england

A Strategic Action Plan for Tourism 2010-2020

BUSINESS TOURISM ACTION PLAN

Vision

To increase the value of England's business tourism market by 5% year on year by 2020.

Objectives

1. To maximise England's strong and competitive brand values in marketing it as a business tourism destination.
2. To leverage England's expertise in medicine/science, academia and industry to gain competitive advantage.
3. To ensure all England's facilities, products and services continue to meet market needs to increase England's competitive success.
4. To ensure the importance of business tourism maintains a high profile with public and private sector stakeholders.

What is Business Tourism?

Business tourism includes visitors participating in the following activities:

- Association/Charity/Institute/Society Events
- Governmental meetings & conferences
- Corporate Events – dinners, product launches, conferences, awards etc
- Incentive travel
- Corporate hospitality
- Exhibitions & trade shows
- Independent business travellers

Why take action on Business Tourism?

Conferences, meetings and other business events play a vital role in economic, professional and educational development in England by providing important opportunities to communicate, educate, motivate and network.

England leads the world in specialist areas of innovation such as biotechnology, digital media, genetics and nano-technologies. It also plays a pivotal role in finance, insurance and business services as well as having globally admired expertise in creative industries.

This specialist expertise enables England to develop conferences and meetings contributing £15 billion in economic impact in 2009, plus exhibitions and trade shows worth £7.4 billion and a further £1 billion each from incentive travel and corporate hospitality (Source:BVEP). Additionally, trade transacted at exhibitions and other business meetings is conservatively estimated to be worth over £80 billion. Meetings deliver a 12.5 to 1 return on investment directly to the organisation involved (Source:MPI).

The key target segments are international, national and regional association conferences, international, national, and regional corporate events, exhibitions and trade shows and incentive travel.

Business tourism in England is estimated to generate 28% of total overseas visitor spend and between 80% and 90% of total UK business visitor spend (Source:IPS). There are over 22,000 businesses in the sector, sustaining around 800,000 full time equivalent jobs and significant tax revenues (Source:BVEP).

England was in the top five countries for international association meetings from 1875 to 1999. Its position has now dropped to outside the top ten countries worldwide with England hosting just 286 international association meetings in 2009, compared to 720 in France (Source: Union of International Associations').

The volume and value of business tourism in England peaked in 2006, since then it has experienced a reduction of more than 25% for inbound overseas business trips and 6% for UK business trips. There is a clear challenge to halt England's reduction in global market share of international meetings and return business tourism to pre-recession levels of volume and value.

Increasing business tourism in England will improve the success of England as a place to do business and raise the profile of its destinations as 'knowledge capitals'. The urban renewal and regeneration of many towns and cities is, in part, generated by conference and meeting activity, helping to improve them as places to live, work and play.

Business visitors spend an average of £178 per day, over 50% more than the average spent by leisure visitors.

Event type	Expenditure per day
International associations	£364
National associations	£170
Corporate	£120
IPS Overseas business visitors	£131
UKTS business visitors	£105

Source: Delegate Expenditure Survey 2006 Visit Britain, IPS & UKTS

In addition to the direct benefits attributable to business tourism detailed above, business tourism complements and support overall tourism, providing business for accommodation suppliers in periods when there are fewer leisure visitors (mid-week, winter etc), supporting messages of a vibrant successful destination and through business visitors returning as leisure visitors in future, extending their business trips to stay on as leisure visitors or bringing friends and family with them on business visits.

Challenges and Opportunities

The key decision-making drivers that impact England's volume and value success and its ability to meet them are set out in the appendices *Business tourism sectors and drivers (1)* and *Key sectors and ability to meet market needs (2)* . These outline the necessary actions for increased performance with each sector that have led to the actions outlined on pages 4 to 9. Significant components include:

- Creating and packaging exciting programmes for incentives, taking advantage of England's excellent sporting and cultural opportunities;
- Promoting a 'joined up' approach between destinations, venues and suppliers to make the event organisation process more straight forward; and,

- Encouraging strong, proactive ambassador engagement at local, regional and national levels.

