BIRMINGHAM VISITOR DESTINATION PLAN 2022-27

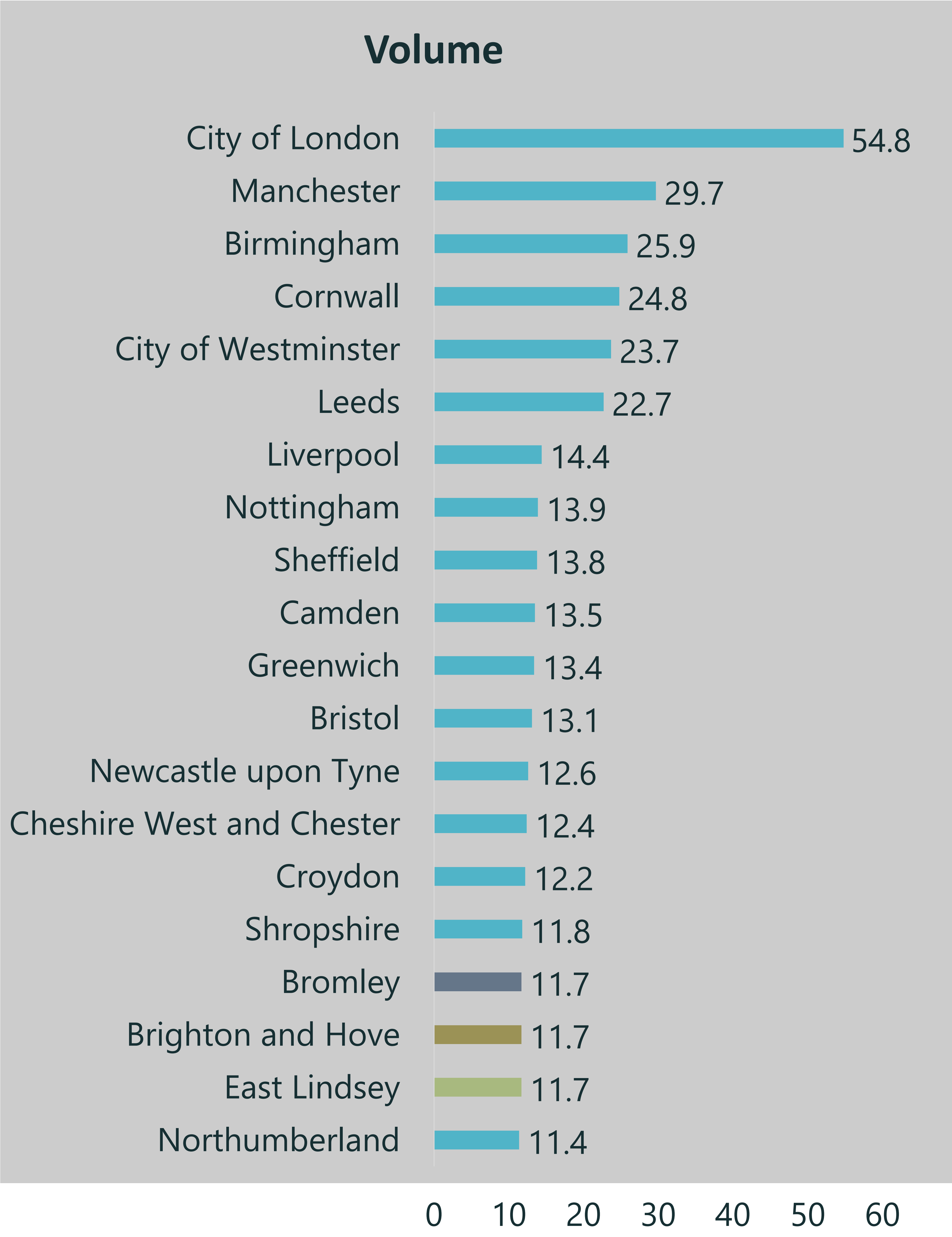
Market Research Report

Prepared by West Midlands Growth Company

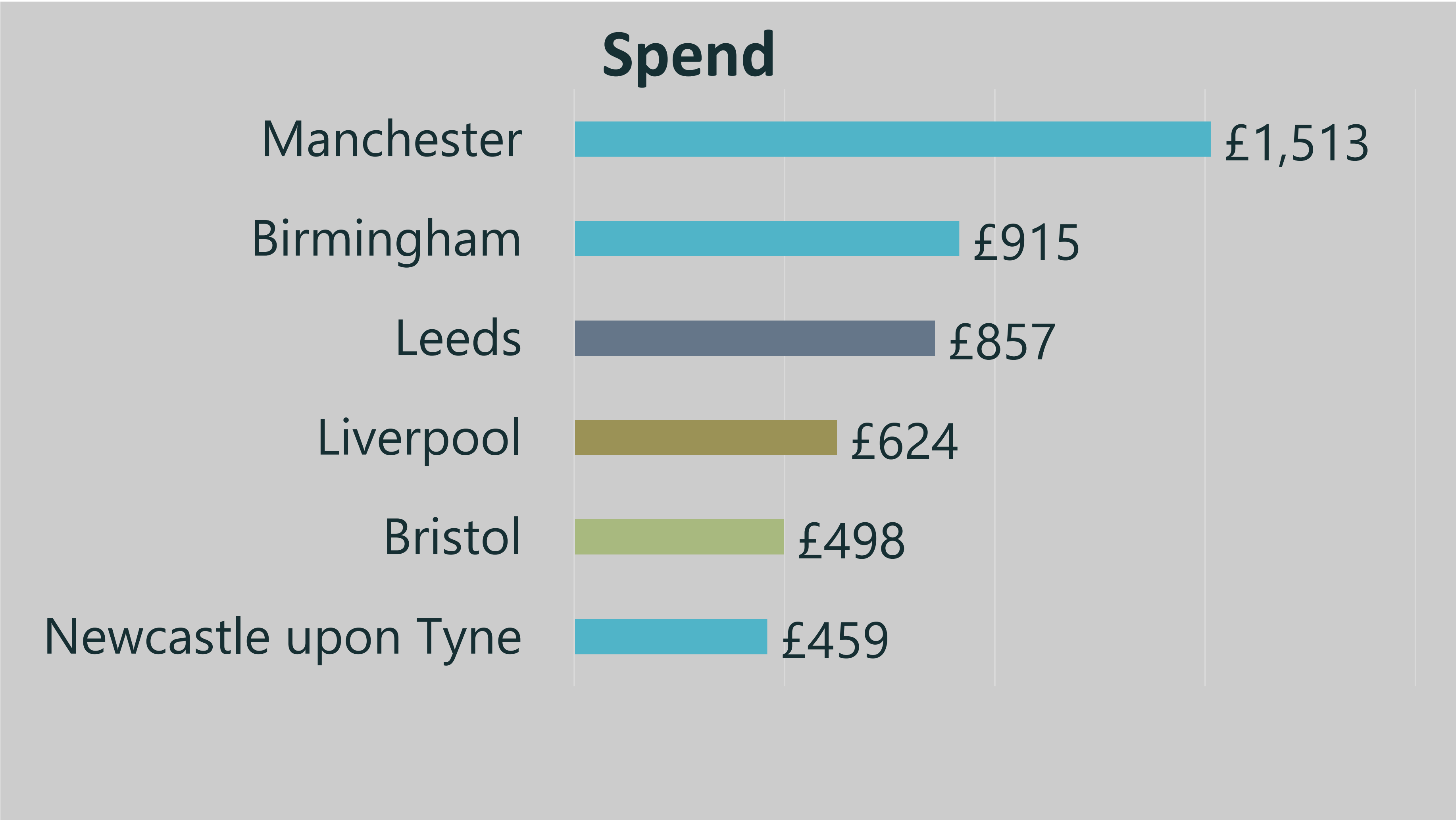
NATIONAL DATA

Volume of Tourism Day Visits and Expenditure 2017-2019 3 year annual average (millions)

Most Visited Local Authorities in England



Across England, Birmingham ranked 3rd highest in the number of tourism day visits, with only the City of London and Manchester receiving more day visits.

