

The Social Value of Tourism

Nicola Said, Regional Lead, VisitEngland



PUBLIC FIRST

A SHGH Company



VisitEngland™

Who are VisitBritain/VisitEngland?

VisitBritain/VisitEngland has a statutory duty to promote Britain as a destination to grow tourism value and volume, support the visitor economy, advise on tourism policy and provide timely research. It is an arm's length body of DCMS.

British Tourist Authority

VisitBritain

***Driving Demand** - VisitBritain operate in 22 markets around the world, promoting trade connections and inspiring visitors to pick Britain for their next trip. VisitBritain also receive funding from the Cabinet Office to amplify marketing under the GREAT brand.*

International Consumer
Marketing

International Sales
& Trade Missions

GREAT
Campaign

Commercial
Partnerships

PR, Website
& Influencer
Engagement

VisitBritain's
International
Network

Travel Trade
Engagement

VisitEngland

***Supporting Supply** - VisitEngland support the sustainable growth of the English visitor economy by providing businesses and destinations with the platforms, advice, training and insights they need to grow and winning business events in priority sectors.*

Visitor Economy SME
Support

LVEP & DPP
Network

Accessibility
&
Sustainability

Growth
Support –
Training &
Advice

Digital &
Commercial –
Shop & TXGB

Accreditation

Training &
Support

Overview



- **Introduction - Why do the research?**
- **Approach – methodology**
- **Report structure**
 - **Community Roots – Pride, Identity and Empowerment**
 - **Shared Spaces – Nature, Culture and Everyday Benefits**
 - **Future Pathways – Growing Regenerative and Inclusive Tourism**
- **Communication, learnings and what next!**

Methodology

Combined quantitative & qualitative insights to capture tourism's full social value

- Rapid Evidence Assessment
- Survey – Nationally representative poll of 3,017 British adults (Oct–Nov 2024)
- Case Studies & Interviews – Local government, tourism bodies, parks, attractions, heritage, hospitality
- Tourism Data – Great Britain Tourism Survey & Day Visits Survey
- Employment Analysis – Compared pay, hours, gender equality, job stability

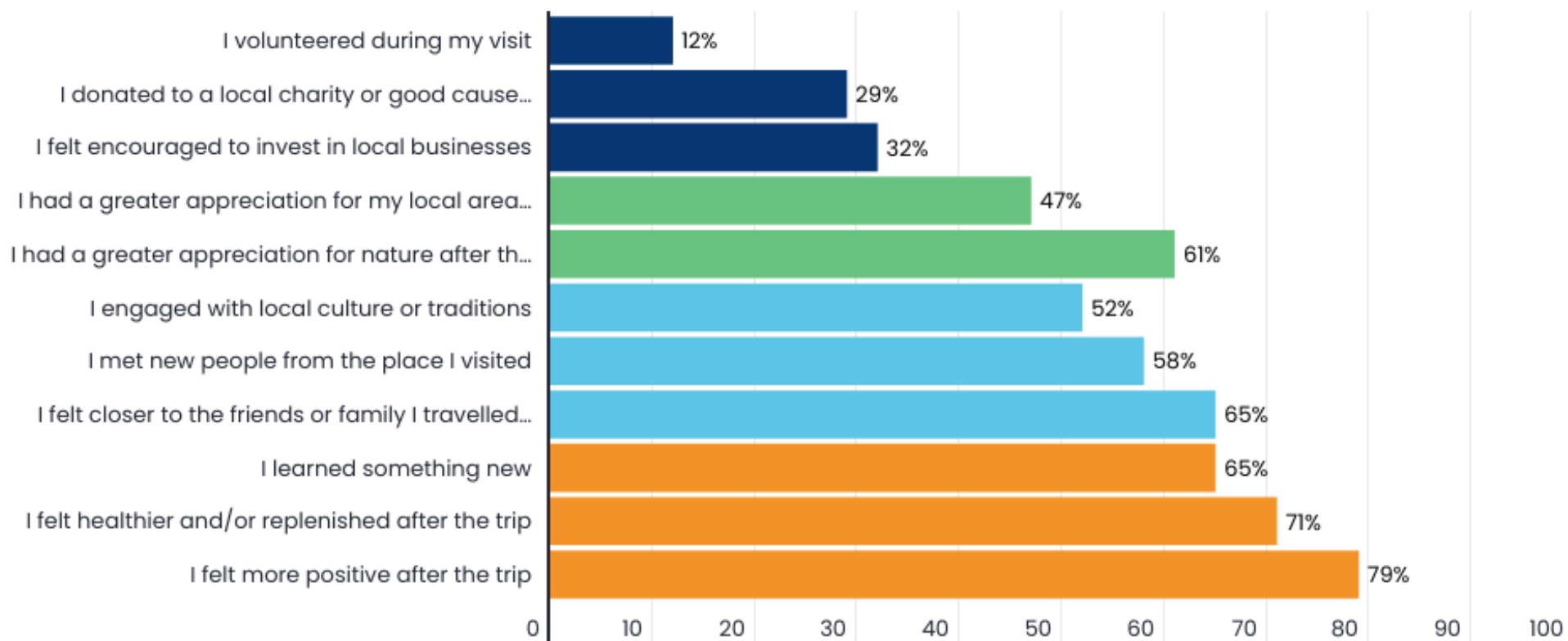
A word on host versus non-host communities

- Host communities - People who live in areas most impacted by tourism, identified as those who see tourists or visitors in their local area relatively frequently in day-to-day life
- Non-host communities - Areas where residents have little or no regular contact with tourists.

Tourism brings a wide range of benefits for travellers

Thinking about the holidays you have gone on within the UK in the past year, did you do or experience any of the following?

Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct – 11th Nov 2024



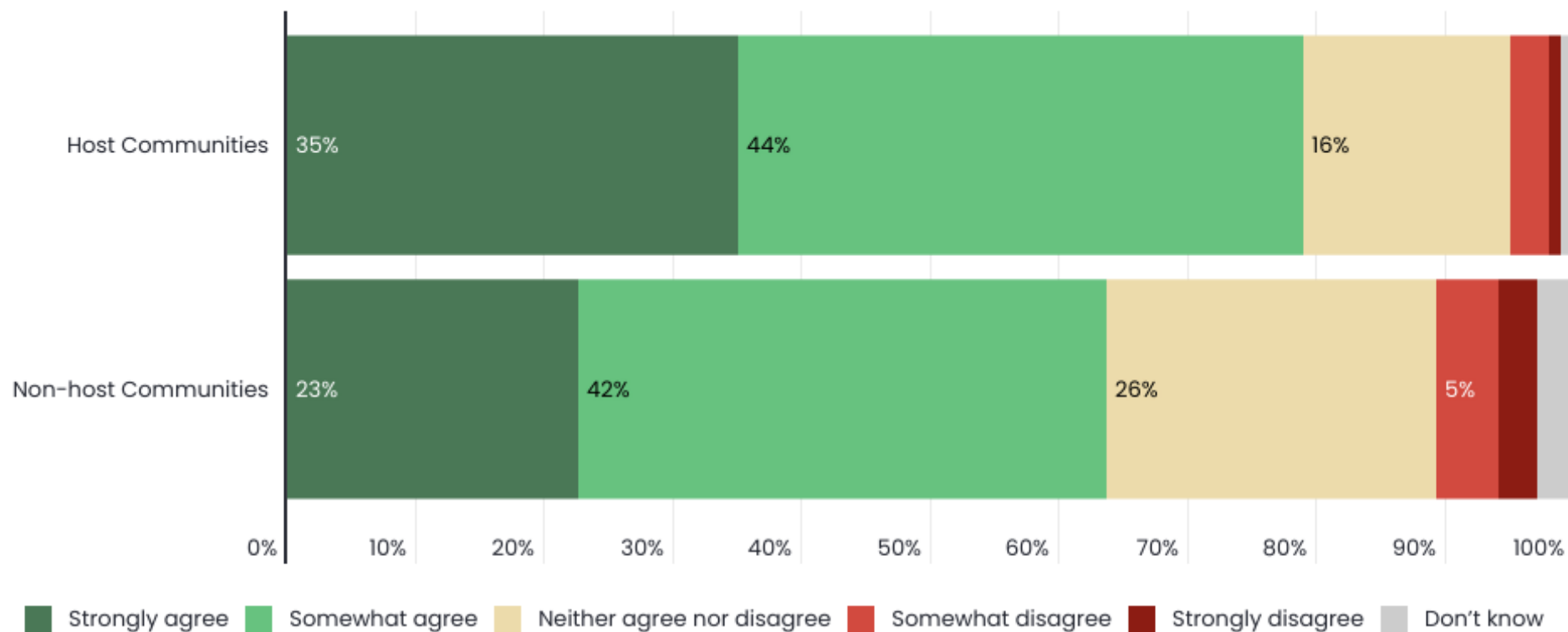
Personal | Social | Place-based | Altruistic & Economic

Community Roots – Pride, Identity, Empowerment

The public – especially those in host communities - are proud that the UK is a tourist destination

To what extent do you agree or disagree with the following?
I'm proud that visitors come to the UK from all around the world.

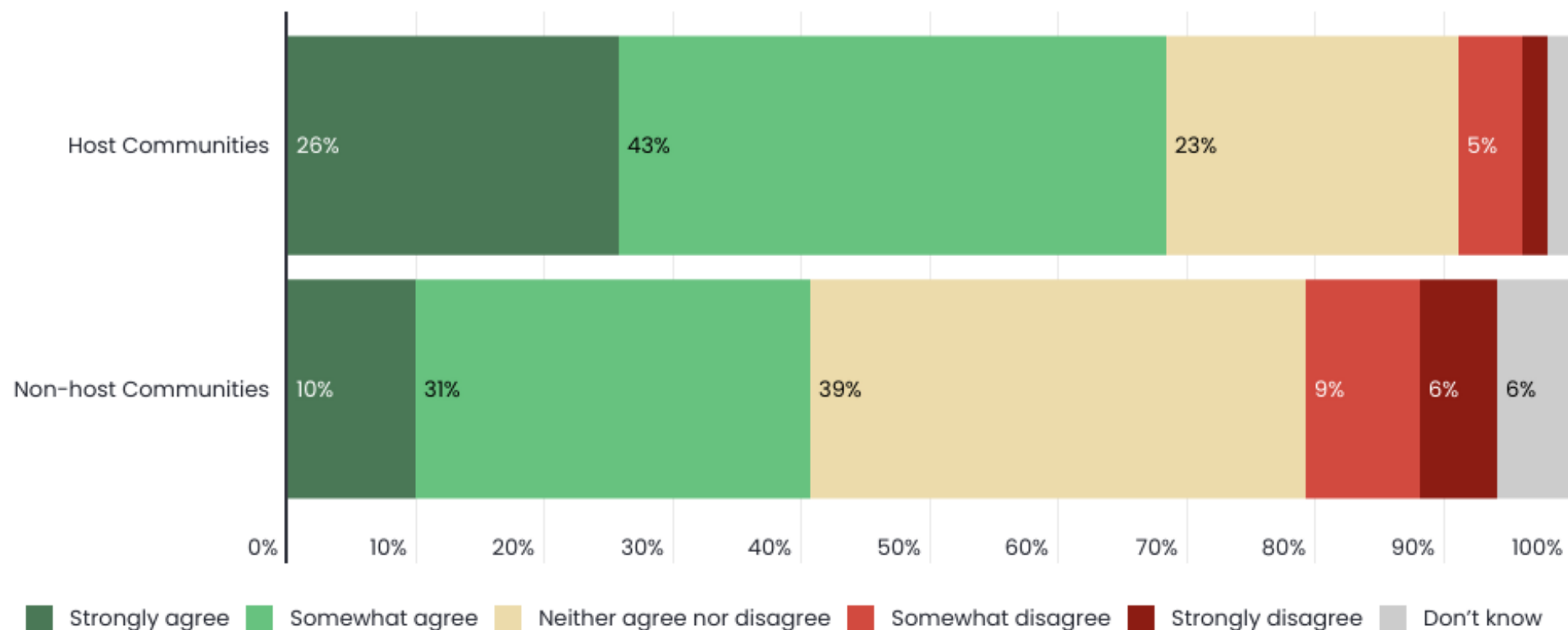
Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct – 11th Nov 2024



And those in host communities are also proud people want to visit their area

To what extent do you agree or disagree with the following?
I'm proud that people want to visit my local area

