<sup>73</sup>

It found that hospitality businesses reported being more affected than other businesses by rising energy prices.

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<sup>67</sup> Digital, Culture, Media and Sport Committee, Second Report of Session 2022–23, [Report, together with formal minutes relating to the report](#), HC 156, 24 October 2022

<sup>68</sup> [PQ 192514 \[Tourism: VAT\]](#), 11 July 2023

<sup>69</sup> Resolution Foundation, [The living standards outlook – summer 2023 update](#), 6 September 2023

<sup>70</sup> YouGov, [“Cost of living: what have Britons had to cut back on?”](#) 23 May 2022

<sup>71</sup> Liberal Democrats, [“Poll reveals Brits cutting back on summer holidays and eating out due to cost of living crisis”](#), 8 August 2023

<sup>72</sup> Gov.uk, [“Prime Minister sets out plan for living with COVID”](#), 21 February 2022

<sup>73</sup> ONS, [“Food and drink service firms are most likely to cut trading to tackle energy costs”](#), 14 November 2022

Food and drink service businesses were more likely than any other industry to say they plan to cut trading by at least two days per week in November 2022 to reduce energy costs.

Inflation more generally was only the main concern for 6% of accommodation providers, but 30% of food and drink service businesses, above the average of 25% across all businesses.

## 5.7 Industrial action

Industrial strikes, primarily in the transport sector, have increased in frequency through 2022 and 2023.

This may have affected leisure and tourism spending.

Research by the ONS found nearly 1 in 5 people had travel plans disrupted during December 2022 and early January 2023. Almost half of those affected said they were unable to attend leisure activities.<sup>74</sup>

## 5.8 Electronic travel authorisation (ETA)

From November 2023, the UK will start requiring that visitors who do not require a visa to visit the UK, instead have an electronic travel authorisation (ETA) before they visit. This costs £10 and can be applied for online.

The rollout will first start with Middle Eastern countries and be fully implemented by the end of 2024.

Prior to the rollout of the ETA, various nationals including EU and US nationals did not require any advance permission before travelling.

Once rolled out, only Irish residents will be able to visit the UK without any form of advance permission.

The ETA has been raised as a particular issue for UK tourism with respect to tourism across the land border in Ireland.

Non-visa nationals visiting Ireland, prior to the ETA, could add on a trip into Northern Ireland with no UK immigration implications. They will now be expected to have an ETA or risk committing a criminal offence.

The British-Irish Parliamentary Assembly, a group of legislators from both countries, has said that a significant portion of visitors to Northern Ireland

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<sup>74</sup> ONS, [The impact of strikes in the UK: June 2022 to February 2023](#), 8 March 2023

arrive in Ireland first.<sup>75</sup> The ETA requirements may either risk foreign travellers entering Northern Ireland illegally unawares, or choosing not to bother with visiting Northern Ireland, given the administrative and cost burden.

The assembly singled out coach and group tours as a market particularly sensitive to this burden.

## 5.9 Perception of the UK

There is some evidence that the perception of the UK as a tourist destination has fallen in recent years, though it is hard to identify the causes of this. This may be driven by a more negative view of the UK, or more positive views of other countries.

VisitBritain publishes data which ranks the UK among 60 countries on a range of attributes relating to tourism, culture, people. Between 2008 and 2020, the UK ranked between 2<sup>nd</sup> and 4<sup>th</sup>, though dropped to 5<sup>th</sup> in 2021 and 6<sup>th</sup> in 2022.<sup>76</sup>

VisitBritain said it had seen a decline in Britain being viewed as a welcoming destination in some key markets including Germany and Spain.<sup>77</sup>

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<sup>75</sup> British Irish Parliamentary Assembly, [Protecting the Common Travel Area in the post-Brexit era \(pdf\)](#), October 2023

<sup>76</sup> VisitBritain, [How the world views the UK 2022](#), 11 November 2022

<sup>77</sup> Digital, Culture, Media and Sport Committee, Promoting Britain Abroad inquiry, [Written evidence by VisitBritain](#), 25 January 2022

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## 6 Government policy

### 6.1 Tourism recovery plan

In June 2019, the UK Government announced the [Tourism Sector Deal](#). The aim of the deal was to boost productivity within the tourism sector, develop skills of the UK workforce, and support tourism destinations in the UK.<sup>78</sup>

It also published the [International Business Events Action Plan](#) to support events like conferences.<sup>79</sup> This included plans to increase Government advocacy, financial support for VisitBritain, and improving the border and visa experience for overseas travellers.