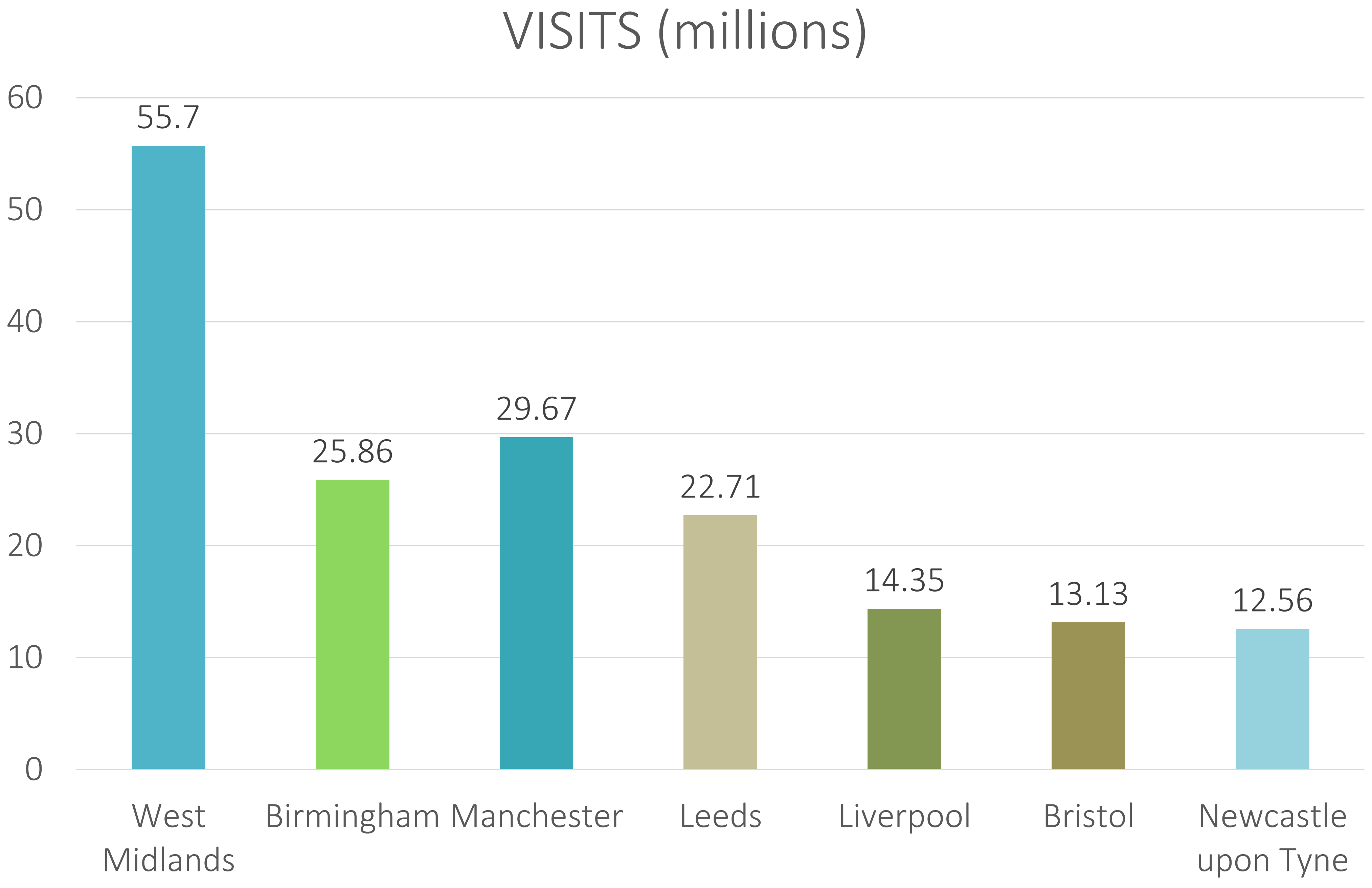


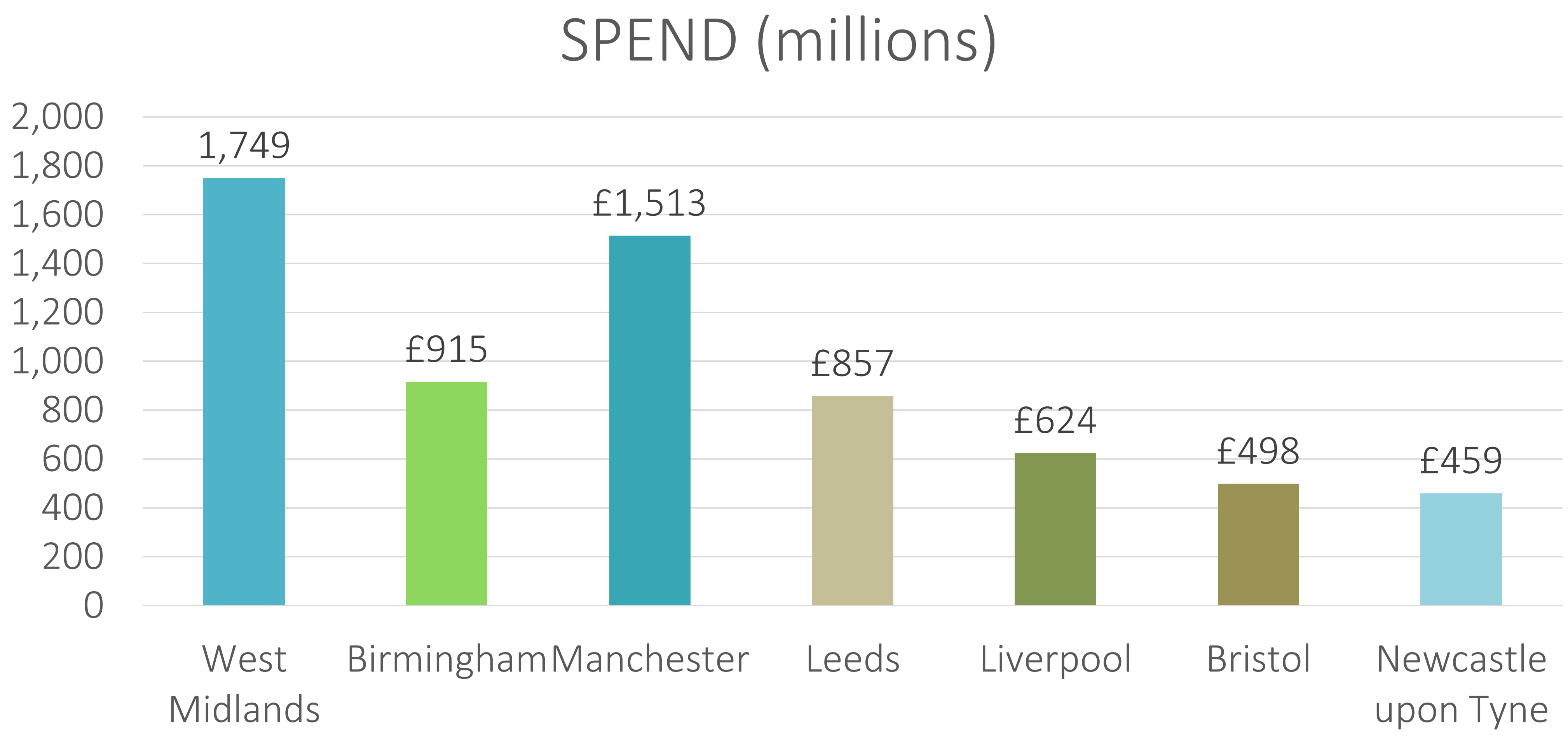
In terms of expenditure, Birmingham ranked 4th highest, with the City of London, Manchester and the City of Westminster achieving higher spend levels.

Source: VisitEngland - GBDVS & GBTS 3 year averages 2017-2019

Tourism Day Visits

TOURISM DAY VISITS



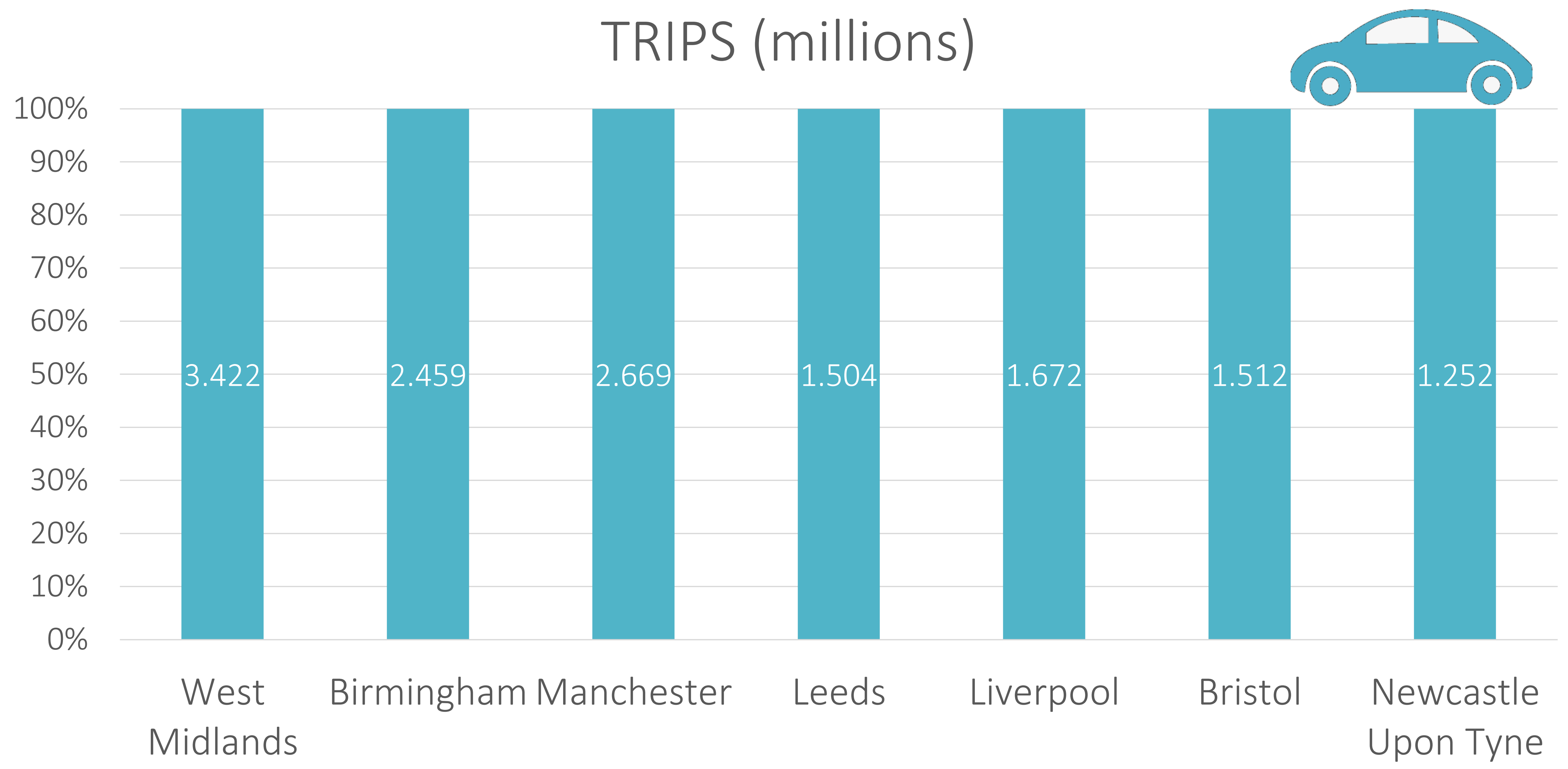


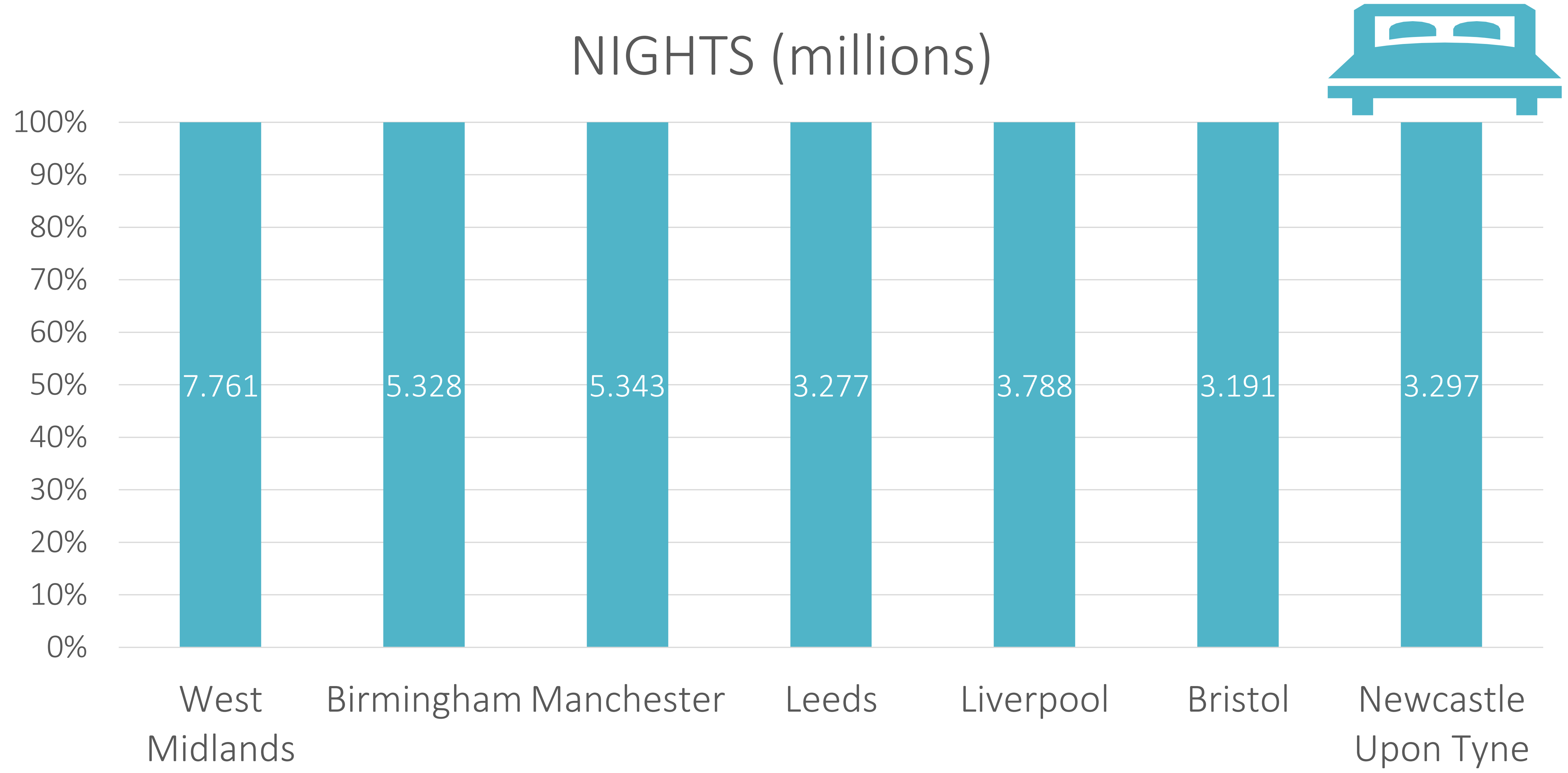
When comparing Birmingham to other major cities across England, Birmingham receives almost 26 million day visitors, second only to Manchester (c30 million). The West Midlands received over 55 million day visits with Birmingham accounting for 46% of all tourism day visits across the county as a whole.