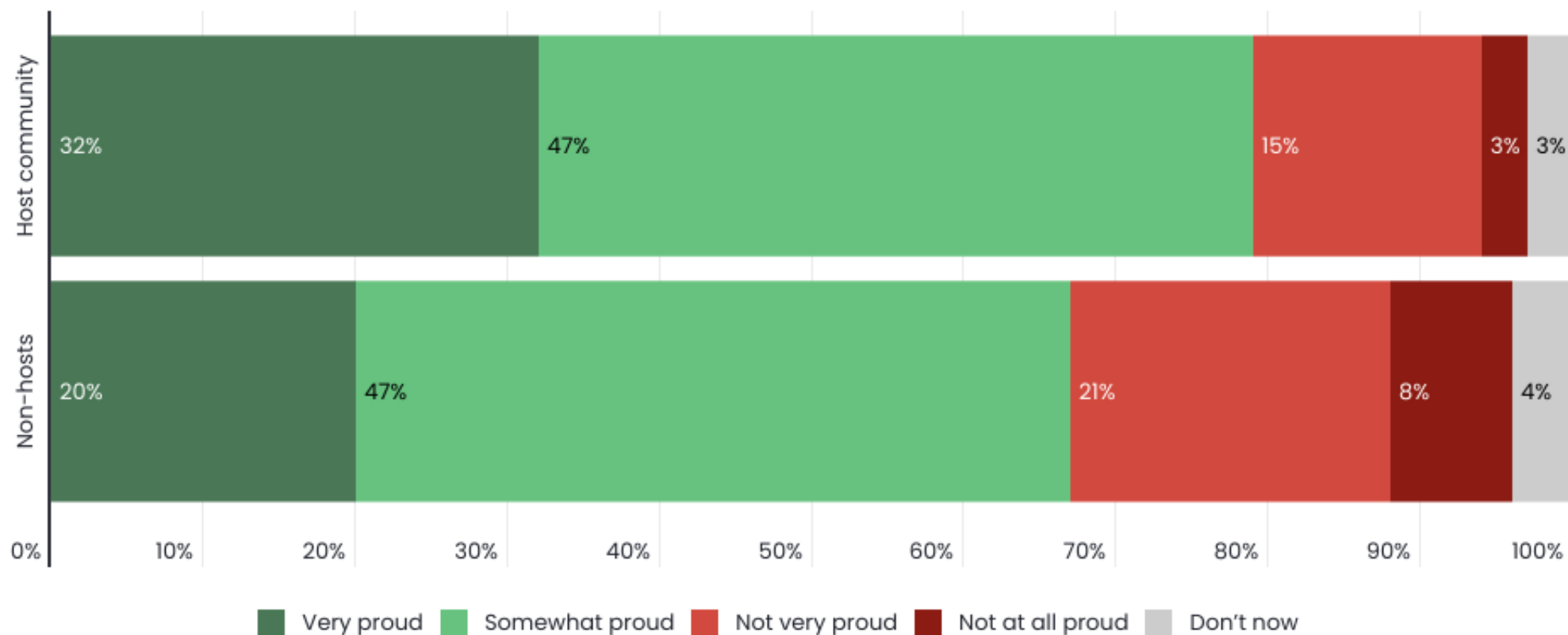
Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct – 11th Nov 2024



This reflects higher levels of local pride in host areas

How proud are you of living in your local area?

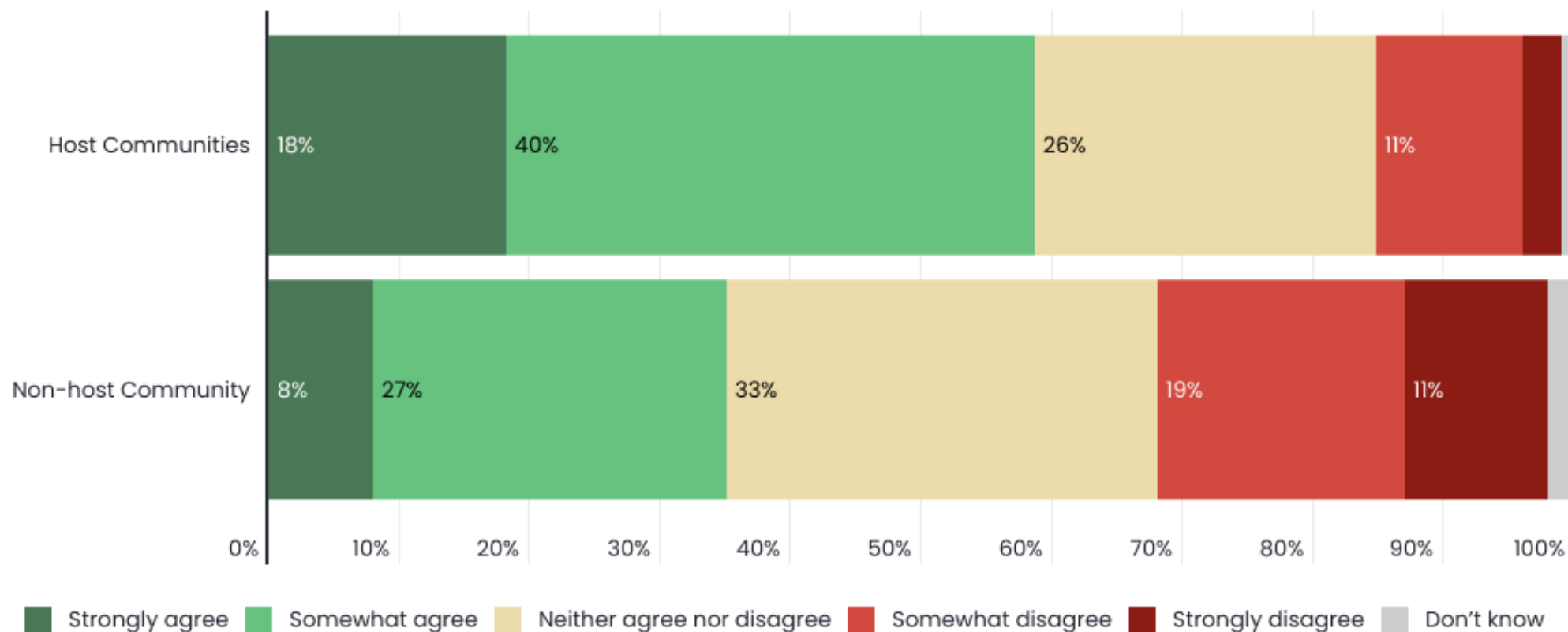
Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct – 11th Nov 2024



Higher levels of connectedness

To what extent do you agree or disagree with the following?
I feel connected to my community.