Both of these plans were replaced with the [Tourism Recovery Plan](#), published in June 2021.<sup>80</sup>

This set out six objectives:

- Recover domestic overnight trip volume and spend to 2019 levels by the end of 2022, and inbound volume and spend to 2019 levels by the end of 2023, ahead of independent forecasts.
- Ensure the sector's recovery benefits every nation and region with visitors staying longer, higher occupancy rates in off-season, and high levels of investment in tourism products and transport infrastructure.
- Improve the productivity and resilience of the sector by maximising the potential for data and technology and supporting skills development.
- Ensure the tourism industry contributes to the conservation of the country's heritage, minimising damage to the environment.
- Ensure tourism is inclusive and open to all, aiming for the UK to be the most accessible destination in Europe by 2025.
- Make the UK a leading European nation for hosting business events.

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<sup>78</sup> Gov.uk, [Tourism: Sector Deal](#), 28 June 2019

<sup>79</sup> Gov.uk, [International Business Events Action Plan](#), 28 June 2019

<sup>80</sup> Gov.uk, [Tourism Recovery Plan](#), 11 June 2021

## Progress against the plan

The Government published an update on delivery against these objectives in 2023.<sup>81</sup>

On returning domestic tourism to 2019 levels, the report noted that data on domestic overnight tourism is not comparable between 2019 and 2021/2022 (for details, see section 3).

However, it said that accommodation occupancy rates in England rose to 2019 levels, and this was also true in regions dominated by domestic rather than international tourism (such as the North East).

It did note though that while the occupancy rate had recovered, it was hard to say whether that meant domestic overnight tourism had recovered, as the total number of rooms may have decreased.

Domestic tourism spending data also showed “encouraging” improvements between 2020 and 2022.

Inbound tourism is still considerably lower than the level pre-pandemic, though the Government’s target was for this to recover by the end of 2023. VisitBritain estimates it will recover to pre-pandemic levels by 2024.<sup>82</sup>

Against the other objectives, the Government highlighted the roll-out of various policies, some of which were tourism-specific and some which were more general.

For example, against the objective to ensure the sector’s recovery benefits every UK region, the report highlighted grants provided through the Culture Recovery Fund, Towns Fund and Levelling Up Fund.

In addition to the pledges made in the tourism recovery plan, the delivery update outlined support tourism businesses had been provided in response to rising inflation including [schemes to subsidise energy bills](#).

Other financial support included the extension of [business rates relief](#) up to 2023/24 and the [recovery loan scheme](#) for small and medium sized businesses.

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<sup>81</sup> Gov.uk, [Tourism Recovery Plan: Update on delivery](#), 21 March 2023

<sup>82</sup> VisitBritain, [2023 inbound tourism forecast](#) (accessed 24 October 2023)

## 6.2

## Review of destination management organisations

In March 2021 the Government announced an independent review into destination management organisations (DMOs) by Nick de Bois, Chair of the VisitEngland advisory board.<sup>83</sup>

As tourism is a devolved responsibility, the review only covered England. The review included detail on the arrangements in Scotland and Wales for comparison.<sup>84</sup>

DMOs promote their area as a visitor destination. They are a diverse group of organisations: they may be part of a local authority, a limited company, and receive funding from the private sector, public sector or a mix of the two.

The de Bois review, published in August 2021 found that DMOs are important organisations, some of which, but not all, are performing well.

It found that the fragmented landscape of DMOs was confusing to navigate, and there was a desire for a simplified structure, with clear channels of communication between DMOs and the Government.

It found that the pandemic had led to a large drop in commercial funding, and DMOs' public funding had also been cut through the 2010s. This had some benefits in DMOs being more entrepreneurial in securing funding, but downsides in some DMOs focusing too much on the desires of their members and spending too much time fundraising.

A focus on marketing meant DMOs are not in a position to support the Government to deliver tourism policies, and DMOs are often not heard by decision-makers.

### Recommendations

The review set out six recommendations to Government for improving the DMO landscape.

DMOs would be renamed tourist boards, accredited by VisitEngland, and split into a top tier of "destination development partnerships", provided core funding by the Government, and a second tier of accredited tourist boards.

DMOs which did not need national accreditation standards, likely very small DMOs, would be automatically considered as part of a third tier.

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<sup>83</sup> Department for Digital, Culture, Media & Sport, [The de Bois review: an independent review of Destination Management Organisations in England](#) (pdf), August 2021

<sup>84</sup> As above, page 34-35

The role of the tourism minister would change, by elevation to a minister of state position, or making the minister responsible for teams within multiple departments.