Source: VisitEngland - GBDVS 3 year averages 2017-2019

All Overnight Tourism

ALL OVERNIGHT TOURISM





Source: VisitEngland – GBTS using 3 year averages 2017-2019

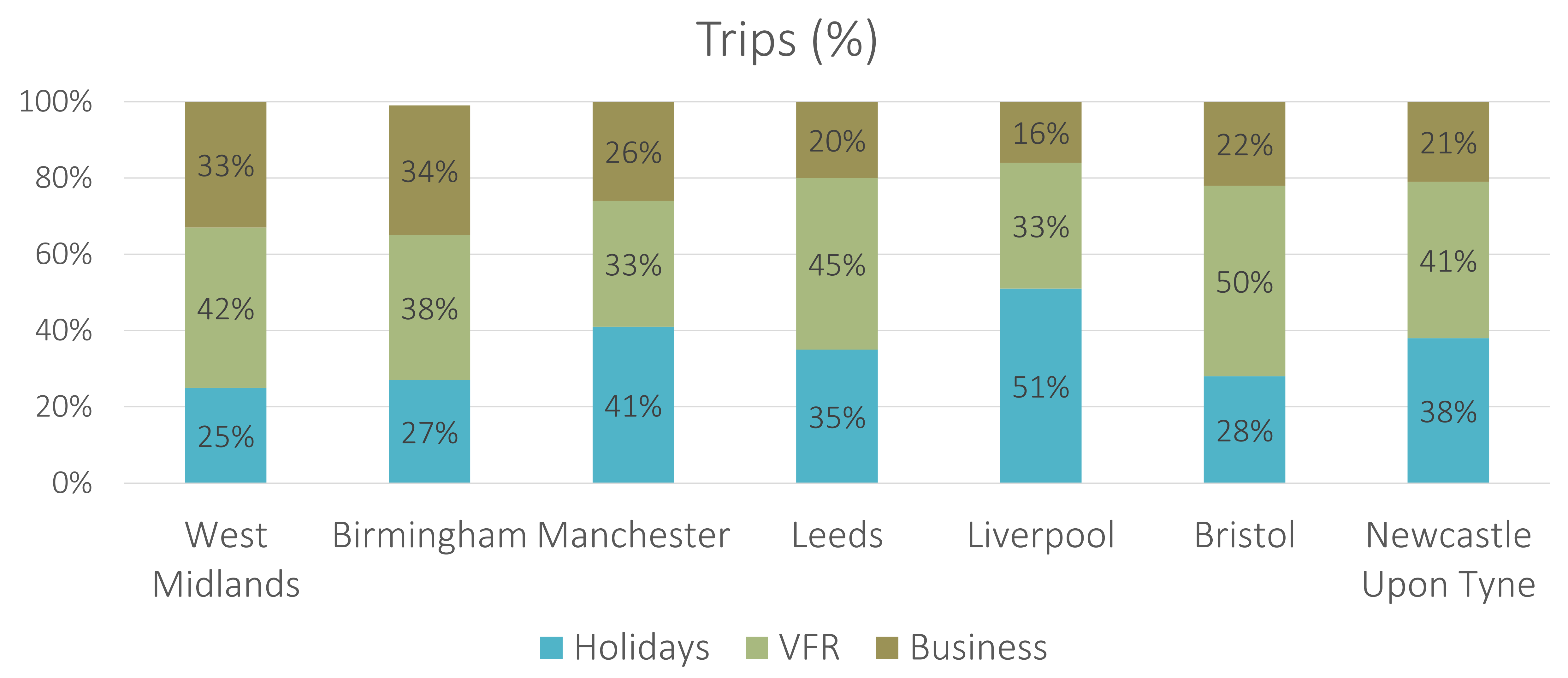
All Overnight Tourism

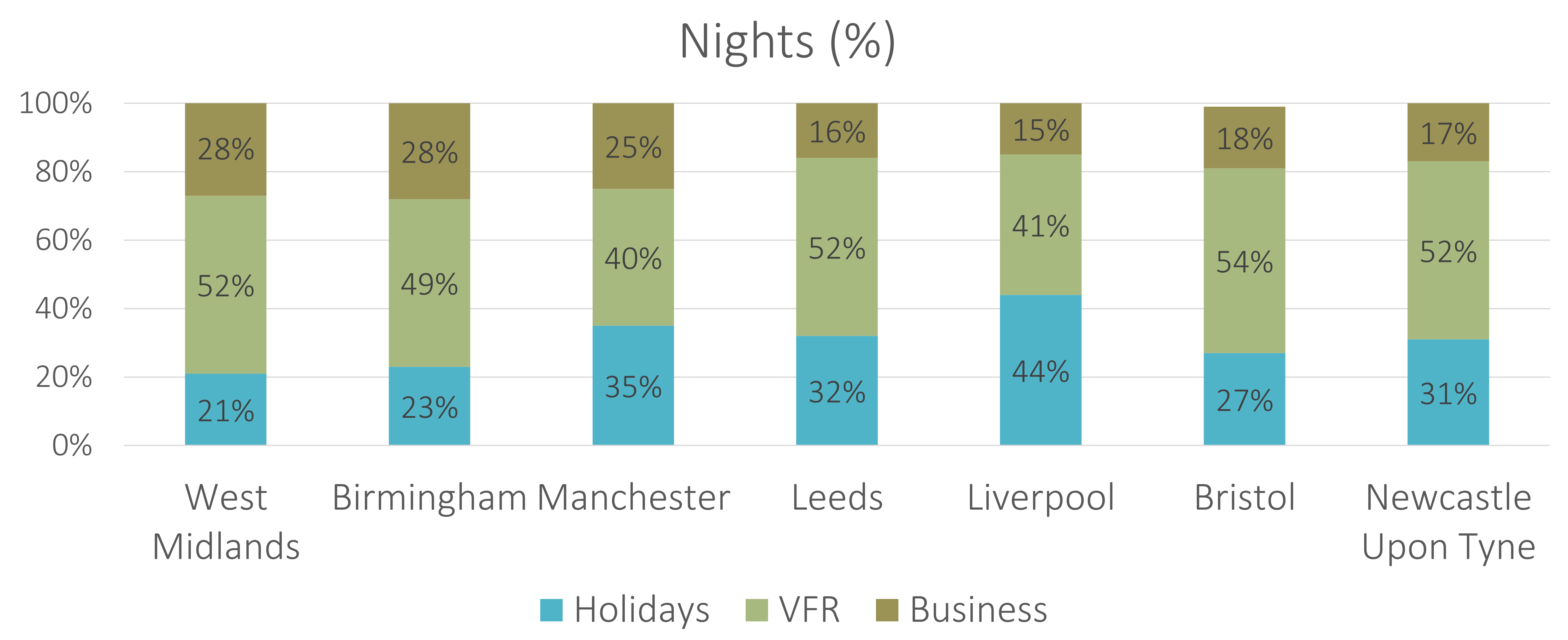
ALL OVERNIGHT TOURISM

Source: VisitEngland – GBTS using 3 year averages 2017-2019

All Overnight Tourism By Type

ALL OVERNIGHT TOURISM BY TYPE

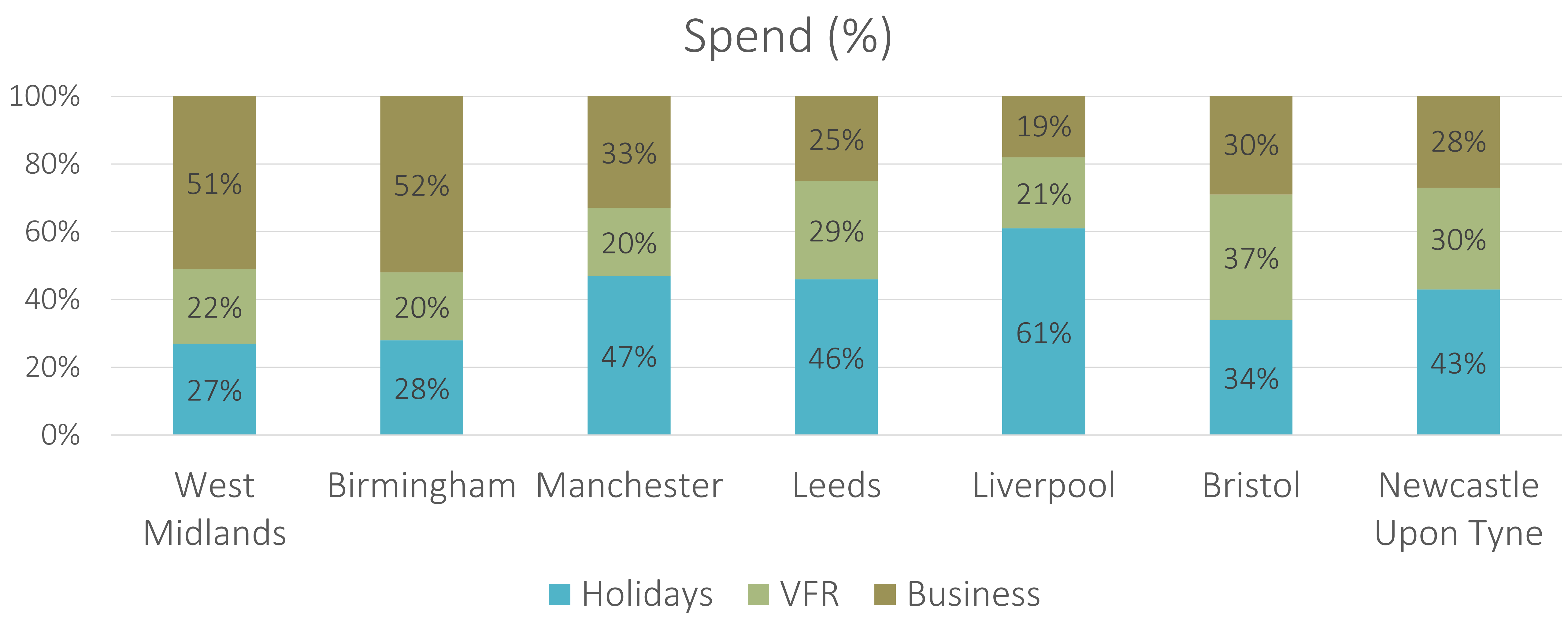




Source: VisitEngland – GBTS using 3 year averages 2017-2019

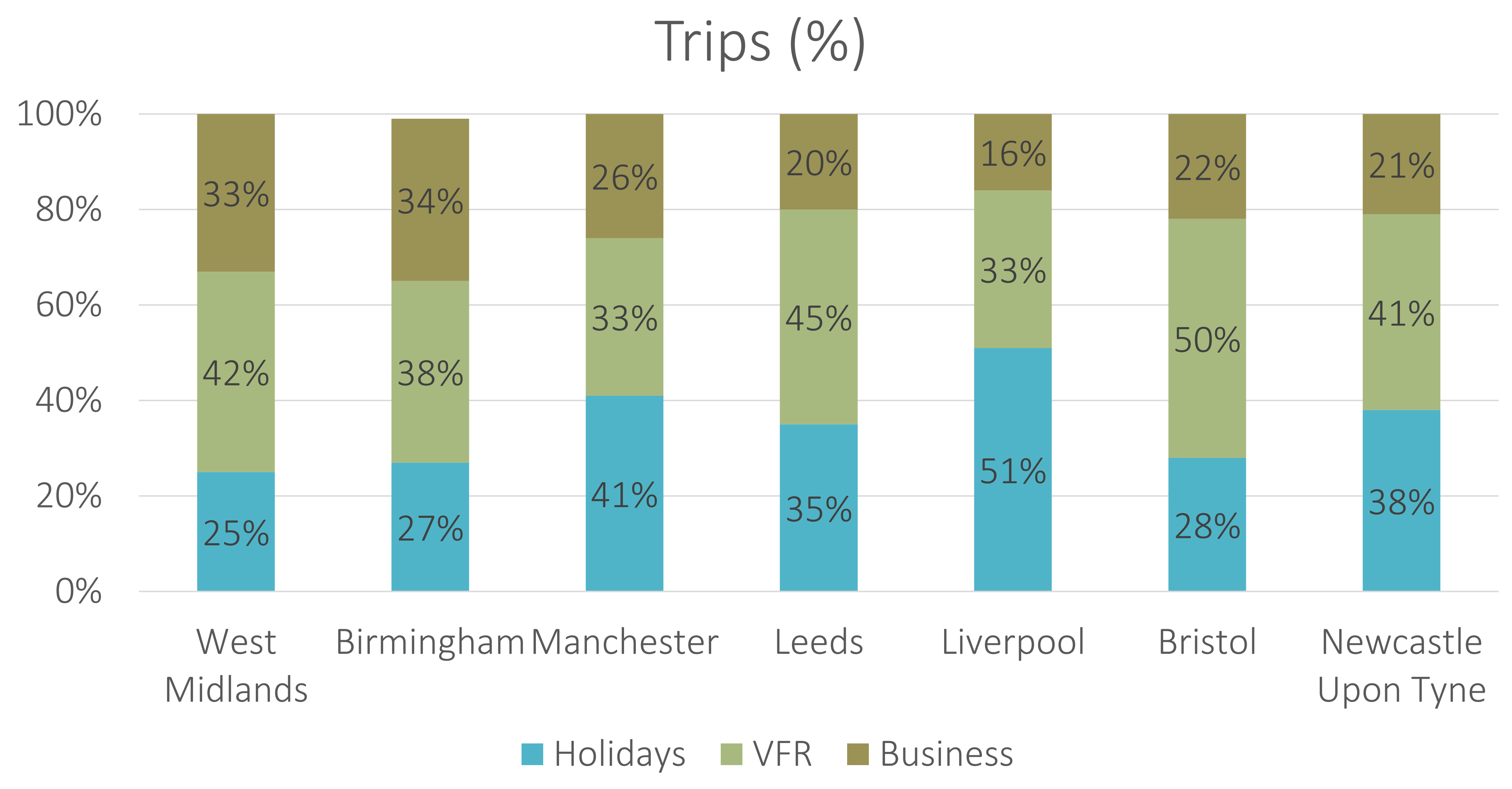
All Overnight Tourism by Type

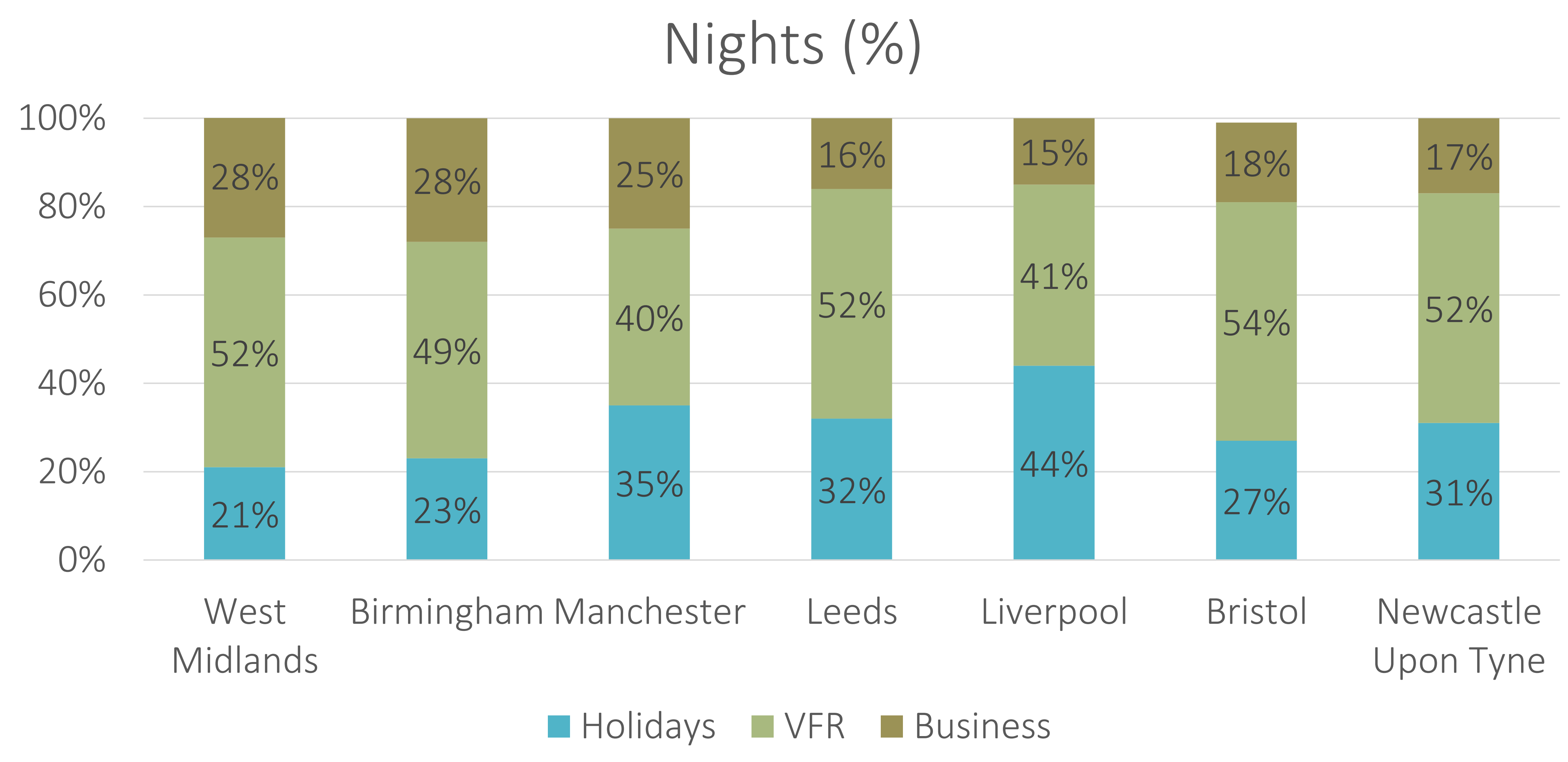
ALL OVERNIGHT TOURISM BY TYPE

