

The Impact of the London 2012 Olympic and Paralympic Games on tourism to the UK



London 2012 – a recap

- London 2012 was broadcast in **220** countries and territories – a global reach of **3.6 billion people**, providing images of the UK seen around the globe.
- Events taking place at **12 iconic venues** across London from the Olympic Park in Stratford to Equestrian events at Greenwich Park.
- **11 venues** across the UK from sailing in Weymouth & Portland to Paralympic cycling at Brands Hatch in Kent.



The Torch and Culture



- The Olympic Torch Relay, showcasing the country over **70 days** to millions across the globe - **15 million** people on the route alone.
- Not all about sport - Cultural Olympiad/London Festival





"We will never forget the smiles, the kindness and the support of the wonderful volunteers, the much-needed heroes of these Games."

Jacques Rogge, President of the IOC

The Game Plan

- The global exposure that Britain enjoyed in 2012 provided an unprecedented opportunity to ensure that the whole of the UK visitor economy benefited from the 2012 Games. It gave us a platform to showcase the whole of Britain, to deliver a world-class welcome and to maximise the economic benefits of tourism across the UK.
- It wasn't just about promoting the few weeks of the 2012 Olympic and Paralympic Games. It was to make full use of the opportunities before, during and after those few weeks, to reach new customers in emerging markets and to refresh our appeal in core markets.
- It presented the opportunity to capitalise on the global platform offered by the 2012 Games to enhance the development of Britain's image overseas.

So what was the impact of the Games on tourism to the UK in 2012?

- There were **685,000 visits from overseas** to the UK in July, August and September 2012
- Live free to view or cultural events such as the London 2012 Festival pulled in another **186,000 visits**, bringing the total to **871,000** for all Games visits.
- The biggest numbers of these Games-time tourists included:
 - 102,000 from the United States
 - 70,000 from France
 - 64,000 from Germany
 - 54,000 from the Netherlands
 - 32,000 from Australia
 - 31,000 from Italy
 - 26,000 each from Canada and Spain
 - 24,000 from the Irish Republic and
 - 20,000 from Belgium.

Impact continued.....

- They spent **£925 million** during the Games. This is double the £668 average spend of non-Games related visits over the period.
- Among the **685,000** Games-specific visits London accounted for 510,000 of the overnight stays of one night or longer during the Games.
- 2012 saw (a then) record inbound visits and spend – **31.1 million and £18.6 billion respectively.**

But...

- Need to take account for the displacement effects that the Olympics had on tourism to the UK. The Olympic meta-evaluation accounted for those effects.
- Despite the influx of Games visitors overall international visitor numbers to the UK were actually down in Q3 2012 (July-September) when compared to the previous year.
- After accounting for these crowding out effects, it is estimated that, in net additional terms, the Games led to a decrease in overseas visitor numbers in 2012 of about 365,000.
- However, due to the fact that visitors coming for the Games spent more on average than other visitors, the net additional impact on visitor expenditure was positive – estimated to be £305 million, or £235 million excluding spending on tickets.

Ensuring a tourism legacy on the back of the Games

- The global showcasing of Britain in 2012 did wonders for Britain's image around the world, particularly in tourism's new growth markets.
- But we began working to ensure a tourism legacy on the back of the Games even before they had begun.

Campaigns

- January 2011, launch of VisitBritain's £100 million public/private partnership international campaign to attract visits to the UK over four years (2011-15)
- GREAT Britain marketing campaign launched November 2011, designed to show the world that Britain is a great place to visit, study in, invest in and do business with.
- These two campaigns aim to deliver an additional **4.7 million inbound visits** and **£2.3 billion spend** by inbound visitors over the 4 year period.



The Legacy Continues.....

- Post-Games VisitBritain long-term international strategy – *Delivering a Golden Legacy* - launched April 2013 which aims to:
- attract **40 million** inbound visits, resulting in spend of **£31.5 billion** (in real terms) pa by 2020.
- Supporting an additional **200,000** jobs

So how is it all going?

- The Government secured investment of over **£165 million**, to market Great British holiday destinations at home and abroad.
- The first three years of the GREAT campaign has increased the intention to travel in international markets, potentially delivering an estimated, additional **£305 million** spend.
- VisitEngland has reported total incremental economic returns of almost **£380 million** from its '*Holidays at Home are GREAT*' campaigns in 2012 and 2013.
- The UK achieved a top 5 ranking in the World Economic Forum's travel and tourism competitiveness index March 2013, and UK's welcome is up three places to 10th in the GFK Anholt Brand Index.
- **The UK also enjoyed a record year for tourism in 2013 with overseas visitors spending a record £21 billion, 13% more than 2012.**

Keep the sporting events coming

- National Lottery funded £27 million ***“Gold Event Series”*** to bring 70 prestigious sporting events to the UK, including 36 World and European Championships
- Events targeted to support British **athletes’** preparation and qualification for Rio 2016 Olympic and Paralympic Games
- An opportunity for 2.5 million **spectators** to continue to experience world class Olympic and Paralympic sport on home soil
- Flagship international events identified for eight London 2012 and five Glasgow 2014 venues
- Generating approximately **£287 million** additional expenditure in host cities and regions across the UK and over **250,000 overseas visitors**

Major sporting events following 2012

2012

UCI Track Cycling World Cup
Gymnastics World Cup

2013

Rugby League World Cup
BMX Supercross World Series
European Athletics Team Championships
World Triathlon Series Final
Rowing World Cup Series
Men's World Open Squash
ICC Champions Trophy Cricket

2014

Commonwealth Games
Ryder Cup (Gleneagles)
ITF Wheelchair Tennis Singles Masters

2015

Rugby Football World Cup
World Canoe Slalom Championships
European Eventing Championships
World Artistic Gymnastics (M&W)
European Hockey Championships
IPC Swimming European Championships

2016

LEN European Swimming Championships

2017

IAAF & IPC World Athletic Championships

2018

World Indoor Athletics Championships

2019

Cricket World Cup

Highlights

- The UK-wide Economic trade and investment benefits from the London 2012 Games currently stand at **£14.2bn**, way ahead of the 4-year **11bn target**.
- Since London 2012 we have staged World and European Championship events in Olympic disciplines such as Athletics, Canoeing, Cycling, Gymnastics, Hockey , Rowing and Triathlon. We have also successfully hosted the UEFA Champions League Final, ICC Champions Trophy Cricket, Rugby League World Cup, Tour de France Grand Depart and the Commonwealth Games.
- The UK has secured the rights to host over **25 further events** over the next six years.
- Wembley has just won the right to host the Semi-finals and the final of Euro 2020. Glasgow's Hampden Park will also host games

2013 Rugby World League Cup staged across England and Wales

- The direct economic impact of the 2013 Rugby League World Cup tournament for the hosts England and Wales was **£9.6m**. However the host towns and cities also benefited significantly, particularly the hosts of the showpiece occasions of the tournament.



2015 Rugby World Cup

- VisitEngland sees the Rugby Union World Cup in 2015 as a major tourism opportunity, with at least 400,000 international visitors predicted and with matches happening across England and Wales.



Glasgow 2014

- The Scottish Government's pre-Commonwealth Games Legacy report expected the Games to have an impact on the hospitality and tourism sectors in 2014 contributing **£45 million** to Scottish GVA.
- The Games have helped Scotland to secure 37 high-profile national and international events, with an estimated economic impact of **£14m**



Tour de France Grand Depart

- Independent Research on the economic impact underway.
- Anecdotal evidence from hotels and B&Bs in Yorkshire suggesting large increases in bookings by those wishing to bring a bike with them.