Finally, the review recommended introducing a tourism data hub as a matter of urgency.

The review also made some recommendations to DMOs, local authorities, and local enterprise partnerships.

## Government response

The Government agreed to implement a three-tier structure of tourist boards, named “Local Visitor Economy Partnerships (LVEP)” (as the term tourist board has its own definition in legislation).<sup>85</sup>

Accreditation will be managed by VisitEngland, and the Government agreed to pilot core funding in the first instance, rather than roll it out to all accredited first-tier LVEPs. It said this was to ensure value-for-money and because not all parts of the country would be ready to take on public funding if made available.

It disagreed that any changes were needed to the position or remit of the tourism minister but said it had introduced a new inter-ministerial group to coordinate policy with an impact on tourism across relevant government departments.

It agreed in principle with the need for better data, highlighting ongoing work in this area, alongside challenges with quickly collecting quality information.

## 6.3

## Promoting Britain abroad inquiry

In October 2022 the Digital, Culture, Media and Sport Committee published its report following its [inquiry into the promotion of tourism abroad](#).<sup>86</sup>

The report was critical of several Government policies it claimed had harmed tourism. These included a requirement for EU citizens travelling to the UK to have a passport, the removal of tax-free shopping (both detailed in section 5), and a reduction in VisitBritain’s marketing budget, which it said was lower than in other countries.

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<sup>85</sup> Department for Digital, Culture, Media & Sport, [Government response to the independent review of destination management organisations in England](#), 20 July 2022

<sup>86</sup> Digital, Culture, Media and Sport Committee, [Promoting Britain abroad Second Report of Session 2022–23](#), 24 October 2022, HC156

The Government rejected most of the recommendations made by the Committee to deal with these issues.<sup>87</sup>

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<sup>87</sup> Digital, Culture, Media and Sport Committee, [Promoting Britain abroad: Government's Response to the Committee's Second Report Fifth Special Report of Session 2022-23](#), 2 February 2023, HC 1103

## 7

## Structure of the “tourism landscape”

The “tourism landscape” is composed of the bodies that market and seek to encourage growth in UK tourism.

Tourism is devolved, so the UK Government sets England’s tourism strategy while the Welsh Government, Scottish Government and Northern Ireland Executive set tourism strategy in their respective parts of the UK.

That said, some policy areas which affect tourism, such as border policy, are reserved to the UK Government.

While various departments have influence over tourism policy, this is led by the Department for Culture, Media and Sport.

The UK Government funds the British Tourist Authority, trading as [VisitBritain](#) and [VisitEngland](#). These organisations are responsible for promoting tourism which involves running global advertising campaigns, supporting businesses with tools and resources, and accrediting local visitor economy partnerships (see section 6.2).<sup>88</sup>

The equivalents to VisitEngland in other parts of the UK are [VisitScotland](#), [VisitWales](#) and [Tourism Northern Ireland](#).<sup>89</sup>

In many areas of England, destination management organisations (DMO), some of which are now rebranded as local visitor economy partnerships (LVEPs), promote tourism at a local level. These include a mix of public, private and public-private organisations, such as limited companies or departments within local authorities.

In other parts of the UK local authorities may have their own tourism strategies.

Additionally, in England, local enterprise partnerships (LEPs) between local authorities and businesses work to lead economic growth and job creation more generally in their areas, and this may involve promoting tourism. In August 2023, the Government announced that central government funding for LEPs would be withdrawn and their functions transferred to local and combined authorities.<sup>90</sup>

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<sup>88</sup> VisitBritain, “[What we do](#)” (accessed 26 October 2023)

<sup>89</sup> VisitBritain, “Introduction to tourism in Britain” (accessed 26 October 2023)

<sup>90</sup> Gov.uk, [Transfer of Local Enterprise Partnership \(LEP\) core functions to combined and local authorities](#), 4 August 2023

The [Tourism Industry Council](#) is a board with representation from the Government and industry which advises the Government on issues affecting tourism. It contains working groups on the events industry, inclusivity and accessibility, international competitiveness, and sustainability.<sup>91</sup>

The tourism industry is represented by a range of membership organisations, including [UKHospitality](#), [UKinbound](#), the [Tourism Alliance](#), the [Association of British Travel Agents](#), and the [Association of Leading Visitor Attractions](#).

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<sup>91</sup> Gov.uk, [Tourism Industry Council](#)

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