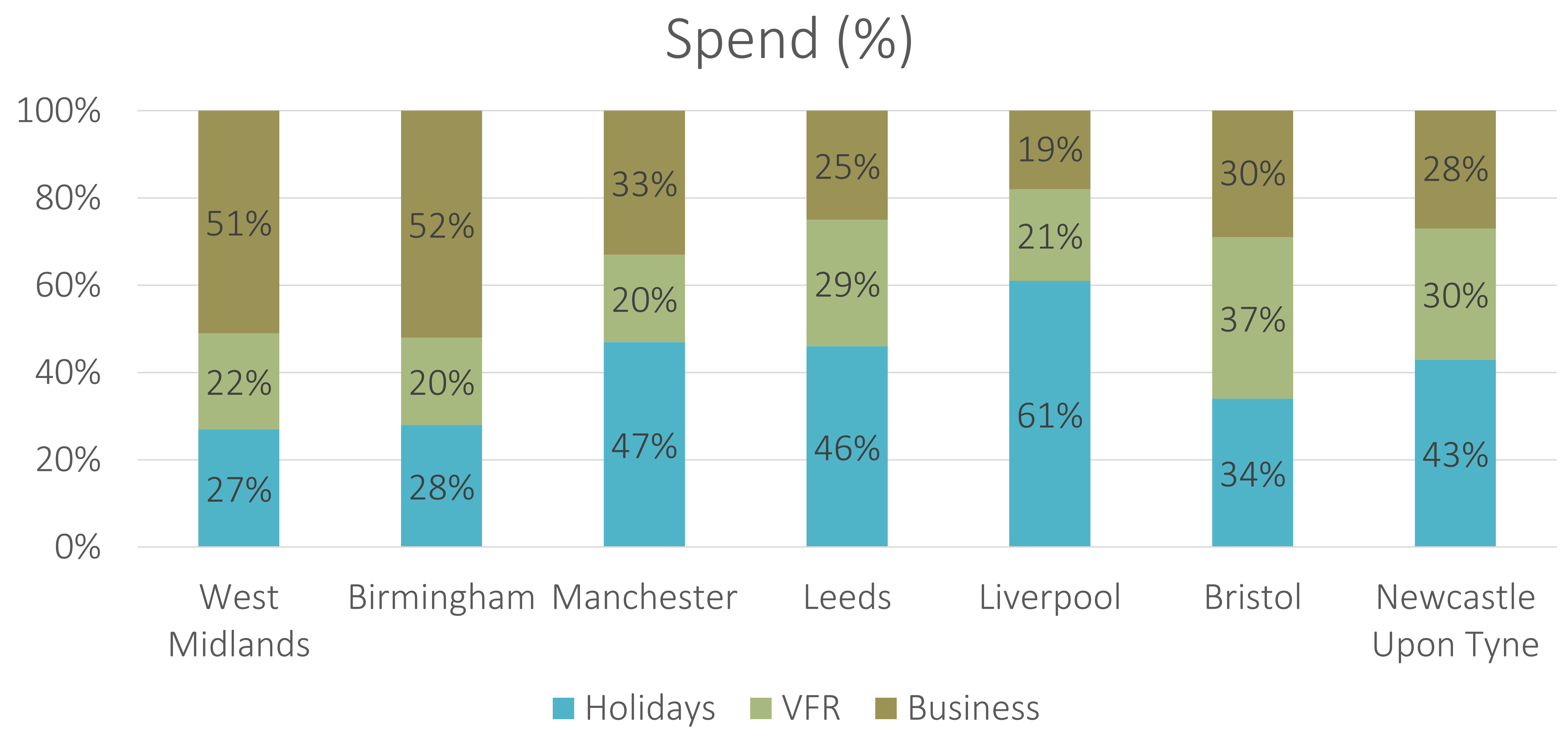


Source: VisitEngland – GBTS using 3 year averages 2017-2019

ALL OVERNIGHT TOURISM BY TYPE





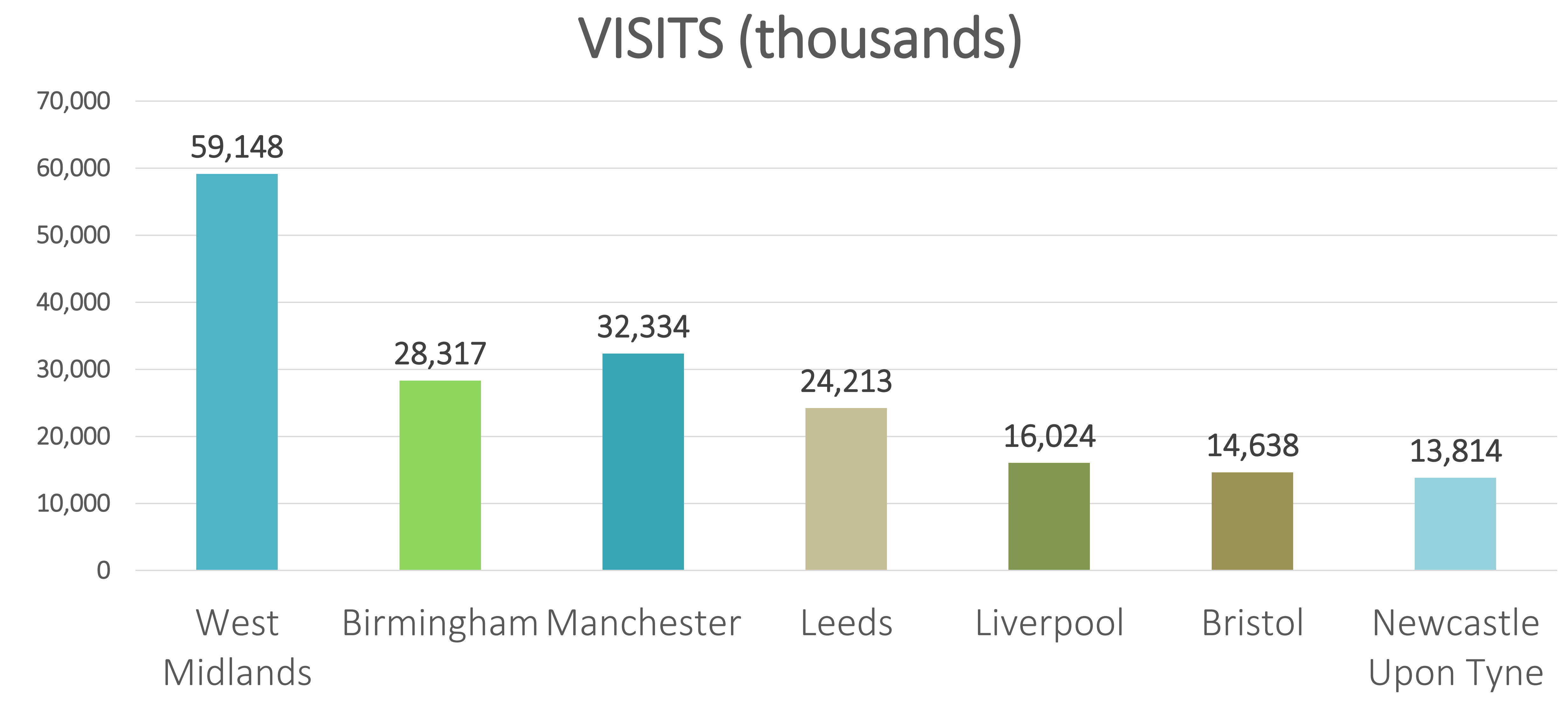


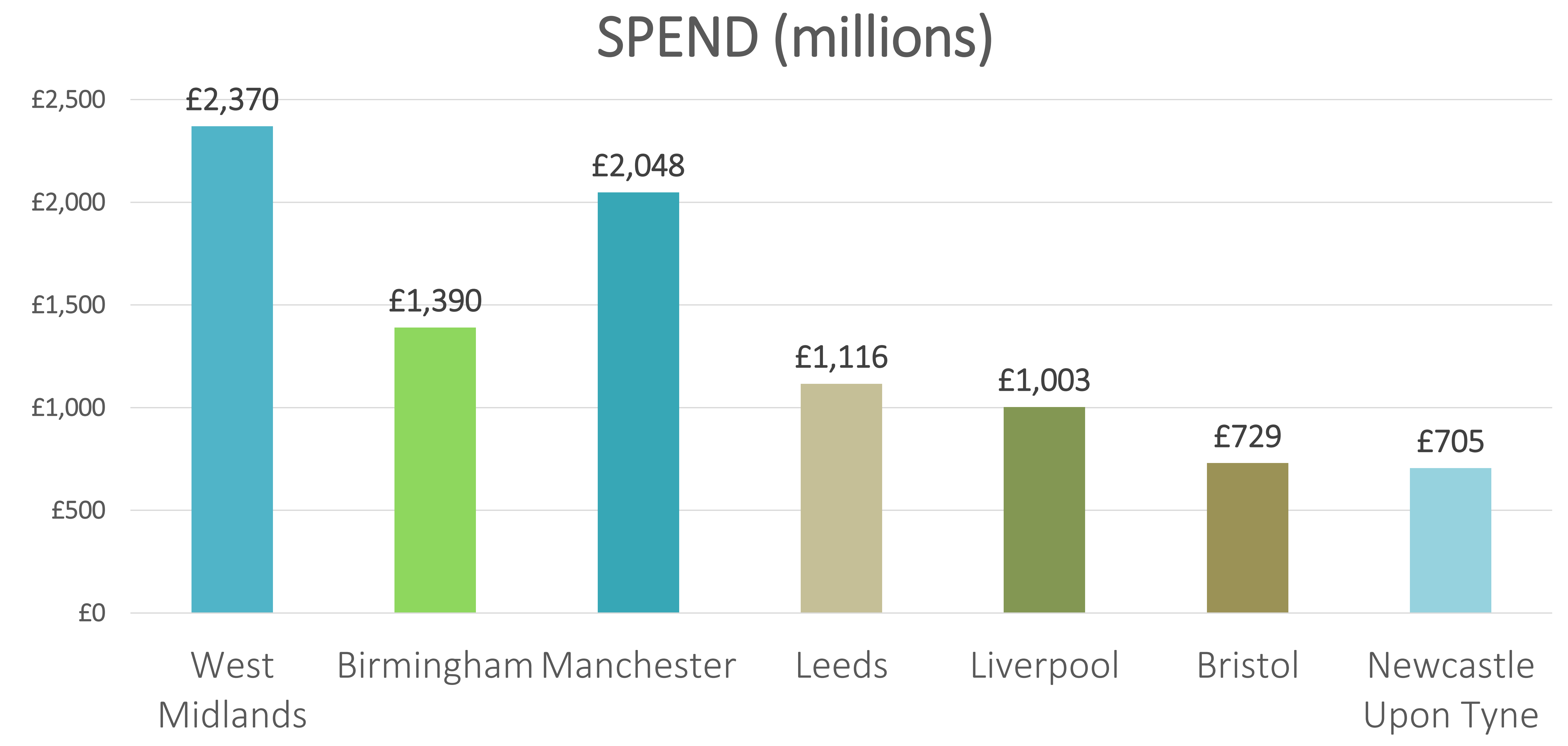
INSERT TEXT HERE

Source: VisitEngland - GBTS using a 3-year average 2017-2019

Total Tourism

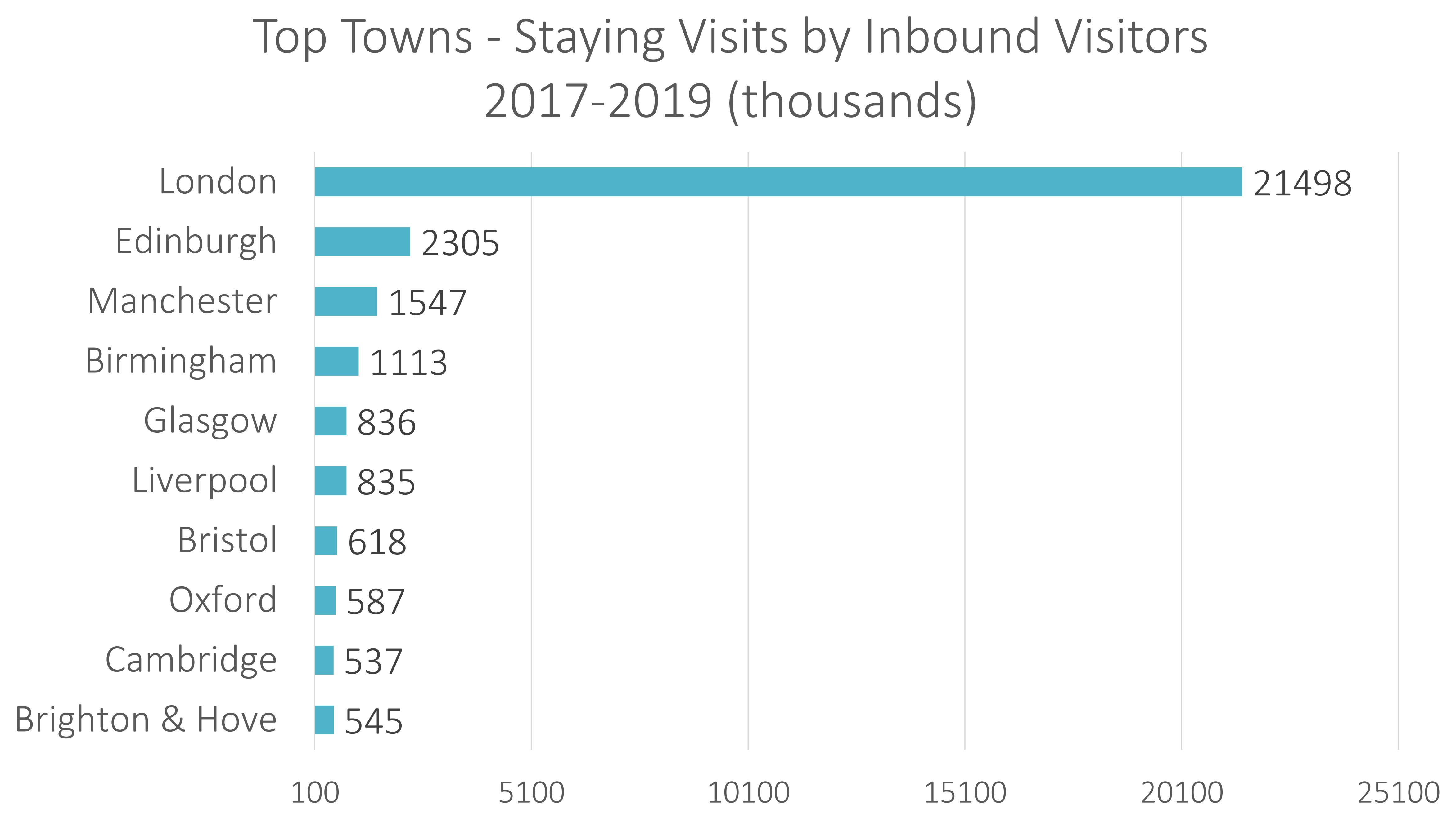
TOTAL TOURISM (DAY VISITS AND ALL OVERNIGHT COMBINED)





Source: VisitEngland - GBDVS & GBTS 3 year averages 2017-2019

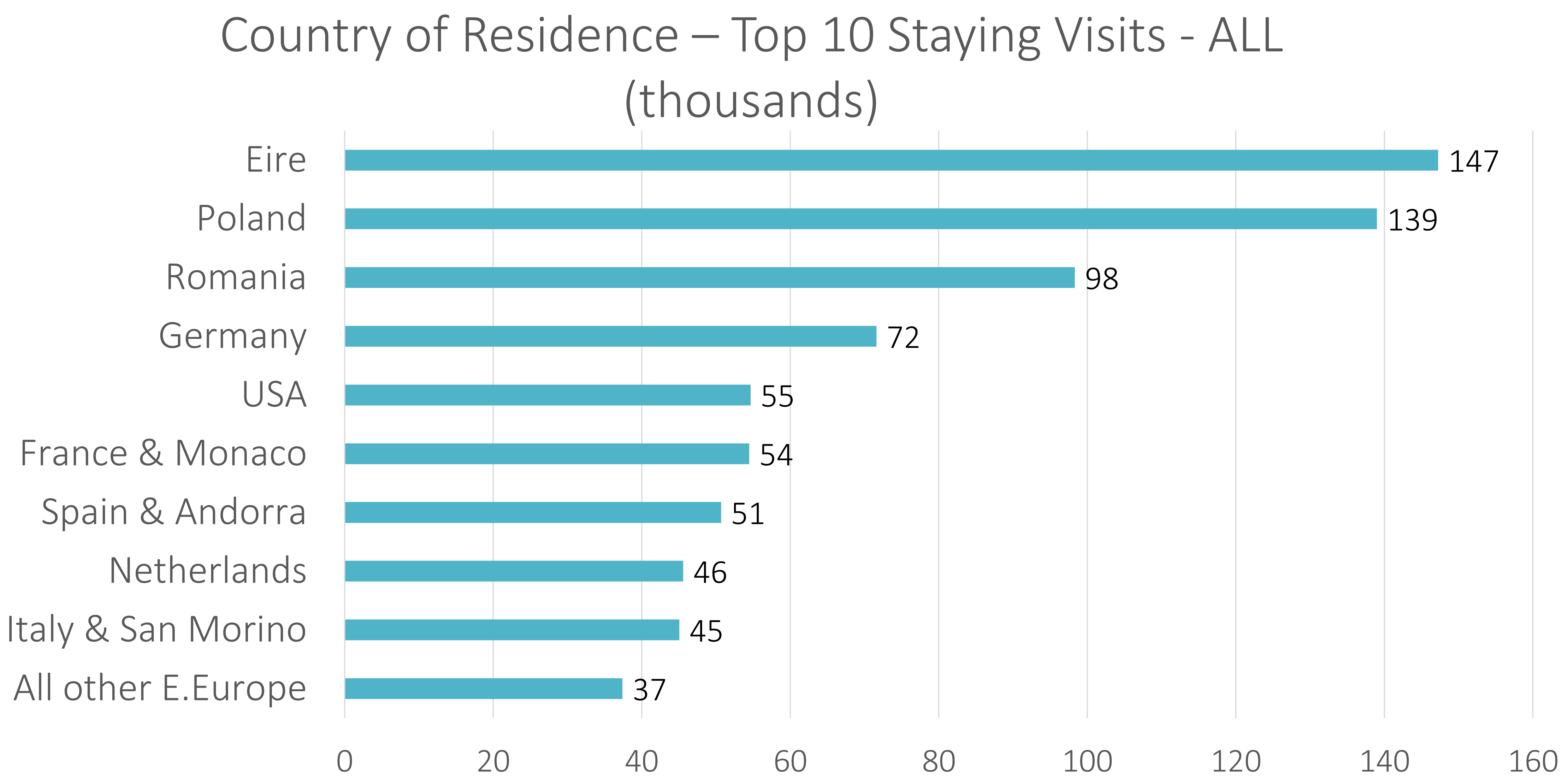
International Passenger Survey



- London is by far the top destination visited by inbound visitors to the UK with an average of almost 22,000,000 staying visits between 2017-2019.