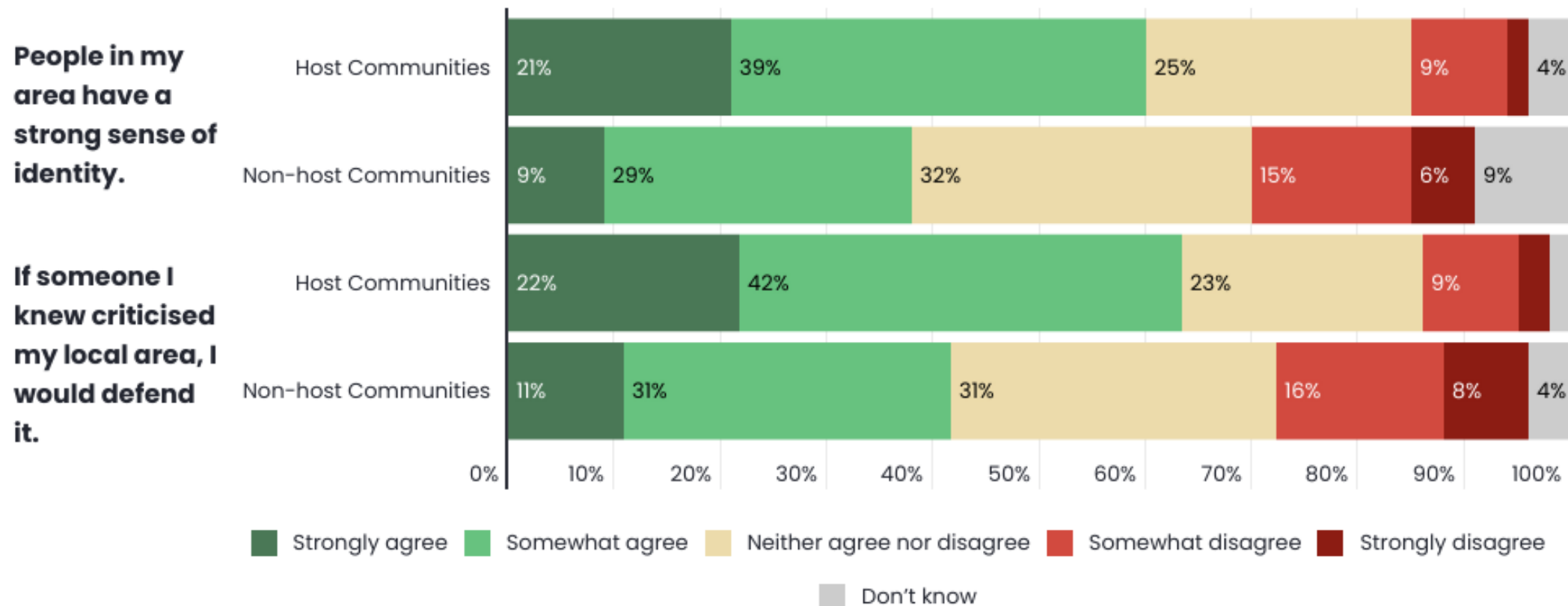
Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct – 11th Nov 2024



And higher levels of social cohesion

To what extent do you agree or disagree with the following?

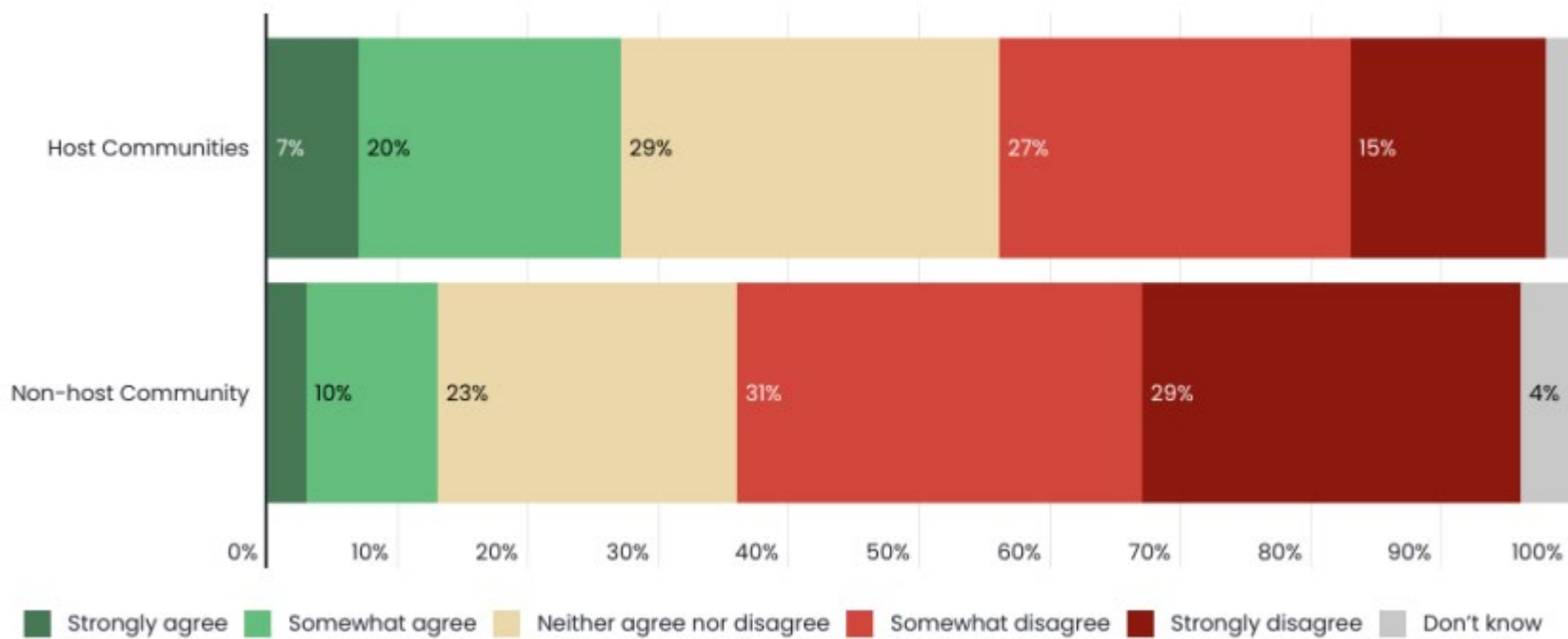
Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct – 11th Nov 2024



Though residents in both host and non-host communities still say they lack power over local issues

To what extent do you agree or disagree with the following?
If I didn't like something in my area, I feel I have the power to change it.

Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct – 11th Nov 2024



Case study – Eurovision 2023 in Liverpool



“

“As a city, we wanted to do Eurovision justice. The reason hosting it worked is because the people of the city were behind it. Getting residents on board and making them feel proud of it meant they acted as ambassadors for the city.”