Actions on product and service will aim to improve the scoring of England's ability to meet market needs as shown, with the target of achieving 5 for each sector.

Research undertaken to inform the preparation of the action plan revealed the perceptions of England as a place for business visitors to be as follows:

Perceptions of England - positive	Perceptions of England - negative
Easy access and transport links	High costs and poor value for money
Good entertainment, shopping &social programme options	Inadequate range of hotel options (outside London)
Easy to organise events	Service not up to expectations
Good diversity of venues available	Lack of local and national government support
Safety and security for delegates	Telecommunications & technology not meeting market needs

The key challenges for increasing market share for England's meeting industry raised by meeting and event organisers are as follows:

Ranking	Challenge
1	(Ensuring) competitive pricing and value for money
2	Increased competition worldwide
3	England's economic growth and key industries
4	(The threats posed by) emerging markets
5	Staffing and skills shortages...affecting service levels

With these perceptions and challenges in mind, there is an integral relationship between the development of this Action Plan and other Action Plan areas associated with the Strategic Framework. Destination management, skills, accessibility and visitor information are fundamental to achieving growth in Business Tourism.

The Action Plan

Taking these challenges and perceptions into account, the Action Plan sets out the necessary tasks to return England's business tourism to previous levels of success, thereby increasing England's global competitiveness and benefitting the economy overall.

The Action Plan is intended to be dynamic so that it can be adapted regularly to suit changes in the UK and global economy. For 2011/12 the corporate sector offers more opportunity for growth than public sector and governmental meetings which will see reduced volume due to public spending cuts. Although predictions for growth in GDP are low for the next three years, individual industry sectors' growth varies each year and this will impact the volume of events organised. Many factors including product cycles, publication of new research, mergers and acquisitions and changes in communication style will all influence the characteristics of events. The association sector always has a longer lead time and is more resilient to market changes. For all sectors, actions will be responsive to maximise potential for England's destinations.

Objective 1: To maximise England's strong and competitive brand values in marketing it as a business tourism destination.

ACTION	LEAD PARTNERS (where appropriate)	PARTNER SIGN UP	OUTCOME OR SUCCESS MEASURE
Raising awareness of destinations across the whole of England i. The creation of the England Business Tourism Group (EBTG) for destinations across England that have identified business tourism as a key element of their economic growth strategy. This group will work with and alongside existing destinations groups (e.g. MIA Destinations group/Core Cities Group) to achieve some of the actions laid out below.	VisitEngland	Destination Management Organisations (DMOs); VisitEngland; Meetings Industry Association (MIA); Core Cities	Creation of English Business Tourism Group.
a) Identify destinations targeting international markets (by sector) and ensure these destinations (and suppliers within them) are represented internationally. Map industry sales & marketing to gain clear picture of which markets are being targeted by English suppliers, any gaps, opportunities for improved activity.	VisitEngland; EBTG		Production of a portfolio of international sales and marketing opportunities to be carried out by VE and partners.
b) Support destinations and their suppliers with themed England-wide PR stories and research in the UK domestic market.	VisitEngland; EBTG		Production of an ongoing list of England-wide PR themes
c) Ensure clients are given the opportunity to experience destinations across the whole of England through regular, well organised, focused client familiarisation trips.	VisitEngland; EBTG; DMC Group (see below)		Production of Familiarisation trip programme
d) Encourage business visitors to extend their stay in England, return as leisure visitors in future or bring family and friends on business trips to experience England's leisure product through effective promotions and packaging of product.	VisitEngland; EBTG		Production of a Business Extender plan including business extender content on both enjoyengland.com and meetengland.com and toolkit for destination partners to use
e) National research requirements.	Interboard (England needs supplied by EBTG)	Industry Associations; Business Visits and Events Partnership (BVEP); VisitEngland	Prioritised List of National research requirements.