- Birmingham is the 4th top town for international staying visits.

Source: VisitEngland – International Passenger Survey (IPS)using a 3-year average 2017-2019

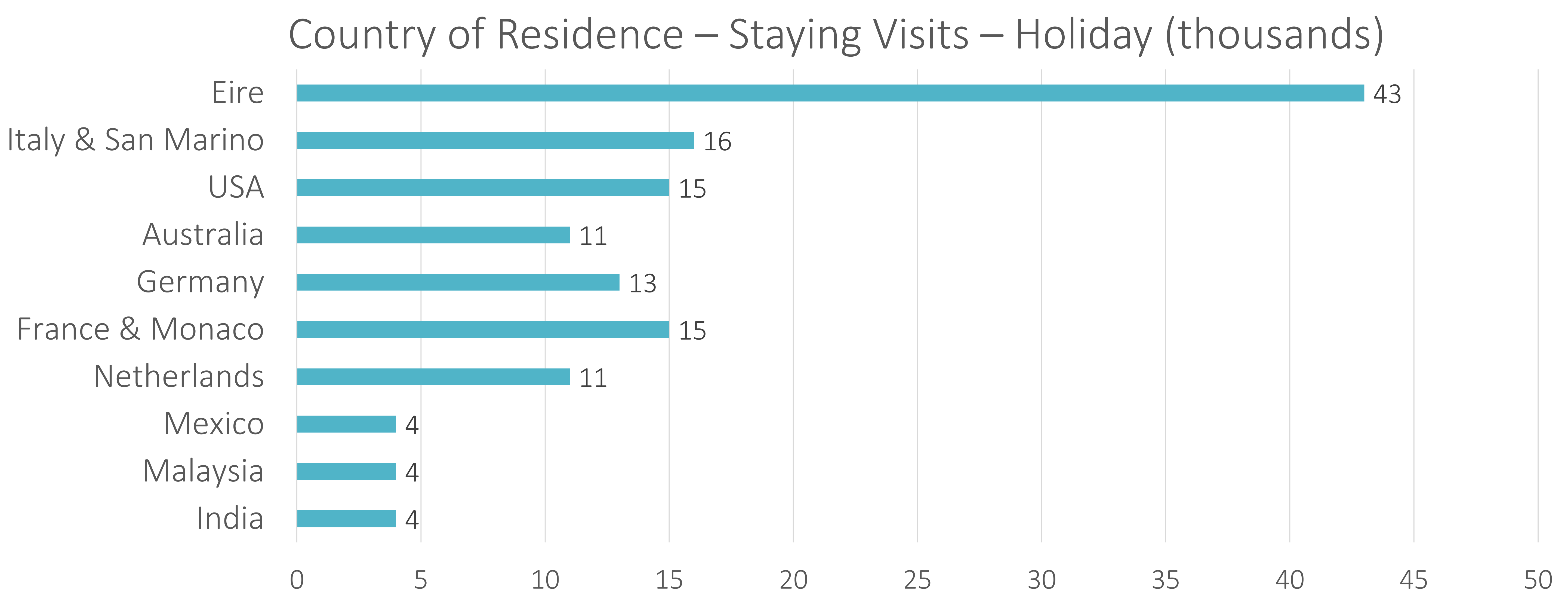
International Passenger Survey

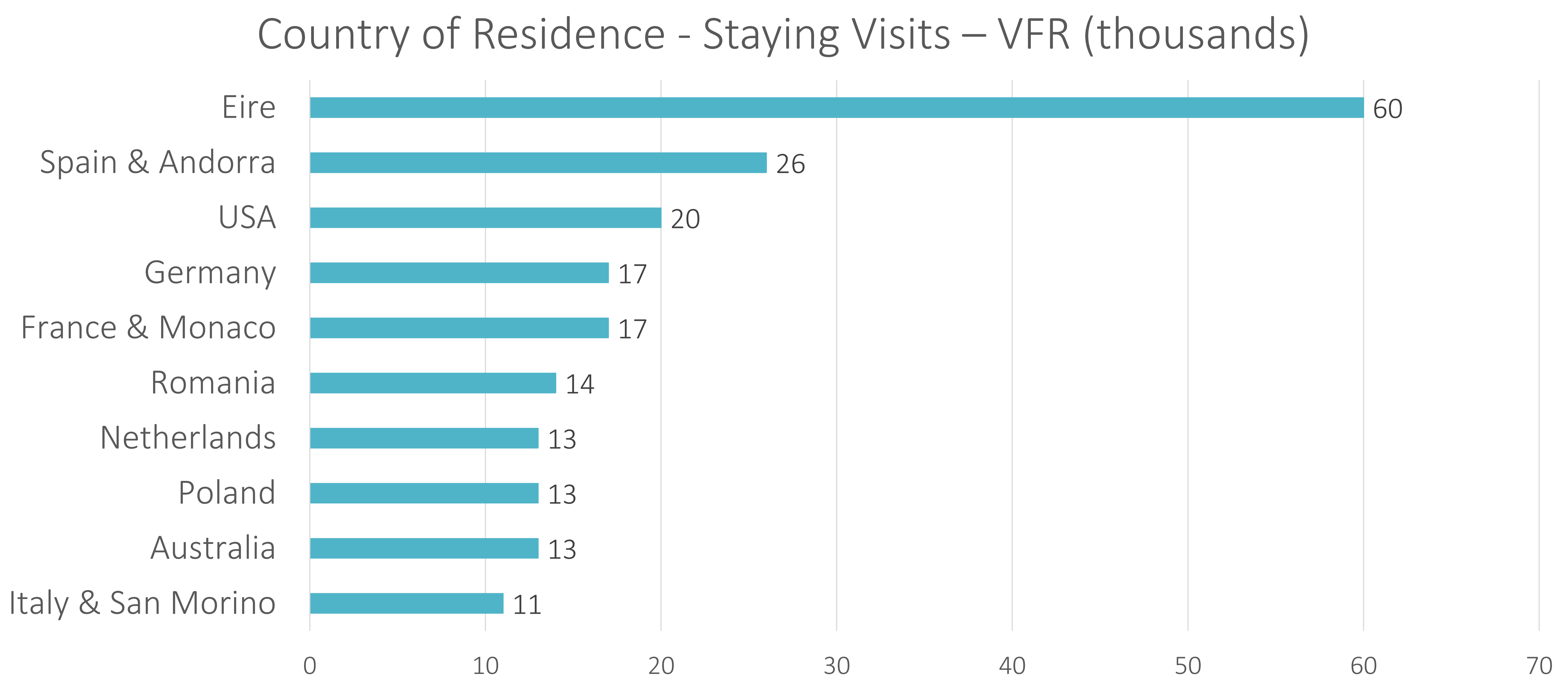


- Eire provides the top market to Birmingham with 147,000 staying visits on average over a 3-year period from 2017-2019, closely followed by Poland, 139,000.
- In the top 10, East European countries provide a 3- year average of 274,000 staying visits to Birmingham City

Source: VisitEngland – International Passenger Survey (IPS)using a 3-year average 2017-2019