”

Claire McColgan CBE

Associate Director of Culture for the Liverpool City Region Combined Authority



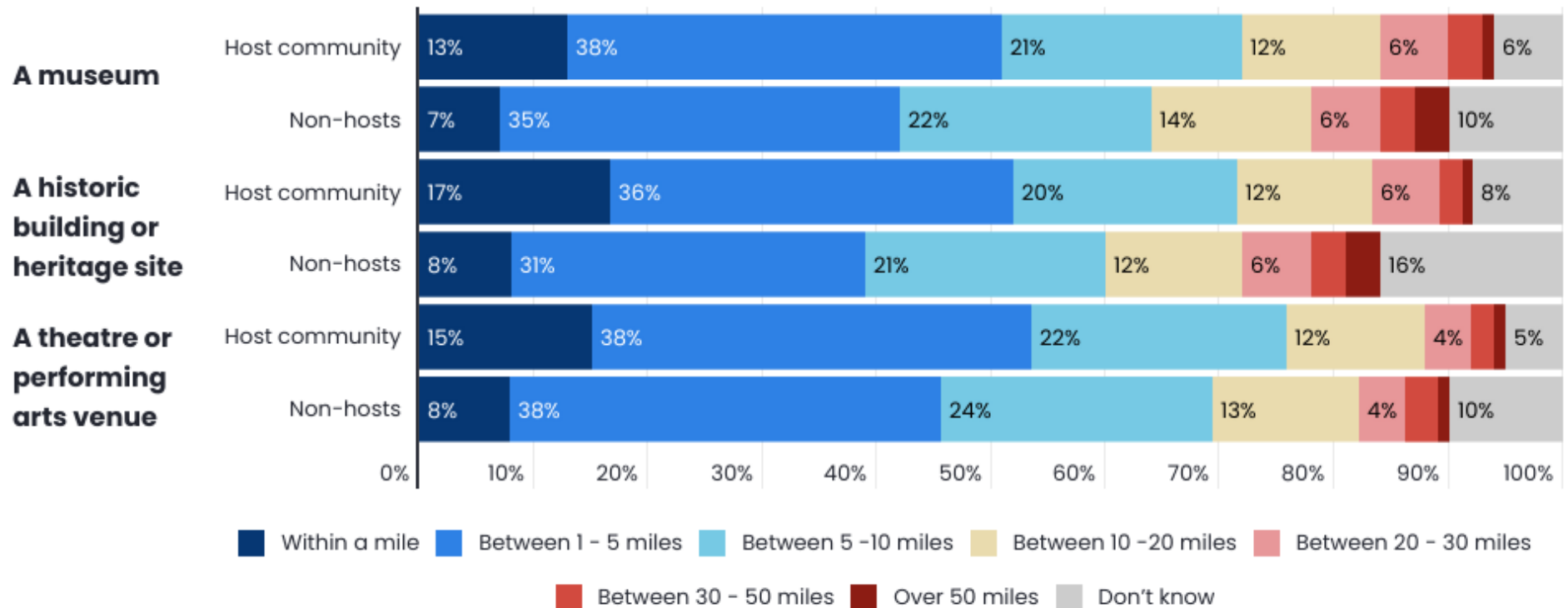
Shared Spaces

– Nature, Culture, Everyday Benefits

Host communities have better access to cultural and heritage assets as well as green spaces and nature

How close do you live to each of the following?

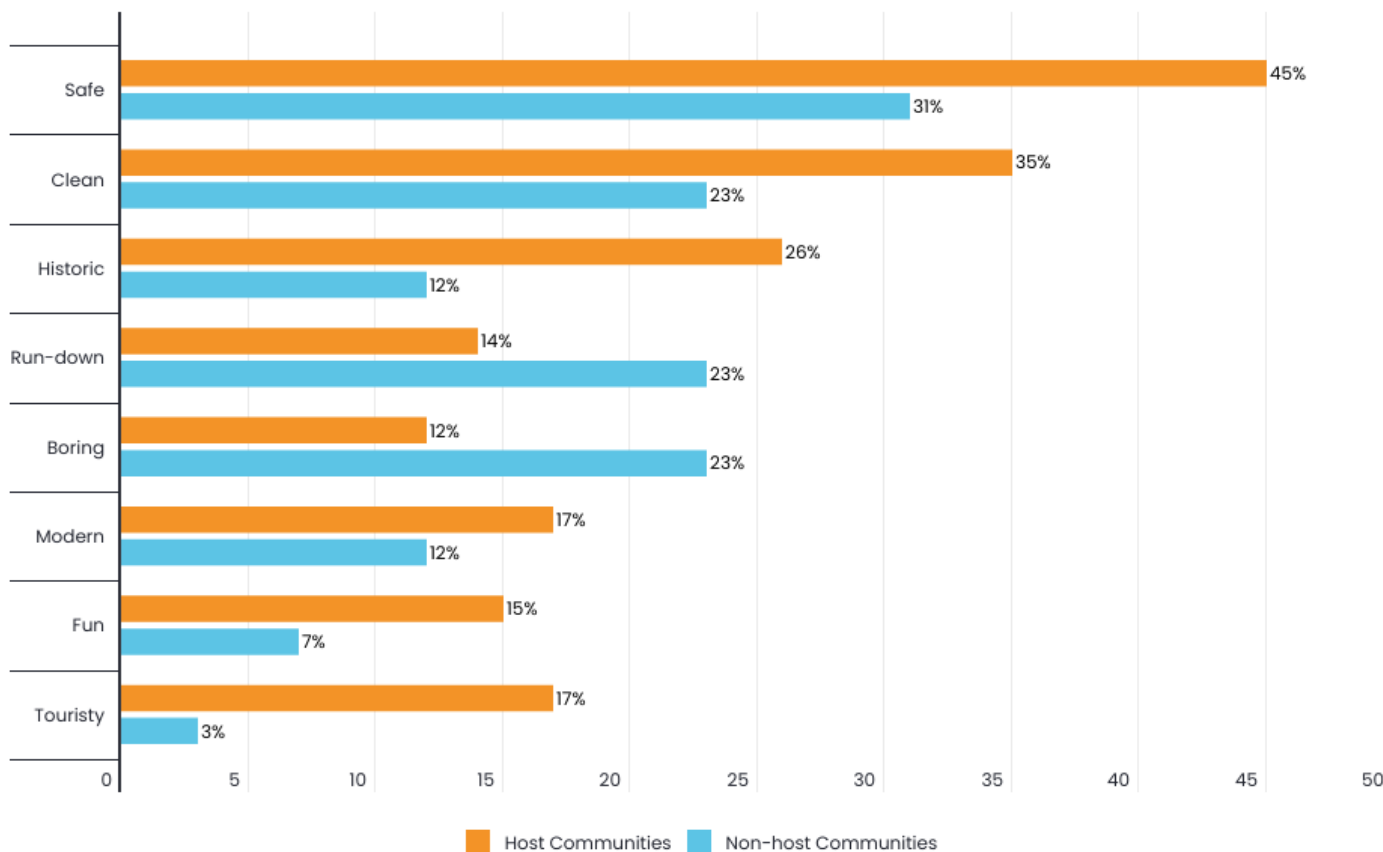
Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct- 11th Nov 2024



This is reflected in residents of host communities seeing their local areas more positively

Which of the following words best describe your local area?

Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct- 11th Nov 2024





And feeling they have better quality local services and facilities – with no consistent link between tourism and perceived strain on these

Case study – Bath



“ Visitors are a huge driver of prosperity for places like Bath but we need to show how tourism gives back to local people. Ideally we want provision for tourists and residents to blur into one; there is no reason that the businesses and offer of a destination can't work for both groups if they are carefully planned. ”

Robert Campbell

Head of Culture and Heritage Services · Bath & North East Somerset Council



Case study – Generation Green 2



“ Spending time in nature can be life-changing for young people, especially those who may not usually have easy access to green spaces. Here in the North York Moors, we see how being outdoors builds confidence and resilience, inspires curiosity and helps young people feel that they belong in these spaces, and they have a role in protecting them for the future. ”

Heather McNiff

Head of Engagement and Wellbeing at the North York Moors National Park Authority





Future Pathways

– Growing Regenerative and Inclusive Tourism

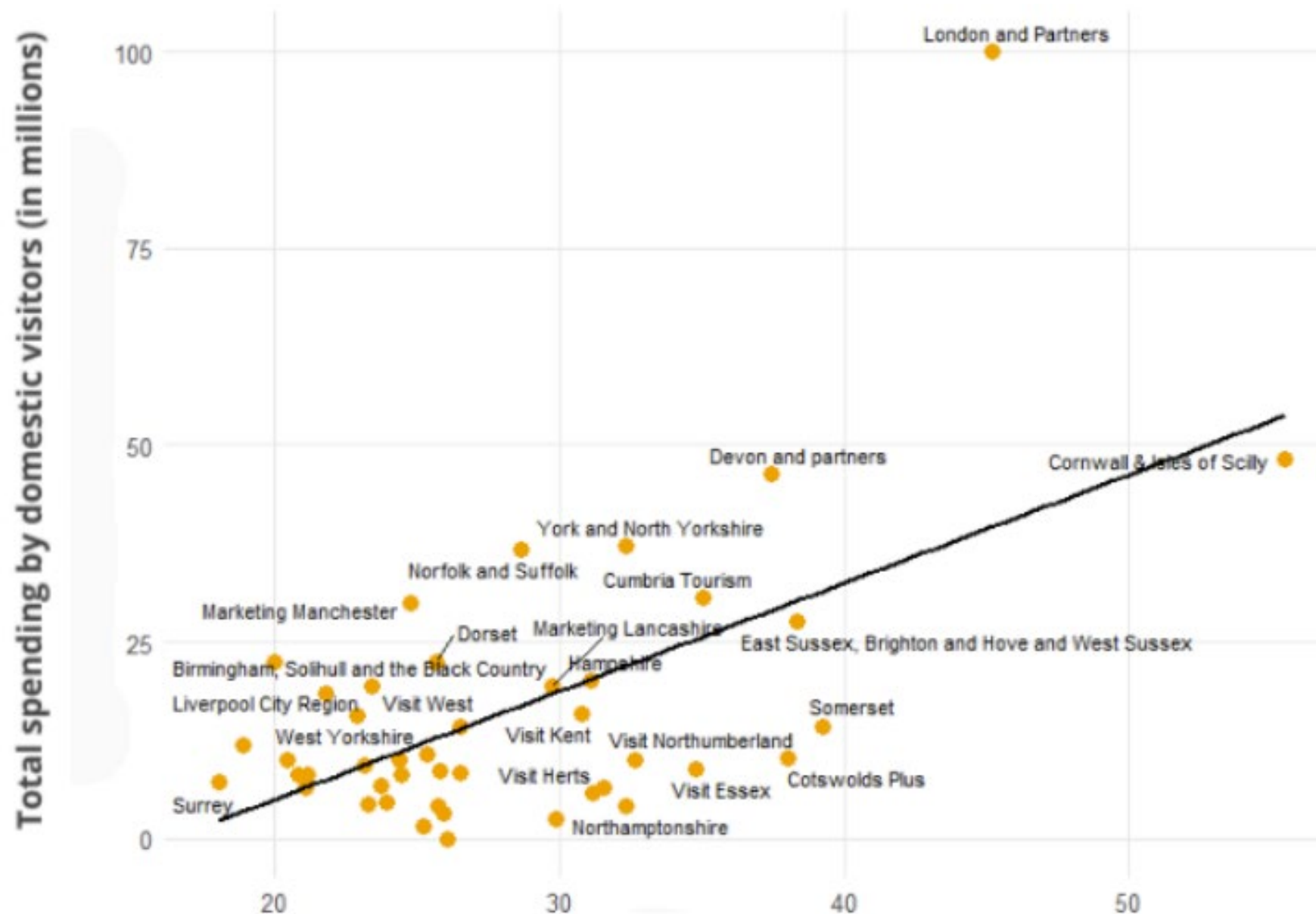
Tourism can be a catalyst for strengthening and re-generating communities

We created a **Social and Cultural Strength Index**, bringing together:

- The density of nearby cultural, recreational, and heritage sites, including parks, gardens, monuments, and historical sites.
- The density of businesses locally, as well as the density of arts, entertainment, and recreation businesses locally.
- The self-reported strength of national and regional identities, constructed from asking respondents in our poll to rate the strength of their English and regional identities.

We found areas with higher levels of visitors or with **higher levels of visitor spending, are also more likely to score highly on the Social and Cultural Index**

Social and cultural strength index



Case study – The National Forest



“

We can demonstrate that sustainability is achievable here in the National Forest and, like the trees in the forest itself, we all work together as one.