ACTION	LEAD PARTNERS (where appropriate)	PARTNER SIGN UP	OUTCOME OR SUCCESS MEASURE
f) Promote a 'joined up' approach between destinations, local government, venues and suppliers to make the event organisation process more straight forward. DMO's will be encouraged to operate in the best interest of their destination rather than a one-size fits all approach.	MIA Destination Group		Production of toolkit to enable destinations to achieve "joined up" destination approach.
ii. Set up England Destination Management Companies Group (*DMCs are organisations that manage and organise events and meetings) to be chaired at national level which meets around the country as mini-familiarisation trip; discuss issues such as perceptions, challenges, new products (particularly incentive), sharing best practice where appropriate. Create and package exciting programmes for incentives in destinations outside London, taking advantage of England's excellent sporting, cultural and entertainment opportunities and creative skills.	VisitEngland	Destination Management Companies; DMOs; Venues ; Transport Operators	Creation of 5-6 realistic incentive programmes (including maximum 1 from London) that can be promoted by VisitEngland, DMC's and destination/venue partners Development of portfolio of sales and marketing opportunities to promote newly created incentives
Improve England's competitiveness through branding -Portray England consistently with strong brand messaging iv. Portray England as modern progressive destination as well as traditional historic assets. Brand messaging to reflect the dynamism, creativity and innovation side of England as well as the traditional - vital to helping England to compete internationally (including against Scotland and Wales). Follow through strong brand messages for England with common messages across the country – access, value, quality & reliability, innovation / creative ('hothouse for ideas'), wise growth, food & drink, heritage & history – creating a national brand toolkit.	VisitEngland; EBTG	All suppliers	Clear branding strategy and toolkit which can be used by suppliers across country to portray consistent message of England in both domestic and international sales & marketing
iiv. Ensure we have strong channels for sending these messages both domestically and overseas through a well researched database with up to date appropriate contacts, strong representation at trade fairs, workshops, sales missions, telemarketing, PR and advertising, online / website / social media.	VisitEngland; EBTG		Production of a portfolio of international sales and marketing opportunities to be carried out by VE and partners
Improve England's competitiveness through value perceptions iiiv. Review success of London's Olympic pricing charter to establish potential for future pricing charters nationally, locally or for specific events.	MIA Destinations Group	DMOs	Understand feasibility of a charter. If so, produce guideline/ template.

ACTION	LEAD PARTNERS (where appropriate)	PARTNER SIGN UP	OUTCOME OR SUCCESS MEASURE
ivv. Review pricing models from convention centres and convention hotels to ensure promotion of value added and encourage further value added offers, in particular free WiFi.	ELCG	DMO's/Convention Centres/Convention Hotels	Best practice pricing model clearly communicated to customer.
vv. Promote good value offer in many destinations to change perceptions of England as a high cost destination.		All suppliers	Clear value messaging incorporated into communications – part of branding strategy toolkit above.
Perception research on a regular basis to fully understand what buyers think of England viv. Carry out regular research at local and national level to understand buyer perceptions of England and its key destinations for ongoing testing and monitoring of all actions – ensure **coordinated** and **shared** market intelligence.	Industry Associations; BVEP; DMOs; Venues; Transport Operators; VisitEngland; EBTG to collate	Industry Associations; DMOs; Venues ; Transport Operators	Identify current programmes, scoping and costing new programmes to meet identified requirements

Objective 2: To leverage England's expertise in medicine/science, academia and industry to gain competitive advantage.

ACTION	LEAD PARTNERS (where appropriate)	PARTNER SIGN UP	OUTCOME OR SUCCESS MEASURE
i. Create working group of key destinations, professional services and government agencies (UKTI) involved in the development of specific target sectors and within that the attraction of Large Association/Corporate Conferences – England Large Congress Group (ELCG).	ELCG	VisitEngland; DMOs; UK Trade and Investment; Professional Conference Organisers'	Creation of group.
ii. Investigate viability of national ambassador programme for high profile ambassadors from industry, medicine/science, academia and public organisations to encourage conferences, meetings and events for England.	ELCG	ELCG	Paper on viability of programme and how it would link to local programmes.
iii. Identify which destinations are researching ICCA and UIA databases across the country; ensure these databases are being fully utilised. - Encourage destinations to employ researchers or provide national researcher where appropriate.	ELCG	ELCG	Paper on viability of national programme and identification of optimum 'research' solution.

ACTION	LEAD PARTNERS (where appropriate)	PARTNER SIGN UP	OUTCOME OR SUCCESS MEASURE
iv. Explore possibility of national subvention 'pot' to be used for conferences that meet strict national criteria or city pots that have to fulfil certain national criteria – i.e. international conference or conference that may go to another country. Also national guidelines for evaluation and awarding of subvention. Feedback suggests lengthy processes lead to England losing out to other faster reacting countries.	ELCG	ELCG; Convention Centres	Clear guidelines for use of national and local subvention.
v. Investigate scope for working with UKTI and similar organisations to develop sector specific marketing plans and for UKTI to support initiatives in this area – e.g. sector specific sales missions, attendance at trade shows or workshops, sector specific familiarisation trips, PR in sector specific publications.	ELCG	ELCG; UKTI; other government departments as identified	Common objectives identified and actions aimed to achieve objectives.

Objective 3: To ensure all England's facilities, products and services continue to meet market needs to increase England's competitive success.

ACTION	LEAD PARTNERS (where appropriate)	PARTNER SIGN UP	OUTCOME OR SUCCESS MEASURE
i. Identifying gaps in infrastructure such as large convention hotels, convention centres (reinvestment), transport (e.g. high speed rail links), iconic landmark buildings that create sense of place – Produce report outlining strengths, weaknesses, opportunities and threats to include the specific issues below.	EBTG	DMOs	List of key infrastructure requirements and approximate costings.
a) Encourage national government to reduce the barriers to entry for overseas business events visitors; make visas easier and cheaper to acquire, reduce air passenger duty etc.	DCMS; BVEP; British Hospitality Association	BVEP; Government	
b) Ensure technology and telecommunications are meeting market needs and remaining competitive including free Wifi and readily available broadband throughout the country.	MIA Destinations Group as part of 'best practice' toolkit	DMOs; Venues; Transport Operators	Shared best practice – MIA produced 'destination toolkit' leading to world class technology and telecoms.
c) Ensure destinations have necessary intelligence to encourage better transport connections, in particular regional airports, rail and coach. Promote ease of transit from London to other parts	MIA Destinations Group as part of 'best practice' toolkit	DMOs; Transport Operators	Shared best practice - MIA produced 'destination toolkit' leading to Improved connections.

of the country.			
d) Skills and training – promote professional qualifications and Institute of Event Management, encourage CMP nationally and raise awareness of business tourism expectations for hospitality generally.	People 1st ; BVEP, Institute of Event Management	DMOs; Venues; Associations	Creation of Institute of Event Management
e) Promoting Quality by continuing to support MIA AIM scheme; with initiatives to encourage more venues to sign up and also to include messages in marketing to raise awareness amongst buyers of scheme.	MIA	MIA; National Tourist Boards; DMOs; Venues	Increased sign up to scheme and widespread recognition.
f) Provide intelligence and best practice to encourage accommodation providers/suppliers to improve quality to meet market needs.		All suppliers	
g) Sustainability – Supporting BS8901 and ISO2012 and promotion of environmental and CSR activities. Promote England as the home of sustainable events – based on our history in supporting/winning business and bids with strong environmental credentials and the fact that we helped create the first standard BS8901. Promote awareness of sustainability issues and the benefits or implementing sustainable initiatives within industry and for all staff representing England. Ensure English business tourism industry benefits from knowledge gained from using IS02012 for Olympic Games and utilise intelligence from post England 2018 FIFA World Cup environmental sustainability advisory board. Ensure 'wise growth' principles run through all new developments.		All suppliers	tbc
h) Accessibility –Promote national standards for disabled access to venues.	Tourism for All ?	All suppliers	
i) National Welcome Scheme – with template for cities to follow. Ensure business tourism needs are incorporated into wider "Welcome Plan" – (also political engagement to ensure high profile figure present at opening of large events).	MIA Destinations Group as part of 'best practice' toolkit	All suppliers	MIA Destination Toolkit for best practice "business events" welcome.
j) Investigate national partnerships with key suppliers to industry e.g. train operators for discounts and special offers for UK delegates (note; BritRail pass for international delegates already exists).	VisitEngland; EBTG	All suppliers	Potential National partners identified and partnerships explored.

Objective 4: To ensure the importance of business tourism maintains a high profile with public and private sector stakeholders.

ACTION	LEAD PARTNERS (where appropriate)	PARTNER SIGN UP	OUTCOME OR SUCCESS MEASURE
i. Continue to support strengthening of Business Visits and Events Partnership (BV&EP) ensuring industry is fully engaged and contribute to this group.	BVEP	All members of BVEP	Continue to ensure that BVEP fully represents events industry.
ii. Promote the value and importance of business tourism at national and local level through regular updated research and effective channels of communication to clients, the industry, media, national and local government (eg; 'Britain/England for Events', All Party Parliamentary Group for Events, House of Commons Event)	BVEP	All members of BVEP	Communications Plan produced by BVEP. One piece of research carried out every 12-18 months.
iii. Develop a 'local government engagement' plan to promote the value and contribution the sector makes to the local and national economy to local government and local enterprise partnerships – this could include 'roadshows', development of case studies etc	BVEP	BVEP, MIA, VE, DMO's, Local Government/LEP's	

<u>APPENDIX 1</u>: Sectors for conferences/exhibitions for inward investment growth

The UK exhibition market -top sectors showing increased attendance and growth

1. Catering & food processing
2. Energy, power & water
3. Industry & manufacturing
4. B2B (business services)
5. Books/publishing
6. Retail(ing)
7. Broadcasting & computers
8. Creative industries

UK World leader subjects with potential for future events

1. Specialist Science e.g. Ultrasonic pharmaceutical particle engineering technology
2. Education
3. Importers of wine
4. Most monitored people on earth -security
5. Retail
6. Offshore wind power
7. Marine renewals

Which sectors suggest growth in future?

1. Creative industries, Art, architecture & design, marketing, media, film, photography, music & the arts, publishing
2. Renewable energy
3. Robotics
4. Biotechnology & specialist sciences
5. Electronic currency & finance
6. Education – distance learning – virtual universities
7. Security

Potential target sectors (conference and exhibition links)

1. Science and medical (including related technologies)
2. Business and financial services
3. Environmental technologies
4. Digital, media and creative industries
5. Transportation

Potential Growth in health (including alternative), retail, sustainability/environment, IT, natural and organic health, homebuilding/renovating, employee relations, business travel, design and engineering.

APPENDIX 2: Business Tourism Action Plan - Key sectors and ability to meet market needs

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The table below identifies the impacts and requirements of the different sectors and assessment of England's ability to meet these requirements currently.

Markets / Impacts	International association	National association	UK Corporate	International corporate	Incentives	Exhibitions
Delegate daily spend per head[1]	£364[1]	£170/461[1]	£120/459[1]	£459[1]	£459[1]	£16-£196 per day*
Average event duration	3 days	1.6 days	1.4 days	1-2 days	4 days	2.7 days (open)
Average size	552	340 to 400	129	129	58	10,331 visitors
Lead in time averages	2 years	16 months	3 months	6 months	12 months	12 months**
Origin of attendees	Worldwide	All over UK	Mainly local and regional (1½ hours journey)–	Europe Worldwide	UK Europe Worldwide	Local and regional
Requirements -Venue preferences						
Convention Centre	1	1=	3			1 (exhibition centre)
City Centre Hotel		2	1	1		
Out of town hotel		3	2	2		
University	3	1=				
Other	2		4		See note below	2
Accommodation preferences						
5-star	●	●	●	●	●	● (T)
4-star	●	●	●	●	●	● (T&C)
3-star	●	●	●	●		● (T&C)
Budget	●	●				● (T&C)
Other	●	●				●
England's ability to meet these needs from 1 to 5 when 5=all requirements met	**3/4**	**4**	**3/4**	**3**	**3**	**4**

[1]Figures from *Delegate Expenditure Survey September 2006* (UK National Tourist Boards) T&C =trade and consumer *varies for exhibitors and visitors

** Often several years simultaneously Not all incentives require a meeting venue but most often use luxury hotels, resorts or unusual venues