International Passenger Survey

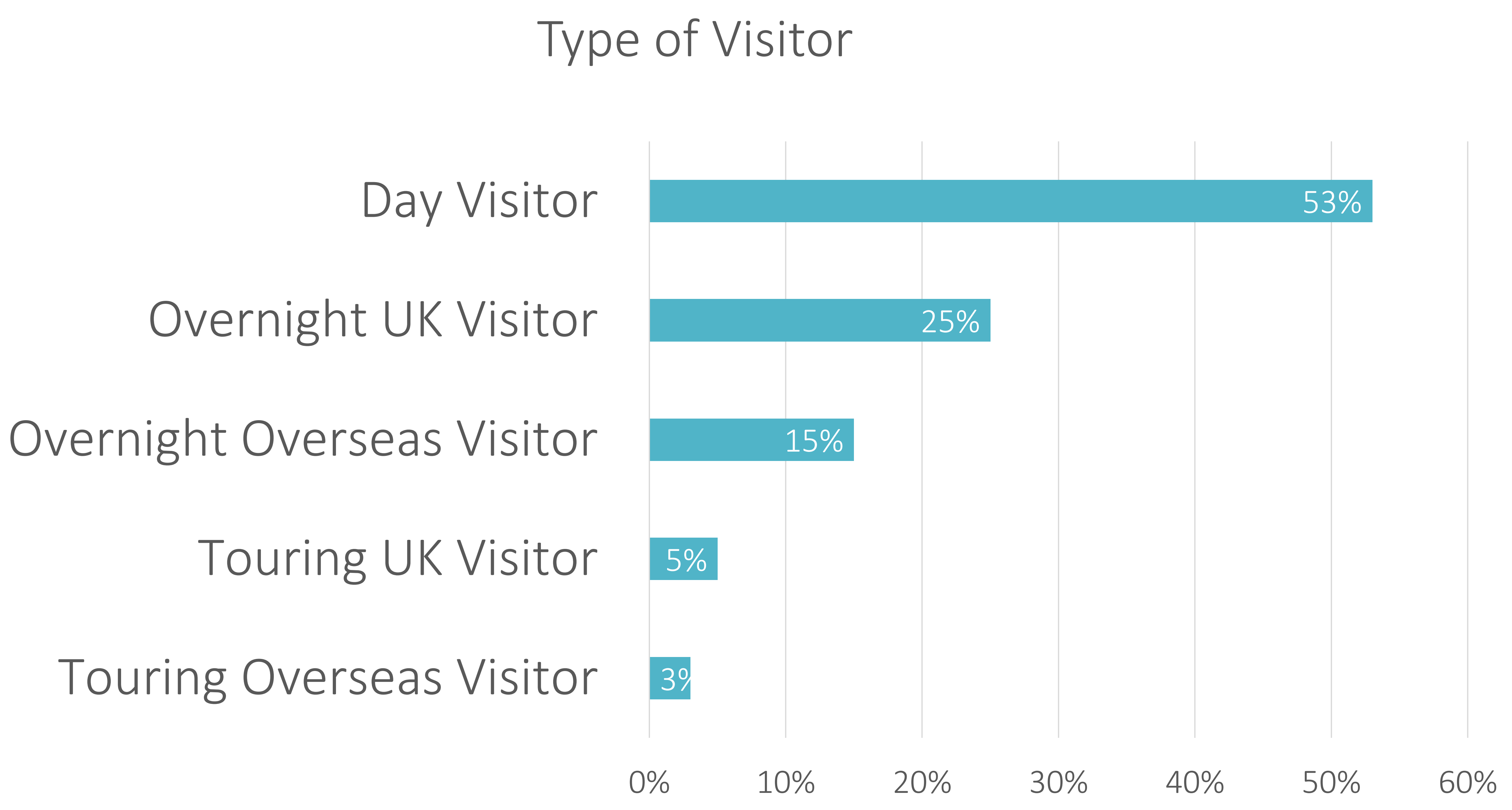




Source: VisitEngland – International Passenger Survey (IPS)using a 3-year average 2017-2019

Birmingham City Visitor Research

Type of Visitor



- Just over half of all visitors to Birmingham were day visitors (53%) with 5% domestic touring visitors, a quarter (25%) domestic overnight visitors, 15% were visitors staying from overseas and 3% were touring overseas visitors.
- Four out of ten (41%) of visitors were on a day trip from home and a quarter (25%) were on a holiday or short break, with the exception of business visitors who were in the City for a business visit staying overnight (66%).
- Three quarters of respondents had previously visited Birmingham (76%). Many visitors had visited Birmingham before with the City attracting a high number of day visitors, who live within an hour's drive time, which may account for the high levels of repeat visitors.

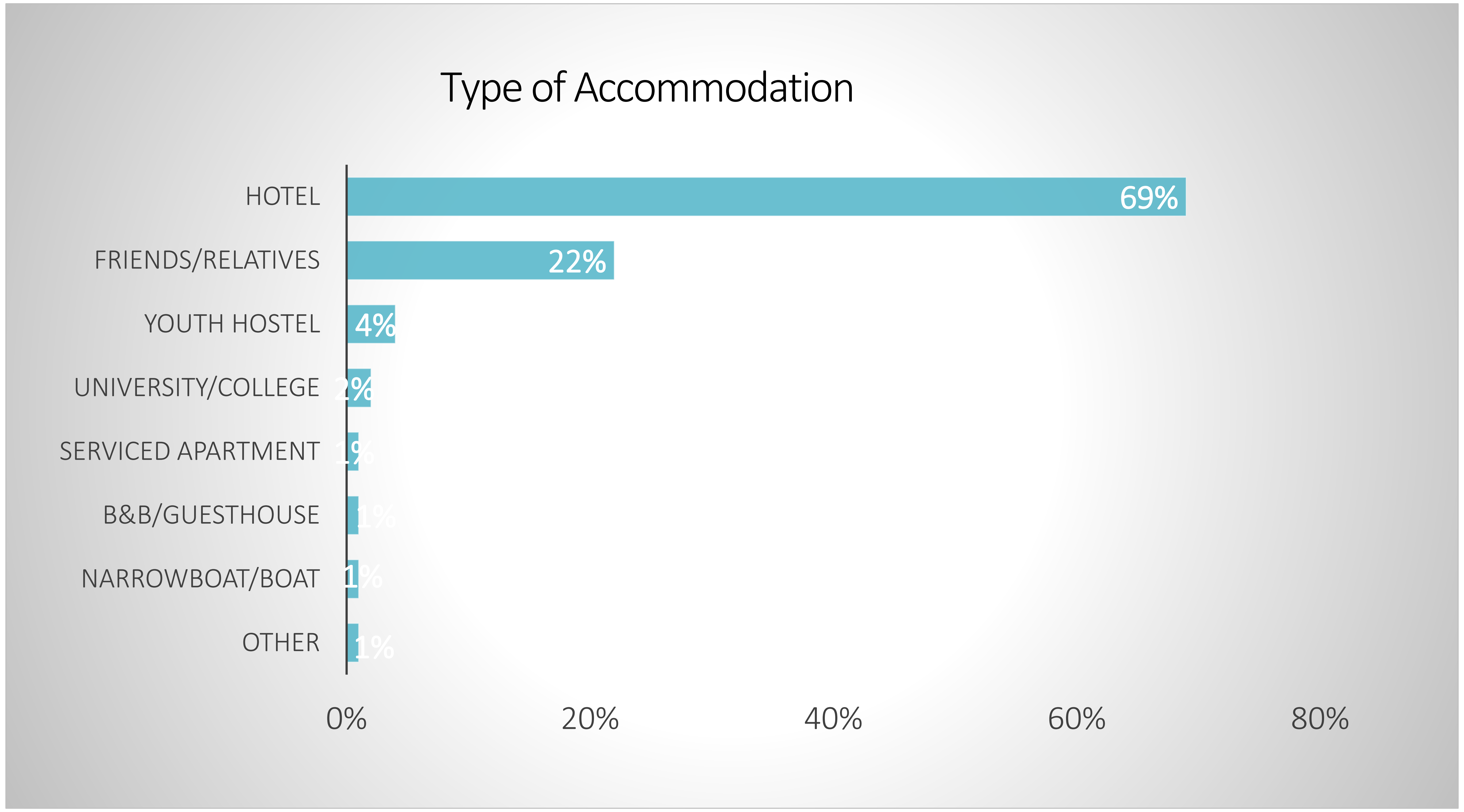
Type of Visitor

- Solo visitors accounted for 29% of all visitors to Birmingham with those travelling with their family accounting for (28%) of visitors, followed by adult couples (24%).
- Half of all visitors interviewed (both male and female) were aged 35 and under. There were slightly more females aged 25-34 (9%) than males (8%). There were more females aged 45+ (20%) than males (18%).
- Overall, only 19% of groups had children in their party.
- Over three quarters (79%) of all visitors to Birmingham are in the ABC1 groups – 41% AB and 38% C1.
- Almost two thirds (64%) of visitors were in full-time employment, with 15% retired on a company/private pension.

Reason for Visit

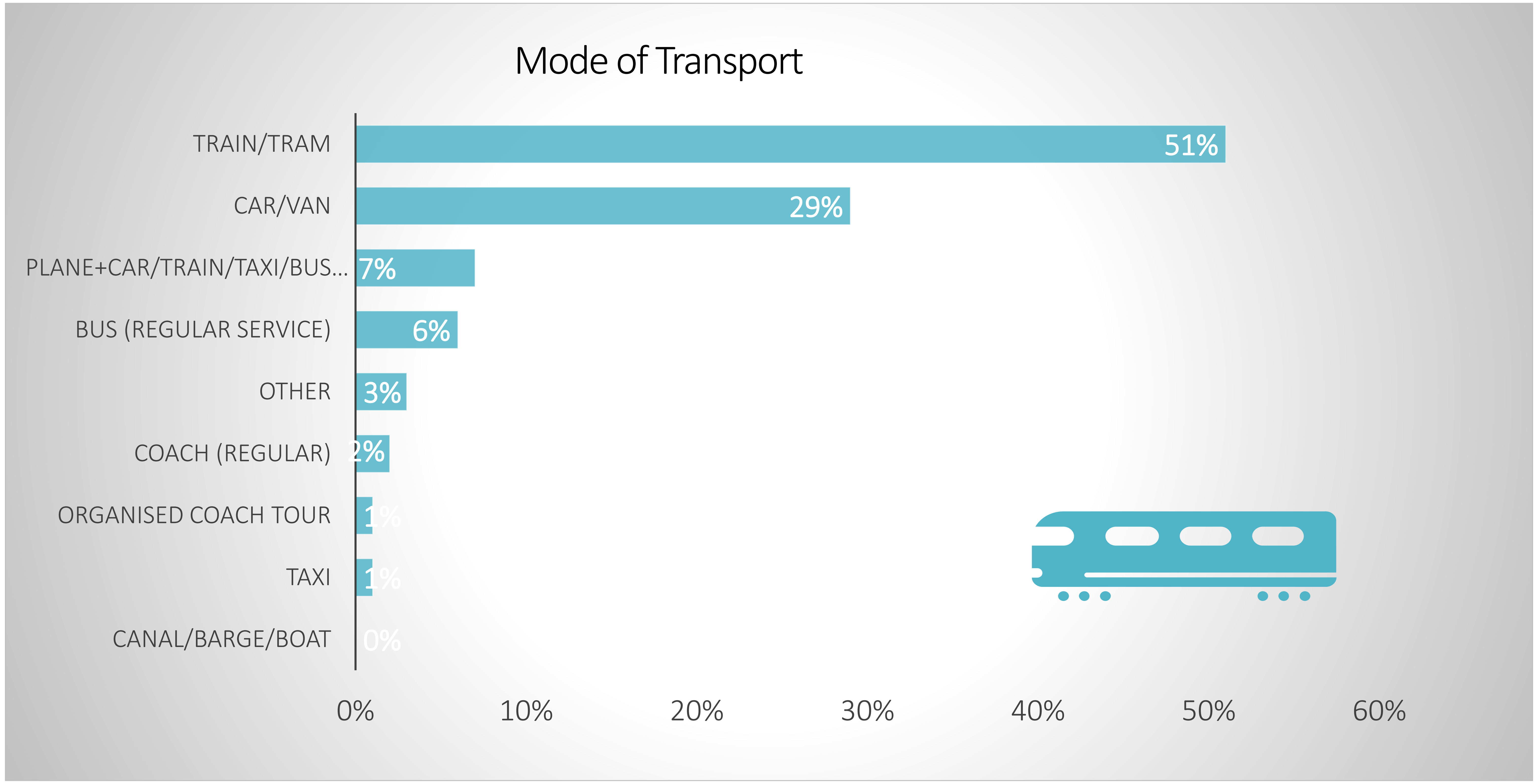
Main Reason for Visit	
Day trip/outing from home	41%
Day visit while on holiday	6%
Holiday or short break	25%
Touring holiday that includes staying in Birmingham	3%
Special/non-regular shopping trip	6%
Overnight visit to friends/relatives	3%
Day visit to friends/relatives	2%
Staying on business/conference	7%
Business visit for the day	4%
Other overnight trip	1%
Other day trip	2%

Accommodation



- The majority (69%) of all overnight visitors were staying in a hotel, followed by staying with friends and relatives (22%).
- Serviced accommodation was used by just under three quarters of overnight visitors (74%). Use of non-serviced accommodation accounted for 7% of all overnight visitors – which included staying in a youth hostel, University/College and staying on a narrowboat.