”

Richard Drakeley

Tourism Lead at the National Forest

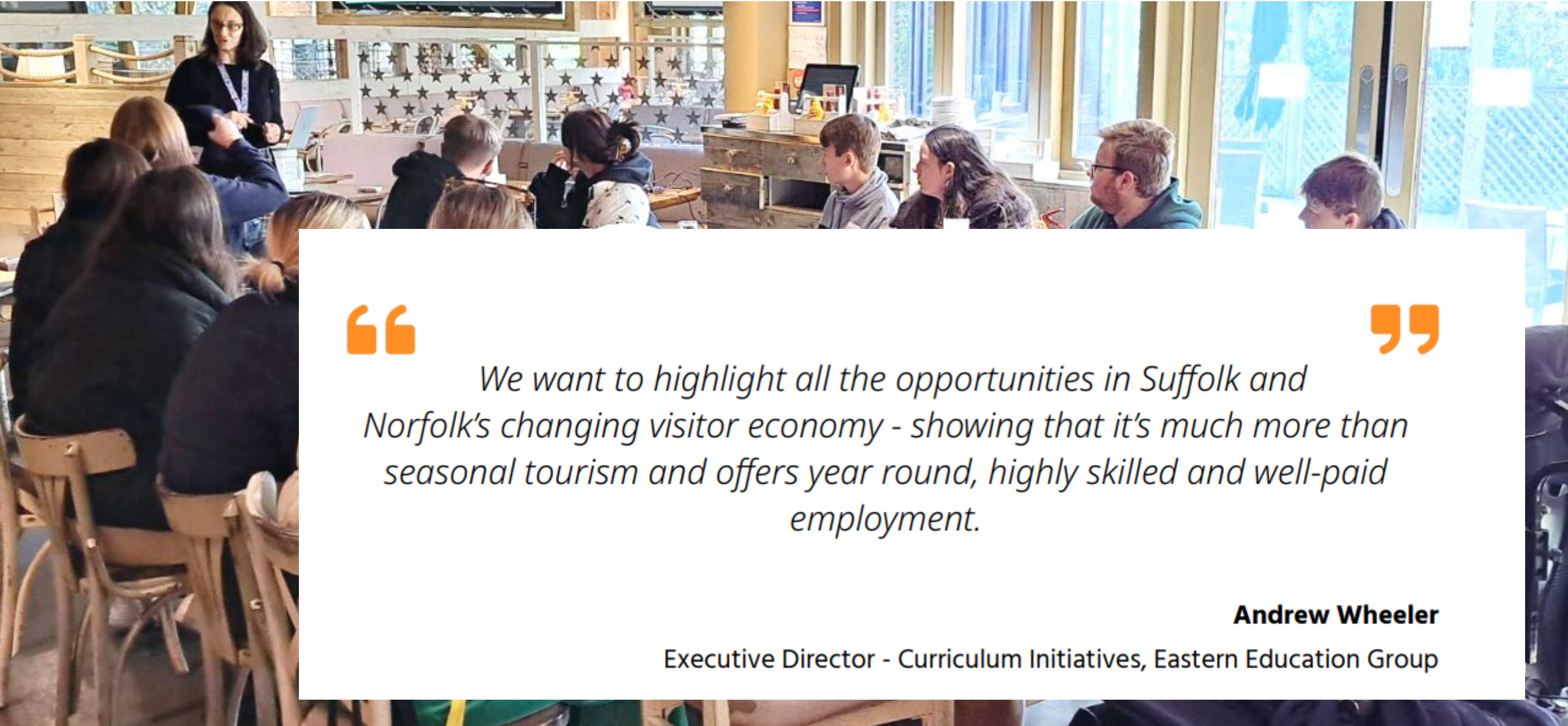
Employment – Social Productivity Index

OUTCOME	CHARACTERISTIC	EVIDENCE
Economic impact	Resilient growth - how did each sector perform in the period before and after the pandemic?	<ul style="list-style-type: none"> • Pre-pandemic growth • Post-pandemic growth
	Economic contribution – how much does each sector add to the economy, after costs?	<ul style="list-style-type: none"> • Gross Value Added
Geographic impact	Geographic spread - how widely spread across the regions of the UK are the jobs provided by each sector?	<ul style="list-style-type: none"> • Geographic spread of jobs
Social impact	Social accessibility - how accessible is each sector to groups of workers who may experience wider economic exclusion?	<ul style="list-style-type: none"> • Gender balance
		<ul style="list-style-type: none"> • Disability access
		<ul style="list-style-type: none"> • Part-time workers
		<ul style="list-style-type: none"> • Ethnicity
		<ul style="list-style-type: none"> • Employment of under 25s
	Social mobility – how effectively does the sector provide opportunities for careers for people from non-professional families or are not graduates?	<ul style="list-style-type: none"> • Socio-economic access
		<ul style="list-style-type: none"> • Access for non-graduates
		<ul style="list-style-type: none"> • Non-graduate managers

Hospitality and the foundation economy have the highest social productivity

UK ECONOMY SECTOR	SPI RANKING
Hospitality	1
Admin and support services	2
Wholesale, retail, repair of vehicles	3
Transport and storage	4
Households as employers	5
Arts, entertainment and recreation	6
Health and social work	7
Other service activities	8
Agriculture, forestry and fishing	9
Real estate	10
Construction	11
Public admin and defence	12

Case study – Visitor Economy Network Initiative (VENI)



“

”

We want to highlight all the opportunities in Suffolk and Norfolk's changing visitor economy - showing that it's much more than seasonal tourism and offers year round, highly skilled and well-paid employment.

Andrew Wheeler

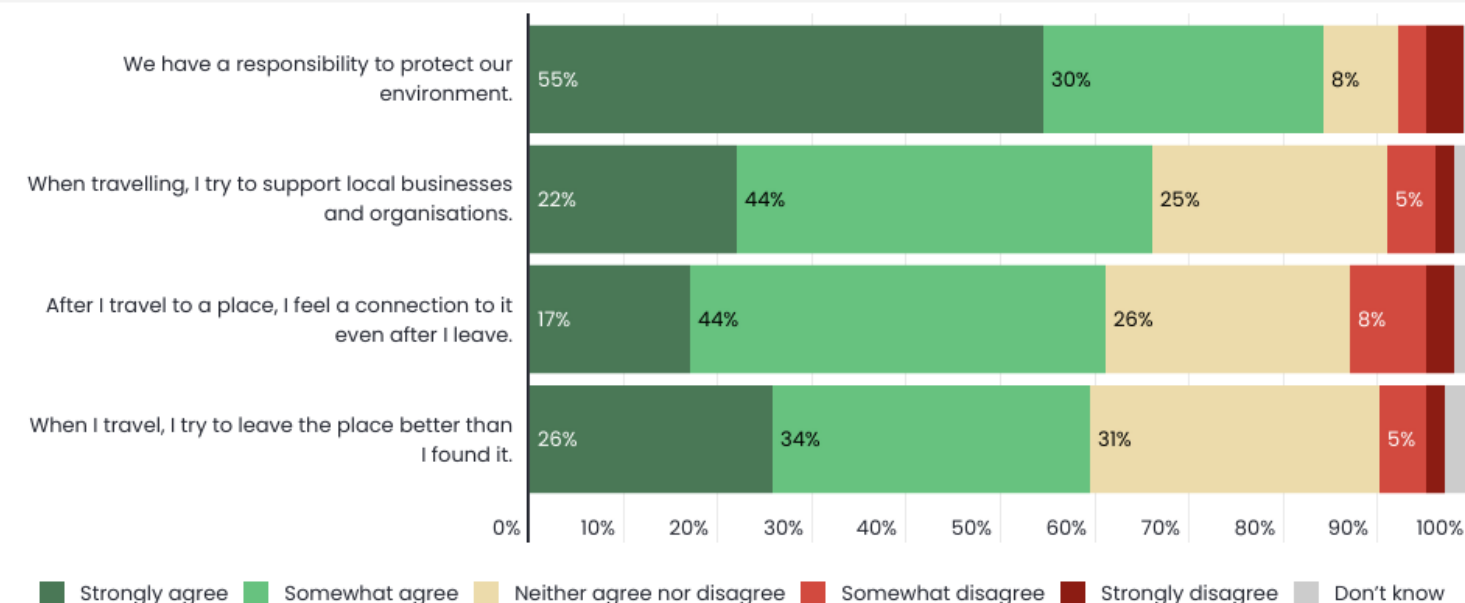
Executive Director - Curriculum Initiatives, Eastern Education Group

The public instinctively support the concept of regenerative tourism

Regenerative tourism is an approach which reimagines the tourism industry as a force for sustainability, inclusivity, accessibility, and genuine hospitality. Regenerative tourism aims to leave a place in a better condition than if it did not have tourism. Rather than maintaining or sustaining a place, regenerative tourism seeks to improve a place through tourism.

To what extent do you agree or disagree with the following?

Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct – 11th Nov 2024



Case study – The Wetlands and Wildfowl Trust



“The experiences visitors have on sites helps to fund our work but we also want it to inspire action and change from people for wetlands.”

Sarah Fowler

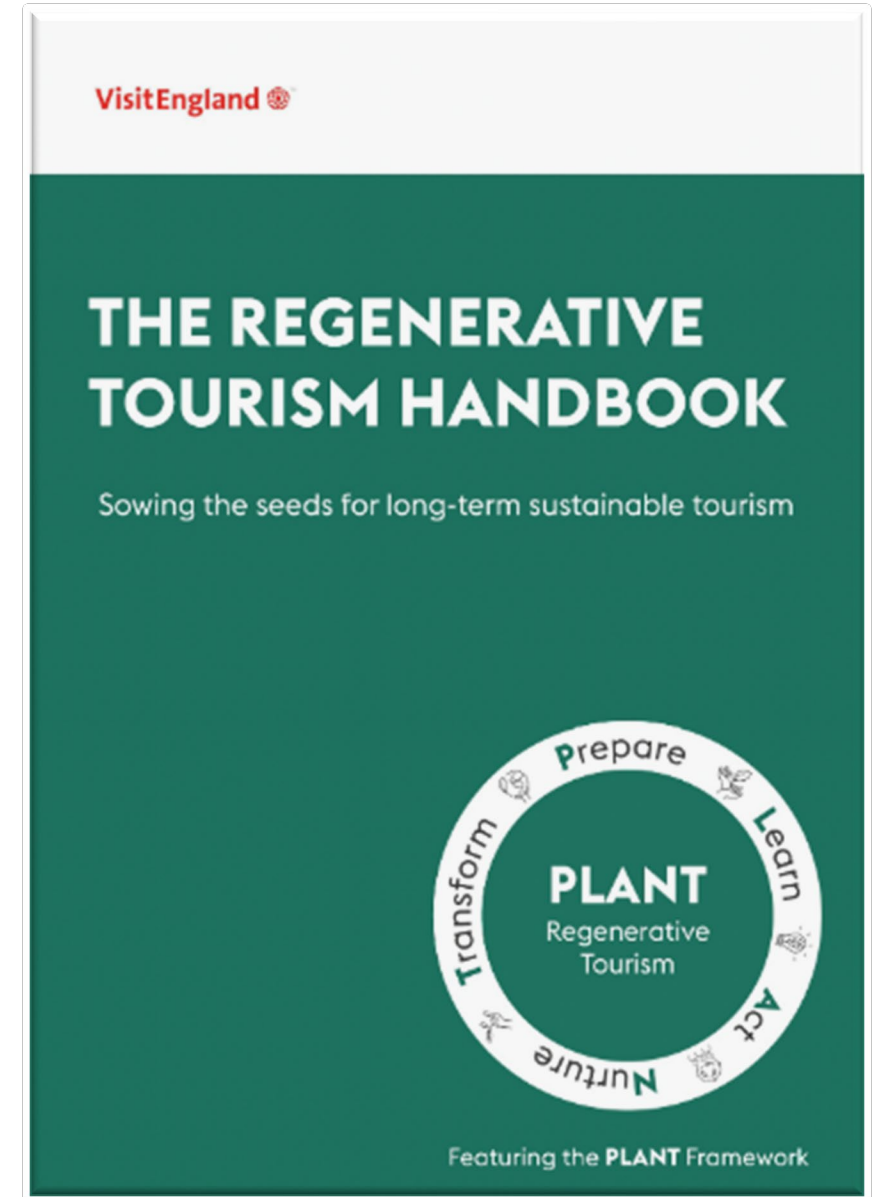
CEO, Wetlands and Wildfowl Trust

Additional insights for researchers!

- **Innovative Indices** – New measures for empowerment, cohesion, identity & regeneration
- **Robustness Checks** – Statistical testing to check patterns
- **Contrasting Approach** – Host vs. non-host communities to see the difference
- **Mixed-method Design** – Polling, case studies, datasets, & employment analysis combined
- **Limitations Acknowledged** – Causality challenges & uneven tourism distribution
- **Scalability** – Framework can be repeated over time

Communication and next steps

- **National Strategy development** – alongside Economic Value of Tourism
- **Government Webinar** - Influencing non-tourism government departments
- **Social Media** – on going communication of case studies
- **Regenerative tourism handbook** – practical ideas and inspiration
- **Regenerative tourism measures** – joint project with all tourism boards



Case study – North East Regenerative Tourism Framework



“

We want the framework to be a living document, which helps promote tourism for good here in the North East but also helps inform the work of others across the UK and the world.

”

Ian Thomas

Chief Operating Officer, Newcastle Gateshead Initiative



Full report:
<https://www.visitbritain.org/social-value-tourism>