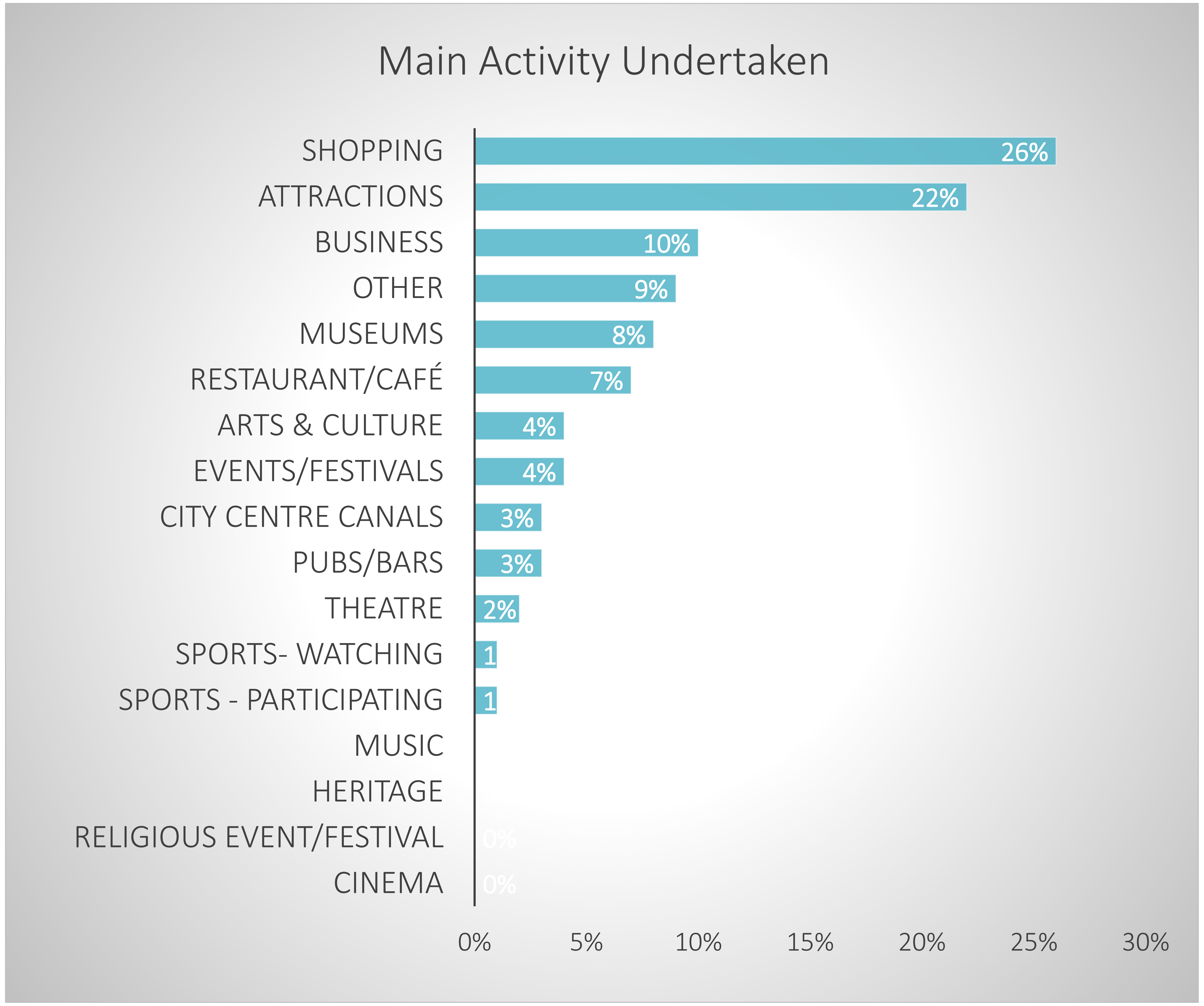
Transport



- Across England as a whole, public transport (regular bus/coach, train and tram) accounts for 16% of all domestic visitors' use of transport (GBTS 2015).
- In Birmingham, this figure is considerably higher due to the excellent public transport network to and within the City. Six out of ten visitors (60%) used public transport as their main mode of transport to arrive in the area.

Source: VisitEngland - GBTS 2015

Activities



- Shopping was the main activity undertaken in Birmingham, followed by a visit to a tourist attraction
- Visiting a restaurant/café and pubs/bars accounted for 10% of visitor activity in the City

Satisfaction Ratings

	Mean Score	Very Good	Quite Good	Fair	Quite Poor	Very Poor
Shopping	**4.57**	62%	34%	4%	1%	0%
Restaurant/Cafes	4.53	57%	39%	4%	-	-
Attractions	4.43	52%	41%	7%	1%	-
Music	4.24	45%	38%	13%	3%	1%
City Centre Canals	**4.58**	63%	32%	4%	1%	-
Theatre	4.44	51%	44%	5%	0%	0%
Pubs/Bars	4.34	48%	43%	8%	0%	-
Heritage	4.35	51%	42%	6%	1%	-
Museums	**4.55**	60%	36%	4%	1%	-
Arts & Culture	4.53	58%	37%	4%	1%	-
Sports- Watching	4.16	48%	37%	12%	3%	1%
Sports – Participating	4.05	39%	39%	14%	4%	4%
Events-Festivals	4.25	45%	40%	14%	0%	-
Cinema	4.18	51%	34%	14%	1%	-
Street Food	3.99	51%	25%	22%	1%	0%
Religious Festivals/Events	4.10	48%	27%	15%	6%	4%
Business Conference Facilities	4.44	52%	41%	6%	1%	-
Road Signs	3.77	47%	22%	22%	5%	4%
On-Street Pedestrian Maps/Signs	3.96	53%	24%	18%	3%	2%
Other	4.28	61%	28%	11%	-	-

Satisfaction Ratings

Key Findings

- All facilities/services received positive ratings and scored above average, with City Centre Canals scoring highest with 95% rating the Canal area as very good/good (4.58 out of 5.0).
- Shopping and Museums received the next highest (mean) scores, 4.57 and 4.55 respectively.
- The lowest mean scores recorded were related to signage with Road Signs (3.77) and on-street pedestrian signs/maps (3.96).
- However, looking at scoring generally, Birmingham's facilities and services were very well received.

Visits to Attraction

Top 15	Visited This Trip	Mean Score	Very Good	Quite Good	Fair	Quite Poor	Very Poor
Bullring Shopping Centre	63%	4.65	68%	28%	3%	-	-
Grand Central Shopping	43%	4.68	72%	25%	2%	1%	0%
Canals	33%	4.79	81%	17%	2%	-	-
Brindleyplace	30%	4.82	83%	16%	1%	-	-
Birmingham Museum & Art Gallery	26%	4.85	87%	12%	2%	-	-
Library of Birmingham	19%	4.82	84%	14%	2%	-	-
Mailbox	15%	4.56	64%	30%	4%	2%	-
National Sea Life Centre	13%	4.74	77%	21%	3%	-	-
Ikon Gallery	9%	4.74	77%	21%	2%	-	-
ICC	9%	4.69	74%	21%	5%	-	-
Jewellery Quarter	6%	4.53	60%	33%	7%	-	-
Town Hall	5%	4.55	59%	38%	3%	-	-
Cinemas	3%	4.36	50%	36%	14%	-	-
Cadbury World	3%	4.37	42%	53%	5%	-	-
Thinktank	2%	4.80	87%	7%	7%		

The top two most visited attraction was the Bullring Shopping Centre with 63% of visitors followed by Grand Central Shopping Centre (43%). The importance of the shopping experience can be seen along with the positive scores given for both attractions. Although not the most visited, the Birmingham Museum & Art Gallery (4.85) and the Library of Birmingham (4.82) were both highly rated by respondents with nearly all rating the Birmingham Museum & Art Gallery very good/good (99%) and a similar score for the Library of Birmingham (98%) rating this as very good/good.

Cultural Tourism

Key Findings

- Cultural tourism[1] is an important economic driver within the WMCA area, bringing both domestic and international tourists into the area. The diverse offer of the area alongside the events and festivals hosted in the area, attracts people into the region.
- Data from the WMGC Visitor Survey suggests that culture was the primary purpose of visit for over one in five visitors to the West Midlands (21%), with visitors coming for other reasons also undertaking cultural activities when they visit.
- We estimate that around 28 million visits to the WMCA area in 2019 were attributable to culture. Based on average spend by each visitor, it implies that a total of £2.3 billion of visitor expenditure is attributable to cultural tourism in the region.
- Based on this analysis, it implies that cultural tourism generates in the order of 40,000 jobs and £1.8 billion in GVA, which is roughly equivalent to 1 in 47 jobs and £1 in every £55 of GVA in the WMCA area. (Hatch, 2021).

[1]The World Tourism Organisations defines cultural tourism as: ‘all aspects of tourism that can teach visitors about their past and inheritance, as well as their contemporary lifestyles’.

We have defined cultural tourism as visits made to the region from residents outside the WMCA area for the primary purpose of cultural activities. This might include museums, heritage, arts and culture, dance, comedy, theatre, music and cultural events.

Festival & Events

Birmingham GVA Potentially Attributable to LGBT Population

Assumptions and inputs	Downside estimate	Mid range estimate	Upside estimate
LGBT population proportion	x 5%	x 6%	x8%
Birmingham GVA (All)	£18.7bn	£18.7bn	£18.7bn
LGBT value of city GVA	£0.94bn	£1.1bn	£1.5bn
Uplift of value due to higher earning LGBT @5%	Nil	+5%	+5%
	£0.94bn	£1.16bn	£1.58bn
Uplift of value due to higher earning LGBT @10%		+10%	+10%
		£1.2bn	£1.65bn

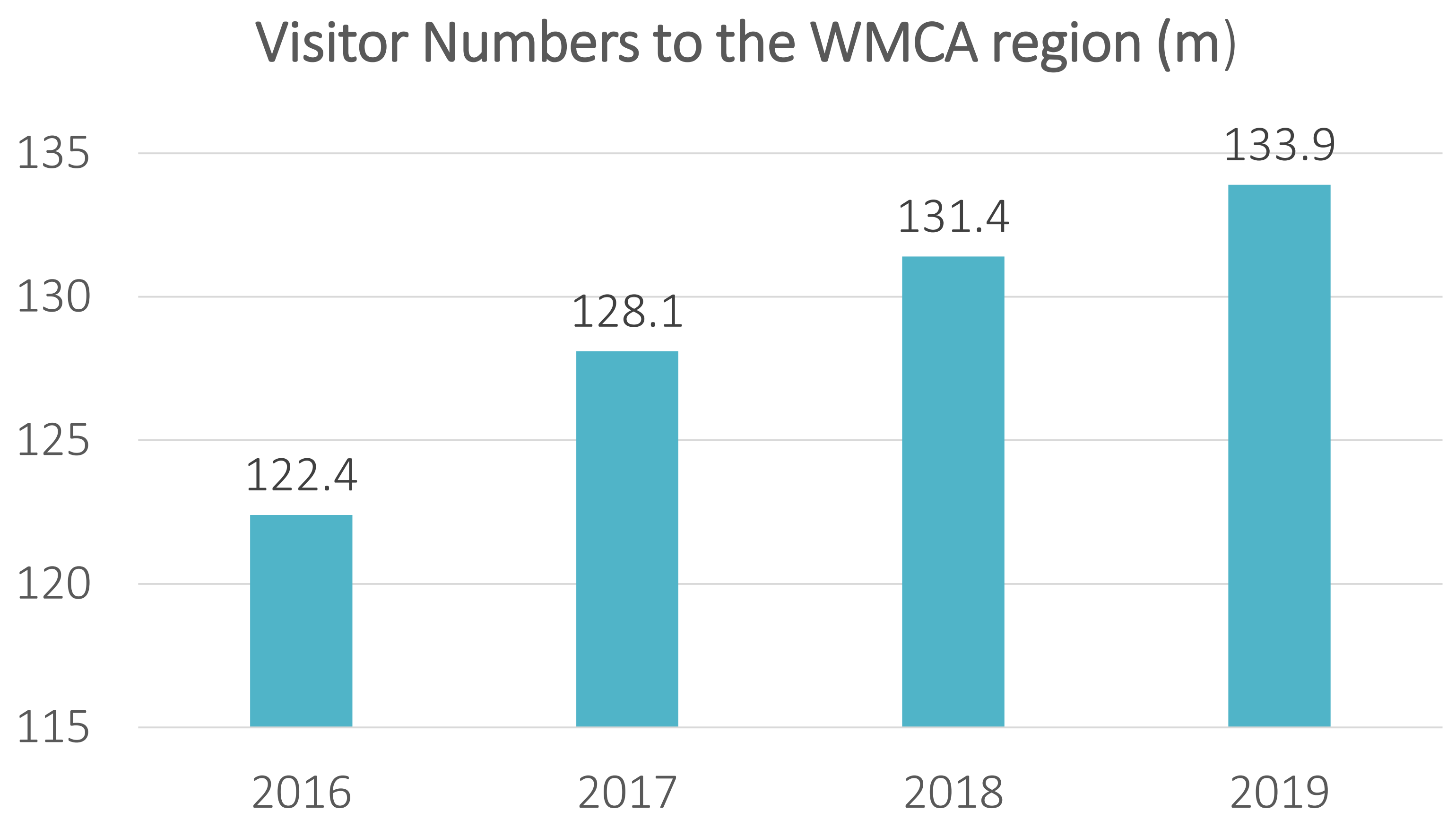
Based on the estimates and the underlying assumptions, the economic value of the LGBT community in Birmingham may be cautiously estimated at being between £0.94 billion and £1.65 billion. A mid point of around £1.2-£1.3 billion may be the most likely figure.

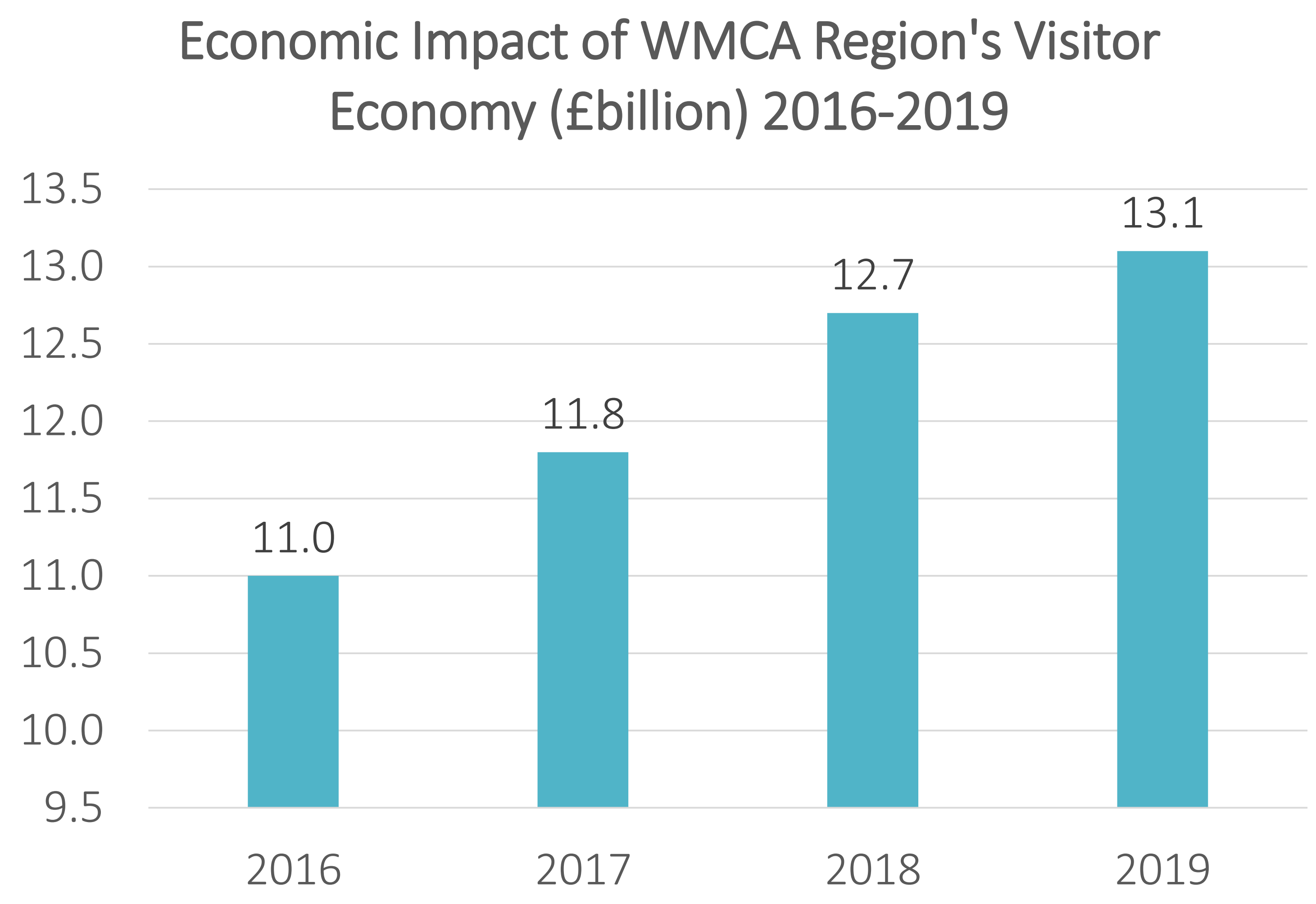
Applying uplifts of value due to greater proportions of the total population coming from LGBT communities and any above average earnings of LGBT people potentially increases the figure to over £1.6 billion.

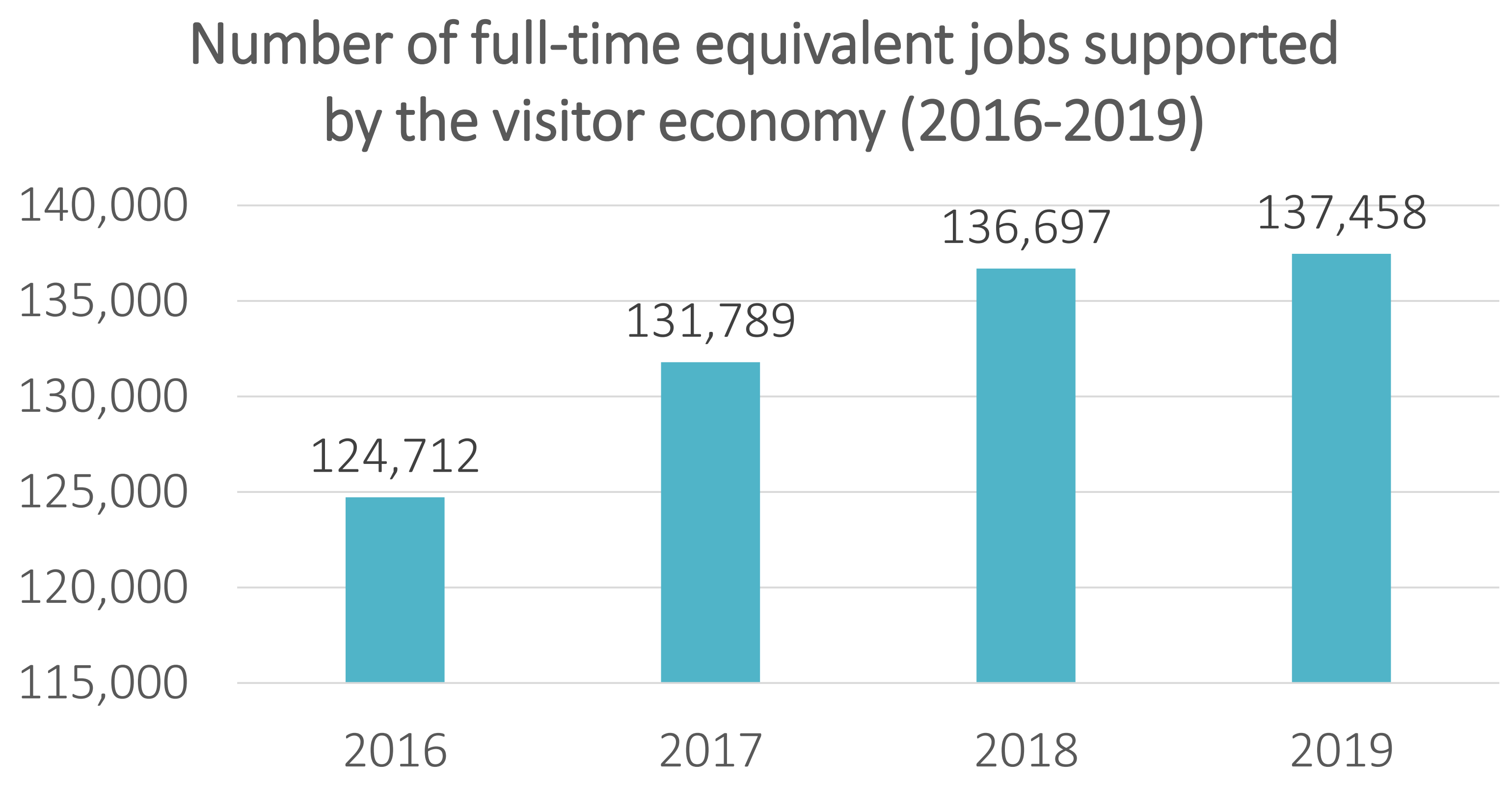
STEAM

STEAM

Prior to the pandemic, the West Midlands Growth Company (WMGC) reported a record 133.9 million visitors to the WMCA region. This was a 2% increase on the previous year and is in the context of steadily growing visitor numbers in recent years, as shown in the graph below:







The WMGC's latest commissioned analysis found that spending by the region's tourists contributed £13.1 billion of gross output/turnover to the WMCA economy, supporting an associated 137,458 full-time equivalent jobs. In line with overall visitor numbers, this has been increasing significantly every year.

STEAM

Latest data from STEAM 2020

SERVICED ACCOMMODATION 2020	2020		Change on 2019		Change on 2009	
	Est	Beds	Est.	Beds	Est.	Beds
Serviced Accommodation Total	128	22,547	-3	-71	-43	+4,495
+50 Room	75	20,675	-1	-28	+18	+6,095
11-50 Room	32	1,615	0	-7	-28	-1,279
<10 Room	21	257	-2	-36	-33	-321

Perceptions

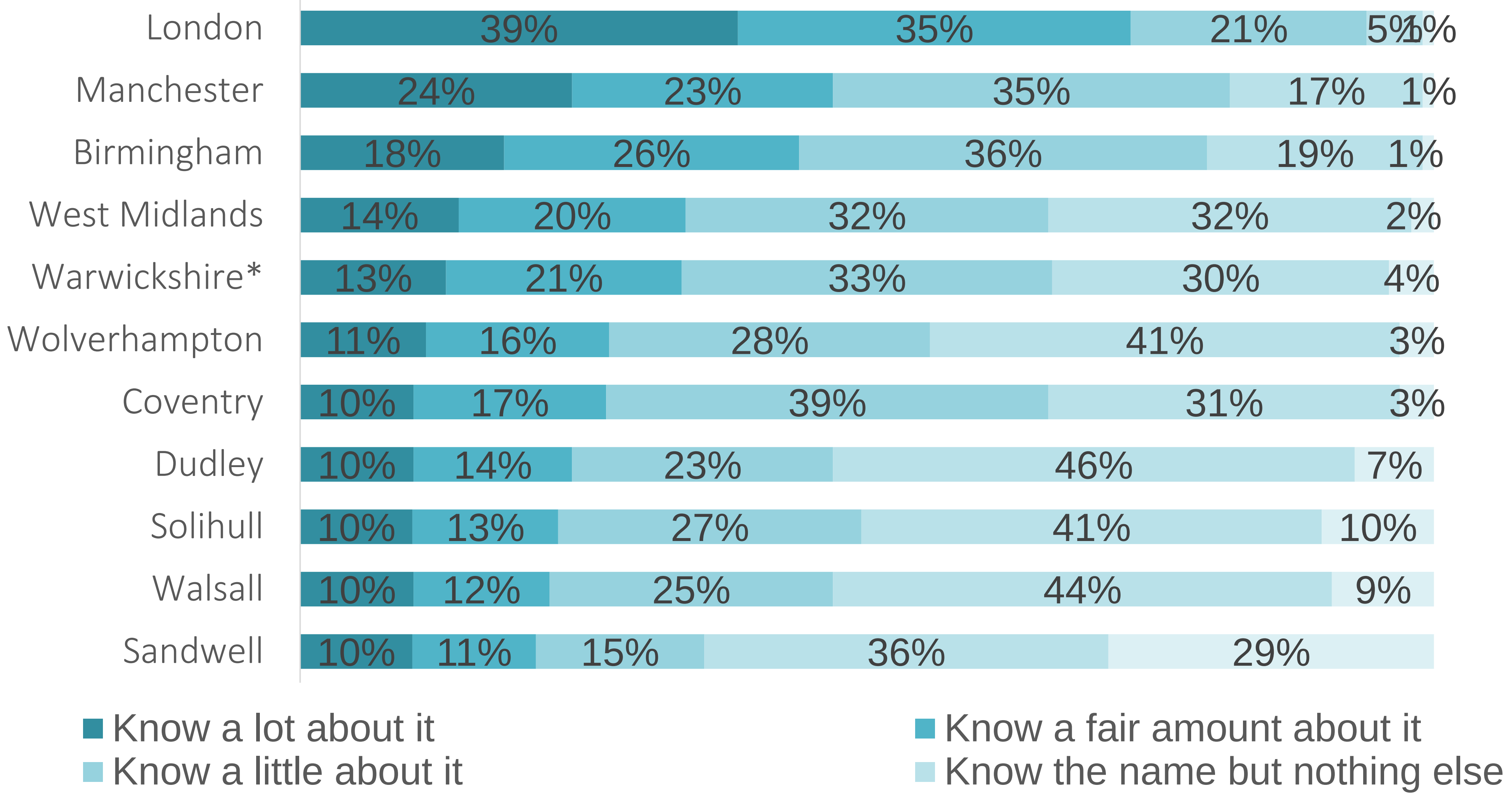
Perceptions of the West Midlands

- Birmingham continues to be the best-known of all the West Midlands places, followed by Warwickshire and Coventry.
- Birmingham has higher awareness than the ‘West Midlands’ descriptor across all audiences and markets.
- Prompted awareness of Birmingham as host city of the 2022 Commonwealth Games stands at 54% of intermediaries and 43% of leisure travellers.
- Sentiment towards the West Midlands region is positive on balance (but weaker than the UK).
- Positive sentiment is highest for Warwickshire (leisure travellers and travel trade) and Birmingham (conference, sport and investment intermediaries).
- Consideration levels are highest among Indian leisure travellers and sports events organisers (who are also more likely to recall communications about the West Midlands).
- West Midlands’ accessibility, venues, talent and tourist attractions are widely recognised and drive consideration. Lack of knowledge about the region dents consideration levels.

Perceptions

Familiarity with UK places: UK domestic leisure travellers

UK leisure travellers are most familiar with London and Manchester followed by Birmingham



Familiarity with UK places: international leisure travellers

Birmingham is the best-known West Midlands place for international leisure travellers: