Sent: 19 July 2021 10:25
To: Joanna Vincent <Joanna.Vincent@gateleyhamer.com>
Subject: Re: Rother Valley Railway Ltd Public Inquiry Access Information

For Attention of Inspector at RVR Inquiry:

Dear Sir,

I attach the ’Tourism Recovery Plan' mentioned this morning in our brief conversation.

The final paragraph on the first page of the 'Ministerial Foreword’ (p4) states:
’The government is committed to supporting the sector emerge from the pandemic to become more resilient, more sustainable, more inclusive and more innovative’

Para 101, Page 52, describes the AONB as potentially (Glover Review recommendation) ’should become leaders in sustainable tourism by working with….’ (Various relevant bodies named)…

And, at Para 107, Page 53 states that:
’The government will develop a Sustainable Tourism Plan, and out the UK t the forefront of the global discussion on sustainable travel’. The para continues, describing the benefits.

I hope this is helpful.

Sincerely. Derrick Coffee.

Department for
Digital, Culture,
Media & Sport

The Tourism Recovery Plan



June 2021

We can also provide documents to meet the specific requirements for people with disabilities. Please email enquires@dcms.gov.uk

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Ministerial Foreword

The tourism industry is one of the UK's great success stories.

There were 41 million inbound visits in 2019 and domestic overnight trips in England looked set in 2020 to hit 100 million. Travel was the UK's third largest service export, a catalyst for trade, an engine for growth, a creator of jobs across the length and breadth of the country and a key component of Britain's enviable soft power ranking.

In short, tourism showcases the best of Britain to the world.

When we started in our Ministerial roles in February 2020, we were keen to build on this legacy of success. But the pandemic had other plans.

The tourism industry has been one of the hardest hit sectors by COVID-19. It is not hyperbole to say that the pandemic has represented the most difficult for the industry in the era of mass global tourism. Inbound flight arrivals have been down 90% for over a year compared to 2019 levels, hotel occupancy far lower than normal, and the sector has been closed completely for at least six of the last twelve months.

It is therefore unsurprising that data from the Office for National Statistics shows the largest economic contractions in the services sector over 2020 were all parts of the tourism industry – air, maritime, travel agents, accommodation, rail and entertainment – nor is it surprising that tourism has been the sector most reliant on the government's unprecedented package of support measures such as the furlough scheme. Over £25 billion has been provided to the leisure, tourism and hospitality sector over the course of the pandemic.

However, the pandemic has also highlighted how much we owe the 1.7 million people directly employed by tourism in the UK – from the hoteliers and Bed and Breakfast owners to the tour guides and travel agents – and the 4 million working in the sector overall. Whether it is enjoying Britain's culinary scene or heritage offer, wandering the streets of our world-class cities or exploring the countryside, taking a holiday in Britain can help support the public's health and wellbeing, connect communities with the country's rich culture, heritage and natural environment, and inspire civic pride.

We can also take pride in the response of the sector as the pandemic unfolded, be that the conversion of event venues into Nightingale hospitals and vaccination centres, the willingness of hotels to open their doors to rough sleepers and victims of domestic violence or the swift action of the aviation and cruise sectors in the early months to repatriate UK nationals stuck abroad.

This government is determined to help the UK's world class tourism sector recover as quickly as possible with a full return to pre-COVID numbers by 2023 – ahead of independent forecasts. This means domestic and – in due course – international visitors spending more, staying longer, visiting throughout the year rather than just during the traditional tourist season, and accessing a more diverse range of destinations across the country. The government is committed to supporting the sector to emerge from the pandemic to become more resilient, more sustainable, more inclusive and more innovative. Whilst London is crucial to the fortunes of the UK's tourism sector overall, we want the recovery to be swift in every nation and region, and in both urban and rural areas.

Although there is much to do to help the sector recover, we also see plenty of reasons to be optimistic about the industry's future. Since we have started to roll back restrictions we have seen domestic tourists return in numbers. Looking ahead, 2022 will be a year of celebration and renewal and will be a springboard for promoting the UK at home and abroad. Her Majesty The Queen's Platinum Jubilee, the Festival UK* 2022, and the Birmingham Commonwealth Games are all major opportunities to bring people together, inspire the next generation, be a moment of renewal for the UK as we emerge from the coronavirus pandemic, and amplify key anniversary celebrations of some of our most beloved institutions. We also know that there is plenty of pent-up demand from people around the world to get travelling again, after many months of being stuck in their homes. We want to make sure they choose the UK, whether that's domestic travellers wanting to make the most of the incredible tourism offer on their doorstep, or international travellers seeing the UK as the place to do business or to wanting to explore our spectacular country on holiday. We want to make sure that people continue to make the UK their destination of choice year after year – because we certainly have more than enough to offer.

Throughout this pandemic we have been extremely grateful to businesses and organisations from across the tourism sector for their ongoing engagement with the government, their willingness to share evidence and their cooperation. We look forward to continuing our close working relationship as we deliver this Tourism Recovery Plan.





The Rt Hon Oliver Dowden CBE MP
Secretary of State of Digital, Culture, Media and Sport





Nigel Huddleston MP
Parliamentary Under-Secretary of State for Sport and Tourism

Executive Summary

1. In November 2020, as part of the first Global Travel Taskforce report,[1] the UK government made a commitment to bring forward a Tourism Recovery Plan in 2021. This commitment was reiterated in the Prime Minister's Spring Reopening Roadmap published in February.[2]

2. Tourism is an economic, social and cultural asset. The sector is a major contributor to jobs and growth in the UK, indirectly employing 4 million people and making a direct economic contribution of £75 billion a year pre-pandemic.[3] The sector connects people to the UK's history, showcases the UK's innovation, and will have a key role to play in reviving the spirits of the nation as the country emerges from the pandemic.

3. The commitment to produce a Recovery Plan arose from the simple fact that tourism has been one of the hardest hit sectors of the UK economy by COVID-19. Tourism is a sector that relies on the mass movement and mixing of people, two of the factors most likely to spread the virus, and as such has been heavily affected by the necessary restrictions put in place to control the pandemic.

4. The UK government acted swiftly throughout the pandemic, providing a range of both targeted and pan-economic support measures to protect jobs and businesses across the tourism industry. Over £25 billion has been provided so far to the tourism, leisure and hospitality sectors in the form of grants, loans and tax breaks,[4] and tourism has been one of the most reliant economic sectors on measures like the furlough scheme.[5] Taken together, government support has helped ensure the majority of the sector will be there to welcome visitors once again as the economy reopens.

5. However, Oxford Economics does not predict tourism in the UK to return in full to 2019 levels of volume and expenditure until 2025.[6] There are a wide range of factors influencing this, such as the pace of vaccine rollout in inbound markets, the impact of social distancing on capacity, the impact of the pandemic on consumers' discretionary spending power, the threat of potential variants of concern emerging and lingering doubts amongst consumers about their own safety when travelling. Nevertheless, these forecasts are simply not quick enough for a sector with so much to offer.

6. This Tourism Recovery Plan sets out the role that the UK government will play in assisting and accelerating the tourism sector's recovery from COVID-19. It also sets out a framework for how the government will work with the sector to build back better.

7. Looking ahead, the UK government wants to see a growing, dynamic, sustainable and world-leading tourism sector reaching its full potential and driving growth across all parts of the UK. Specifically, the aim is to:

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[1] Department for Transport. Report of the Global Travel Taskforce. 24 November 2020.
[2] Cabinet Office. COVID-19 Response – Spring 2021. 22 February 2021.
[3] Office for National Statistics. Tourism Satellite Account. November 2020.
[4] Department for Digital, Culture, Media and Sport estimate, based on published data from the Office for National Statistics. Includes Coronavirus Job Retention Scheme, Bounceback and other loan schemes, the VAT cut, the Culture Recovery Fund, the Self Employment Income Support Scheme and Eat Out to Help Out.
[5] Office for National Statistics. BICs survey Wave 27. April 2021.
[6] Oxford Economics – published alongside the Tourism Recovery Plan.

- Recover domestic overnight trip volume and spend to 2019 levels by the end of 2022, and inbound visitor numbers and spend by the end of 2023 – both at least a year faster than independent forecasts predict.
- Ensure that the sector's recovery benefits every nation and region, with visitors staying longer, growing accommodation occupancy rates in the off-season and high levels of investment in tourism products and transport infrastructure.
- Build back better with a more innovative and resilient industry, maximising the potential for technology and data to enhance the visitor experience and employing more UK nationals in year-round quality jobs.
- Ensure the tourism sector contributes to the enhancement and conservation of the country's cultural, natural and historic heritage, minimises damage to the environment and is inclusive and accessible to all.
- Return the UK swiftly to its pre-pandemic position as a leading European destination for hosting business events.

8. In the short term, these objectives will be achieved by getting the tourism sector reopened safely and providing businesses with the support they need to return back to profit. For example, the government has allocated at least £19 million to domestic and international marketing activity, with a £5.5 million domestic campaign already underway. Measures such as the VAT cut for tourism and hospitality, and a continuation of business rates relief for eligible properties will continue supporting businesses with cash flow, and new proposals set out in this Plan such as the introduction of a domestic tourism rail product and a voucher scheme run by the National Lottery, will help stimulate demand. There is a particular focus in the Plan on maximising the set piece events scheduled for 2022; Her Majesty's Platinum Jubilee, the Festival UK* 2022[7] and the Commonwealth Games will all act as major domestic and international tourist draws.

9. Once restrictions are lifted, the government will focus on building back better. For example, the Plan lays out significant levels of UK-wide investment already underway in tourism product and infrastructure, as well as new support due to come in over subsequent years, such as the £4.8 billion Levelling-Up Fund. A root and branch independent review led by Nick de Bois, assessing how best to structure and support tourism at a regional level is also underway, having been launched in March. Other measures, such as an expanded advocacy and ambassadorial programme for business events, are also set out.

10. The Plan will be delivered in close partnership with the tourism sector and the devolved administrations and will take a whole of government approach. Mechanisms are being put in place to revisit the Plan at regular intervals, including a new inter-Ministerial group for Tourism, chaired by the Secretary of State for Digital, Culture, Media and Sport and supported by the Minister for Tourism.

11. This Plan represents an important milestone in the recovery of the tourism sector from this pandemic. It will ensure the tourism sector is well placed to reach its full potential and contribute to the UK government's ambitious overall plan for growth.

[7] A working title.


LAMB & FLAG
PUBLIC BAR

Chapter 1: The Framework

The UK government wants to see a growing, dynamic, and sustainable tourism sector reaching its full potential and driving growth in every nation and region of the UK.

Tourism has a significant role to play in delivering the government's wider Global Britain, levelling-up and economic growth agendas. The UK government is determined to do what it can to help the sector recover swiftly from COVID-19 and to build back better from the pandemic with a greener, more accessible, more resilient, more productive and more innovative tourism industry.

COVID-19 will continue to present challenges and uncertainties to the tourism sector for some time. This plan will be reviewed and updated to ensure that the policy interventions are meeting the needs of customers and tourism businesses, continually engaging with the sector to ensure the right interventions are in place at each stage of the recovery.



Box 1: Overview of the tourism sector

The tourism sector covers inbound, outbound and domestic travel. It includes travel for both leisure – including holidays and visiting friends and relatives – and business purposes. In 2019, the sector encompassed a diverse range of 230,000 businesses, mostly small and medium sized enterprises. The sector covers:

- **Transport** businesses including: airlines, ports/terminals, rail, cruise, coach, taxi, ferries, barges and buses;
- **Accommodation** providers including: hotels, B&Bs, self-catering, hostels, camping, caravanning, riverboats, cruises, resorts and holiday parks;
- **Attractions** including: indoor and outdoor events (sports, music, festivals, business events, fairs etc.), heritage, parks and gardens, theme parks, casinos, theatres, retail, food and drink, and experiences (spas, tours etc.);
- **Facilitators** including: Destination Management Organisations, tour operators, tour guides, travel agents, travel management companies, travel insurance, FX bureaus and tourist information centres;
- **Suppliers** including: event organisers, security, maintenance, food and drink manufacturers, florists and English Language Schools.

Inbound tourism: The UK welcomed 41 million visitors in 2019, who spent over £28 billion, making the UK the tenth most visited country in the world and the fifth most valuable tourist destination.

Top Five Markets by Visits 2019

	From	Visits (000)	% of all visits
1.	USA	4,499	11%
2.	France	3,561	9%
3.	Germany	3,233	8%
4.	Republic of Ireland	2,851	7%
5.	Spain	2,326	6%

Top Five Markets by Spend 2019

From	Spend (£m)	% of all spend
USA	£4,184	15%
China	£1,710	6%
Germany	£1,567	6%
France	£1,398	5%
Australia	£1,174	4%

Inbound tourism policy is led by the Department for Digital, Culture, Media and Sport, working particularly closely with the Home Office (which leads on border related issues, such as visas) and the Department for Transport (which leads on airlines and cruises). VisitBritain also plays an important international marketing and promotional role, working with the GREAT Britain and Northern Ireland Campaign.

Domestic tourism: In 2019, Britons took 99.1 million overnight trips (all purposes) in England, totalling an expenditure of £19.5 billion. Domestic tourism policy is led by the Department for Digital, Culture, Media and Sport, who are responsible for many aspects of the country's tourism offer, including heritage, arts, theatres and museums. VisitEngland also plays an important role, working with VisitScotland, VisitWales and Tourism Northern Ireland, as do other departments, such as the Department for Business, Energy and Industrial Strategy (which leads on the hospitality sector and weddings), the Department for the Environment and Rural Affairs (which leads on National Landscapes, zoos, and waterways) and the Department for Transport (which leads on coaches and rail).

Business events: Business visits accounted for 21% of all inbound visits in 2019, with 8.7 million such visits, and contributed £4.8 billion in spend. Business tourism policy is led by the Department for Digital, Culture, Media and Sport, but it touches on all government departments; all economic sectors are uplifted by business events and business travel.

Outbound: Each year, UK residents take more than 70 million trips abroad, with British travellers being the fourth biggest spenders in the world. Outbound tourism policy is led by the Department for Transport (who have led on the Global Travel Taskforce), the Department for Business, Energy and Industrial Strategy (which leads on consumer protection matters) and the Department for Health and Social Care (which leads on public health measures such as hotel quarantine and testing).

Whilst the outbound travel sector is vitally important in terms of its contribution to the economy and to employment, the primary focus of this Plan is the recovery of the UK's tourism offer, from reopening and supporting UK businesses and stimulating demand for UK tourism, to the longer term imperative to create a resilient, sustainable and innovative UK offer. As such, this Plan centres on domestic and international inbound leisure tourism, including tourists travelling to the UK for holidays as well as to visit friends and relatives, and also business tourism.

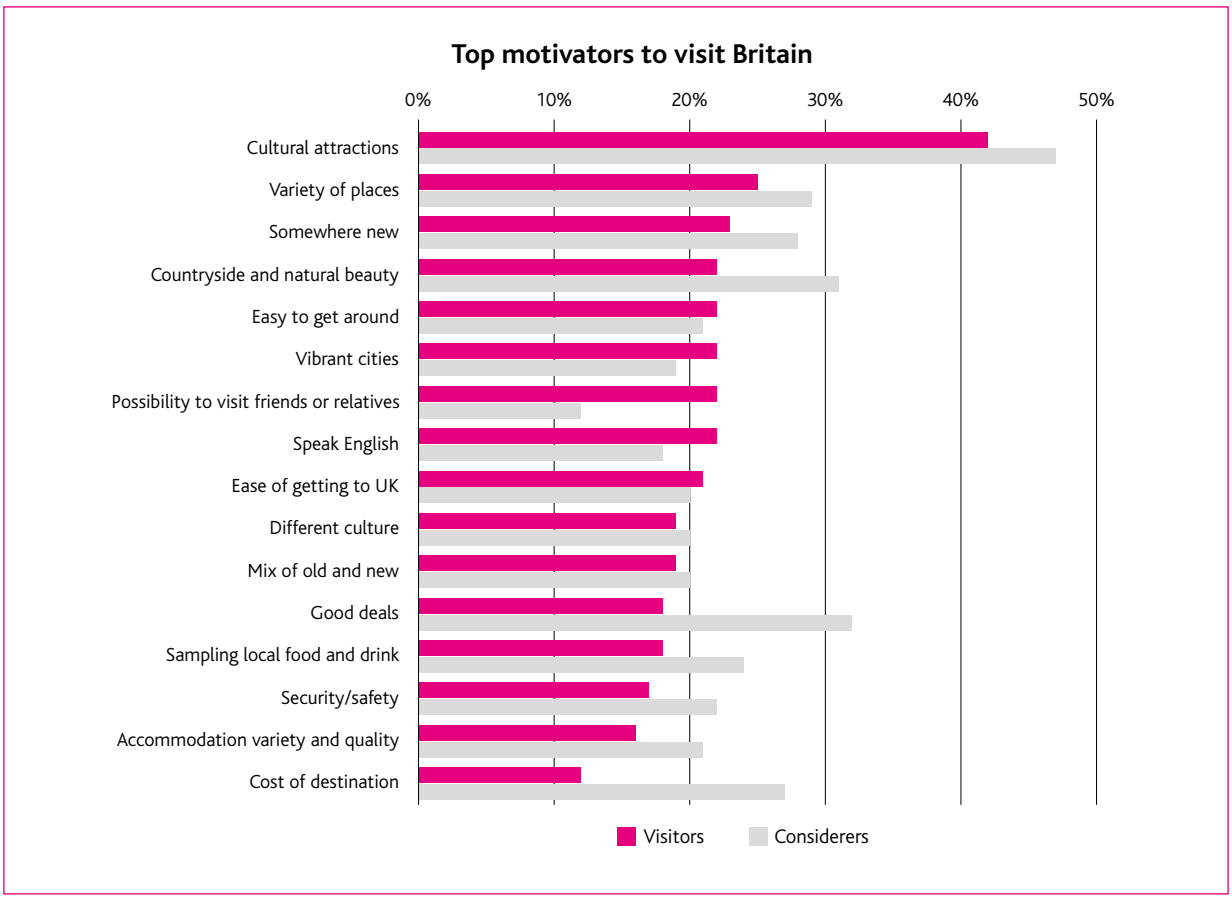
Introduction

1. **The UK's tourism industry is a national asset.** In 2019, tourism made a direct economic contribution of £74.5 billion to the UK economy, representing around 4% of the UK's total gross value added.[8] There were approximately 4 million people indirectly employed in jobs serving tourists, with high numbers of young people and women employed in the sector. Figures show that there were 230,000 diverse businesses distributed across the length and breadth of the country – from tea shops to theme parks, hotels to campsites, canals to museums, National Landscapes to beaches and coaches to airports.[9]

2. **The UK is also a world-leading tourism destination.** 41 million visitors came to the UK for business or leisure in 2019, 10 million more than in 2010.[10] They spent over £28 billion whilst here (contributing an estimated £4.5 billion in tax revenue)[11], putting the UK in the top 5 countries globally for inbound visitor spending.[12] On the domestic side, England looked set to hit 100 million domestic overnight trips.[13]

3. **The UK is attractive to consumers because it has something to offer everyone.** When asked, inbound consumers say that Britain's cultural attractions are the top motivation for visiting, followed by the variety of places on offer and the fact that it is somewhere new.[14] The UK has world class museums and attractions, breathtaking and diverse natural landscapes, a thriving cultural and arts sector, a world-famous festival scene, unrivalled expertise in staging and organising business and sporting events, a renowned heritage offer, great transport connections, first-class food and drink and much more. If the tourism sector is successful, then many other sectors – like arts, culture, hospitality, air, maritime, rail, coach, and business travel – are successful too.

[8] Department for Digital, Culture, Media and Sport. DCMS Sectors Economic Estimates. February 2021.
[9] IBID
[10] VisitBritain inbound tourism performance (https://www.visitbritain.org/2019-snapshot)
[11] From Airline Passenger Duty, VAT, visa fees and corporation tax contributed by international visitors to the UK, based on 2019 tax revenue data from HMRC, ONS and OBR.
[12] UNWTO. World Tourism Barometer. December 2020.
[13] VisitEngland GB Tourism Survey (https://www.visitbritain.org/gb-tourism-survey-2019-overview)
[14] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_150_-_researching_and_planning.pdf



4. **Business tourism is a particularly key component of the UK's offer.** Exhibitions, trade fairs, business meetings, conferences and other related activities provide a super-marketing platform for leading UK sectors, such as life science and finance, to showcase their products and latest innovations. Every industry has at least one major show or annual event. Prior to COVID-19, the UK business events industry was worth over £31.2 billion annually in direct visitor spending by event attendees and it employed an estimated 700,000 people across a wide range of creative, logistical, marketing, technical and organisational jobs. A further £165 billion was transacted at events (e.g. boat sales at the Southampton Boat Show) which provide platforms for business-to-business and business-to-consumer engagement, sales and growth.[15]

5. **Tourism does not just have a major economic and jobs impact, it also connects people to the UK's culture, heritage and natural landscapes like no other sector.** Whether visiting friends or relatives in another part of the country, having a long weekend away, or booking a long holiday, tourism can have positive impacts on physical, mental and emotional wellbeing. Furthermore, experiencing the UK first hand as an international visitor adds to the UK's soft power, building the UK's global reputation and promoting the UK's values. This in turn generates a familiarity with, and an affection for, the UK that encourages shared alliances, inward investment, repeat visits and international trade.

6. **Yet all this was put on hold by COVID-19. Undoubtedly, the pandemic is the worst crisis to have hit the tourism sector in peacetime – not just in the UK, but globally.** Few sectors have been hit as hard as tourism, an industry reliant on the movement and mixing of people and close sharing of experiences. In the UK, the impacts of COVID-19 on tourism demand and supply have far exceeded those of Foot and Mouth disease in 2001, the financial crisis in 2008 and major terrorist incidents combined.

[15] Business Visits and Events Partnership. The UK Events Report. May 2020.

7. **Since March 2020, international tourism has all but ceased,** with inbound flight arrivals to the UK down around 90% on 2019 levels for much of 2020 and into 2021, and outbound flights from the UK down around 85%.[16] International rail operators through the Channel Tunnel (who transported more than 20 million passengers per year pre-COVID-19) have seen a substantial fall in demand.[17] The international cruise sector, a fast growing sector pre-pandemic, has been unable to restart; in 2019, the sector saw 2.2 million cruise passengers travel through UK ports, which was a 63% increase when compared to 2009.[18]

8. **Domestic tourism has been restricted across the UK over the past year,** with many tourism businesses closed and major sporting, cultural, outdoor and business events either prohibited from taking place or severely restricted for at least six of the last twelve months which reduced capacity, restricted earnings potential and disincentivised tourism. This impact on tourism has had a knock on effect on many other sectors dependent on it, such as heritage, museums, events and the tourism supply chain.

9. **COVID-19 struck at one of the worst possible times, just as the peak UK summer season in 2020 was about to start.** One major feature of UK tourism is that it is very seasonal, with the majority of income earned in the spring and summer months. Widespread fears across the sector of 'three winters' worth of business at the start of the pandemic were not unfounded. A limited number of coastal and rural areas were granted some brief, albeit relative, respite in late summer 2020 when restrictions were lifted enough to permit leisure travel. However, cities – and particularly those dependent on international visitors – saw no return in tourist activity. The recovery of urban areas will require coordinated activity to reassure and inspire people to return to towns and cities safely.

10. **As well as having a significant impact on supply and demand, the pandemic has also shone a greater light on the structural barriers holding the UK's tourism industry back from reaching its full potential.** Seasonality is the biggest barrier, which impacts the ability of tourism businesses to retain staff year round and reduces economic productivity. Other barriers include market fragmentation, which can inhibit coordination across the sector and a lack of information about the UK's offer outside London (especially in long haul markets) – 55% of inbound spend in 2019 was in London. London saw 21.7 million inbound visitors in 2019, with Edinburgh in a distant second place at 2.2 million.[19]

11. **COVID-19 also came at a time when major new developments were occurring for tourism globally.** Concerns about climate change were starting to drive consumers to consider more sustainable tourism experiences; countries were looking to upgrade their offer to cater for aging populations; and international competition for market share was becoming ever more competitive.

12. **The potential for COVID-19 to wreak havoc on the sector was mitigated by swift and decisive government action.** At least £25 billion has been provided to the tourism, hospitality and leisure sectors over the last year by the UK government in the form of loans, grants and tax cuts. Interventions such as furlough and 100% business rates relief for leisure, retail and hospitality businesses in England have saved thousands of jobs and prevented many business closures. Initiatives such as the £1.57 billion Culture Recovery Fund have protected England's main tourist draws, and will continue to do so with a further £300 million allocated to the fund for 2021-22. Smaller scale innovations such as the UK-wide Good to Go COVID-19 secure accreditation have paved the way for consumers returning safely and with confidence.

13. **The UK is not operating in a vacuum and the post-COVID-19 competition to attract inbound visitors and retain domestic tourist markets will be fierce.** The UK is not the only government investing in supporting its tourism sector; governments around the world – in markets such as Australia, the US, Germany and Ireland – are providing tourism support packages, launching tourism campaigns,

[16] Forward Keys data.
[17] RAI0108, Rail usage, infrastructure and performance. DfT
[18] Published Sea Passenger Statistics, https://www.gov.uk/government/statistics/sea-passenger-statistics-all-routes-2019
[19] VisitBritain Town Data sourced from the International Passenger Survey: https://www.visitbritain.org/town-data

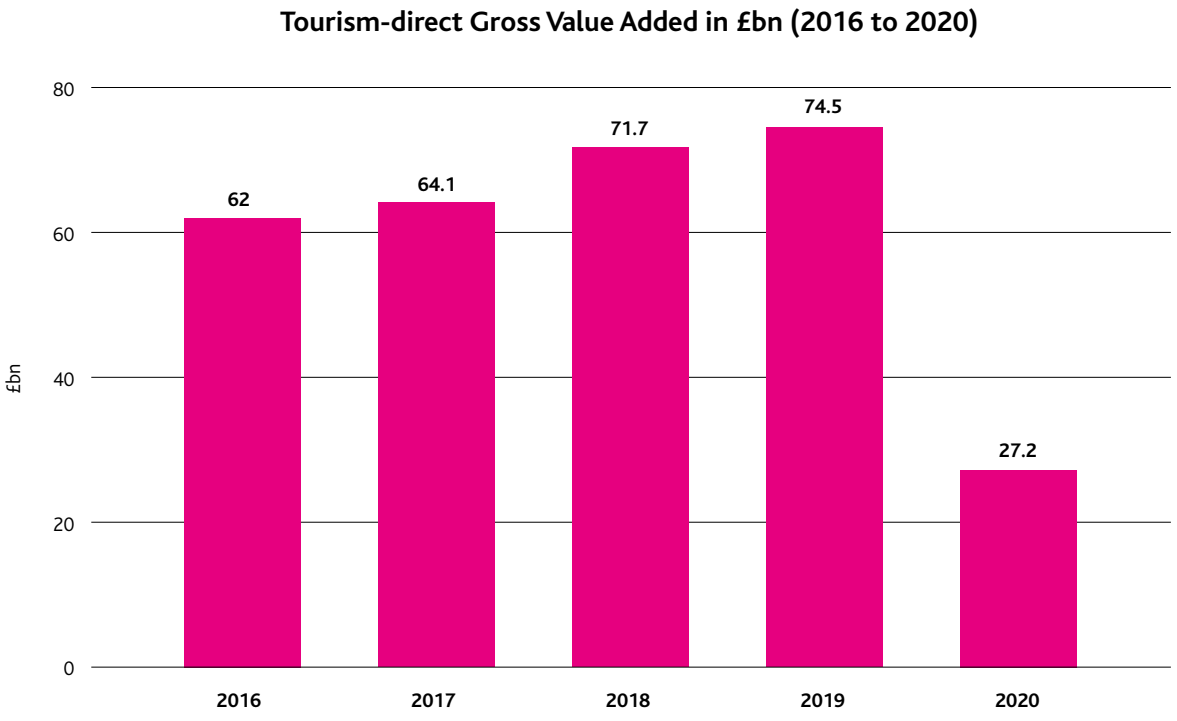
and developing strategies for long term recovery. A global tourism ecosystem is a necessary and positive facet of modern life: it allows people to experience different cultures and broaden their horizons as global citizens; it creates markets that benefit communities across the world; and it underpins the success of the UK's own important outbound travel sector. But given this global competition, the UK must focus on stimulating domestic tourist demand in the short term – starting with a Great British Summer – and attracting new and returning international tourists as overseas travel becomes possible again.

14. **The government recognises that there is plenty more to do.** Oxford Economics has predicted that the tourism sector as a whole will not recover to 2019 levels until 2025.[20] This is not quick enough for a sector that can offer so much and the government is determined to bring that forward. Furthermore, the UK government's ambition is not to simply return to the way things were in 2019. As the sector rebuilds from COVID-19, now is the time to ensure it is reaching its full potential and to tackle the structural barriers holding it back, so that the sector can seize the opportunities to become a more sustainable, more innovative, more inclusive, more productive and more resilient industry. This Tourism Recovery Plan sets us on that path.

Box 2: The impact of COVID-19 on the tourism sector in numbers

COVID-19 hit the sector hard...

Tourism-direct gross value added is estimated by Oxford Economics to have fallen by 64% between 2019 and 2020, from £75 billion to £27.2 billion and overall the fall in tourism's economic output over 2020 is estimated to have led to a 1.5% fall in UK GDP.[21]



[20] Oxford Economics forecasts, published alongside the Tourism Recovery Plan.
[21] Oxford Economics forecasts, published alongside the Tourism Recovery Plan

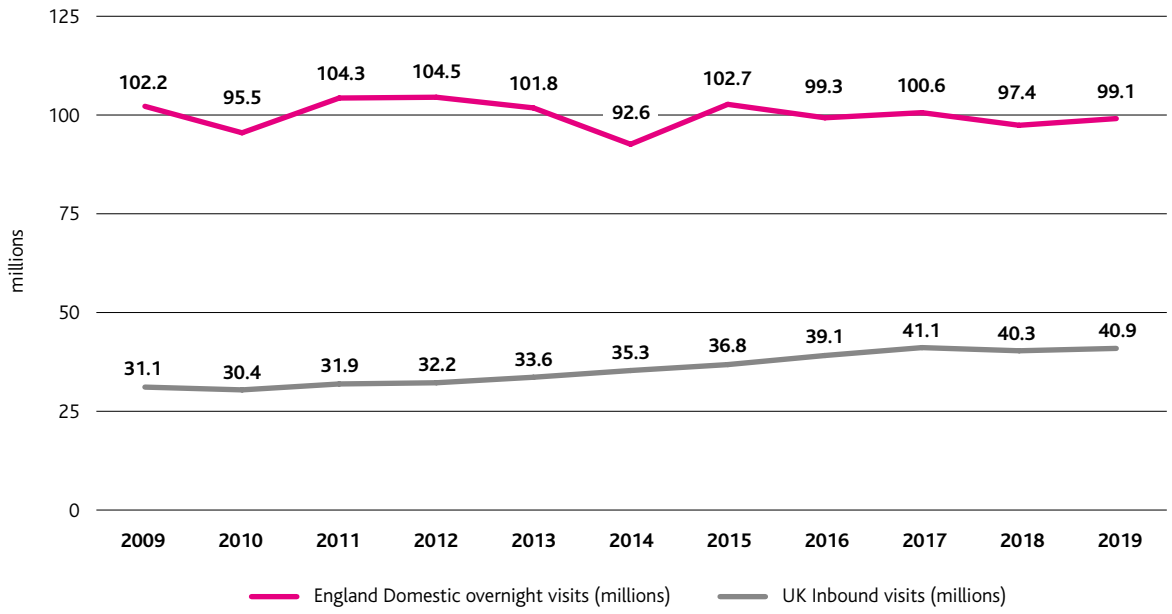
Tourism-facing sectors were amongst the hardest hit across the economy – 9 out of the 10 service sectors that contracted the most in economic terms over 2020 were tourism facing – for example, there was an 87% decline in economic output from tour operators, and an 80% decline in accommodation stays.[22]

There have been significant regional discrepancies – hotel occupancy rates across the UK in 2020 were down 64% on 2019 levels, with gateway cities such as London, Birmingham and Edinburgh hit hardest[23] – in part driven by the hit to international travel. However, a minority of coastal and rural areas – such as Cumbria and Cornwall – were able to hit 100% occupancy in the summer months of 2020, albeit at reduced capacity due to social distancing.

The outbound sector has also suffered. Outbound flight searches in 2020 were down 77% on 2019 levels,[24] outbound bookings were down 75% and departures down 96%.[25]

Falling demand has severely affected sector supply, the majority of which is made up of small and medium sized businesses. As of 18th April 2021, over a third (35%) of tourism businesses have seen their turnover fall by 50% or more, the highest of any economic sector (average 9% who have experienced this).[26] The decline in cash flow has led to a worsening of firms' financial health, with the latest ONS business survey stating that only 30% of accommodation and food services firms have high confidence that they will meet their debt obligations, compared to 43% of firms in the wider economy.[27]

England domestic overnight visits and inbound visits, in millions – 2009 to 2019



[22] https://www.ons.gov.uk/economy/grossdomesticproductgdp/articles/coronavirusandtheimpactonoutputintheukeconomy/january2021
[23] STR hotel occupancy data
[24] Kayak flight search trends
[25] Forward Keys flight data
[26] ONS Business Impacts of Coronavirus Survey (BICS), wave 29
[27] ONS BICS wave 29

But government intervention has protected jobs and businesses

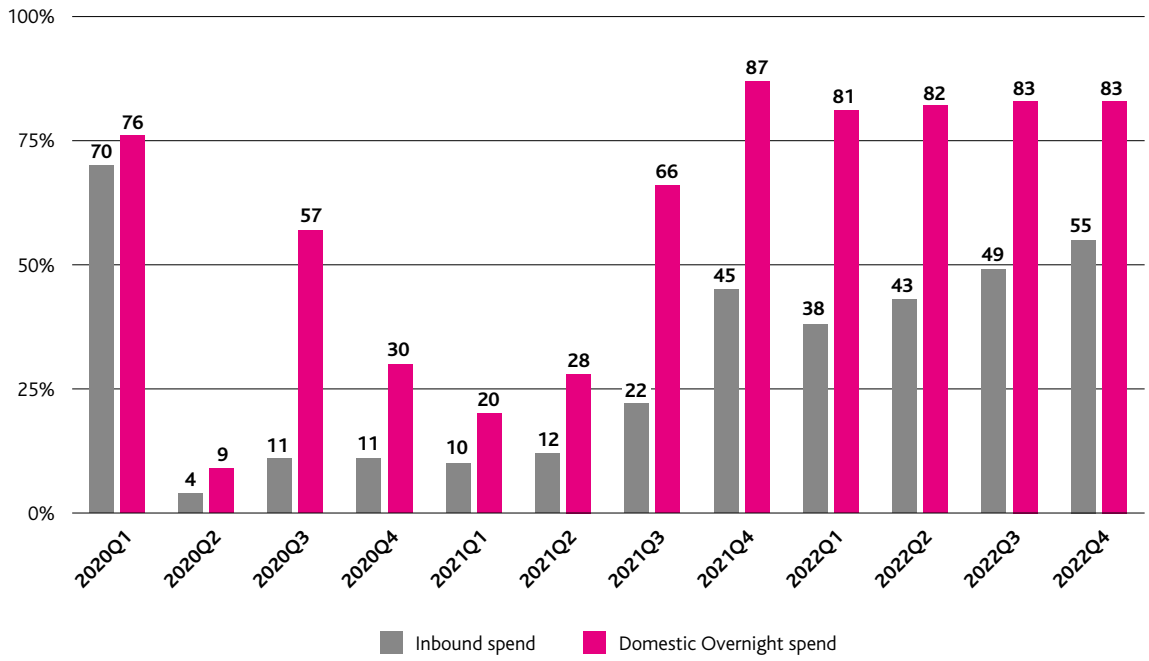
At least £25 billion in COVID-19-related economic support has already been provided by the UK government to the tourism, hospitality and leisure sectors since March 2020. This includes:

- £12 billion so far from the Coronavirus Job Retention (or furlough) Scheme[28]
- £5 billion from Bounceback loans[29]
- £2.5 billion so far from the VAT cut[30]

At its height, 83% of employees in the accommodation and food sector were on furlough, compared to 30% for all industries.[31]

There are signs of hope, as the latest consumer sentiment surveys show a significant amount of pent up demand. Whilst Oxford Economics forecasts show that inbound tourism spend is still projected to be down to 45% of 2019 levels by the end of the year, the picture on the domestic side is much brighter. Domestic day visit spend is forecast to recover its pre-pandemic baseline by the close of 2021, whilst domestic overnight spend will recover to 87% of 2019 levels during this time.

Historical and forecast visitor spend as a percentage of 2019 levels



[28] Coronavirus Job Retention Scheme statistics: December 2020 for up to 31 Oct and Coronavirus Job Retention Scheme statistics: February 2021 for CJRS extension from 1 Nov to 31 Jan – combining "Accommodation and Food Services Activities" and "Arts, Entertainment and Recreation" as the closest proxy to the tourism sector

[29] British Business Bank – combining "Accommodation and Food Services Activities" and "Arts, Entertainment and Recreation" as the closest proxy to the tourism sector

[30] In OBR's November 2020 outlook, the scheme was estimated to cost the exchequer £2.5bn across the hospitality and tourism sector in 2020/21. This measure provides support to over 150,000 businesses across the sector. (p178, table A.3.)

[31] ONS Coronavirus Job Retention Scheme statistics: July 2020

Aims and objectives

15. **The UK government wants to build on the UK's position as one of the most desirable tourist destinations in the world and enhance the UK's offer even further by:** effectively showcasing and marketing the country's tourism assets; attracting domestic and international visitors; and seeing a growing, dynamic, sustainable and world-leading tourism sector reaching its full potential, creating jobs and driving growth in every nation and region of the UK. This will take time to achieve. To get there, the government has the following strategic objectives.

For the short to medium term:

- **Objective 1: A swift recovery back to 2019 levels of tourism volume and visitor expenditure.** The UK government wants as much of the domestic industry as possible to get there this summer; the steps already made towards reopening, providing economic support and easing planning regulations will support that to happen, but it can only be fully achieved once all remaining restrictions are removed. The aim is to have recovered annual domestic overnight trip volume to 99 million and spend to £19 billion by the end of 2022. Inbound tourism is more challenging, due to uncertain factors such as the pace of the vaccine rollout in key inbound markets and the need to be vigilant about Variants of Concern. The ambition is for annual inbound visitor volume to return to 41 million and spend to return to £28 billion by the end of 2023.

And for the medium to long term:

- **Objective 2: As tourism recovers and then exceeds 2019 levels, the government wants to see the benefits shared across every nation and region.** The aim is for visitor spending to grow year-on-year in every nation and region of the UK, with visitors staying longer (measured by average length of stay) and growing accommodation occupancy rates in the off-season. In particular the aim is to reduce the UK's 'balance of trade' deficit between domestic and overseas spending by UK residents, by boosting domestic tourism.[32] This objective also demands a fast, well-connected transport offer across the whole passenger journey, particularly for rural destinations.
- **Objective 3: To build back better with a more productive, innovative and resilient tourism industry.** That means making full use of digital, technology and data to engage new audiences, enhance the visitor experience and provide an offer that continues to meet consumer expectations. It also means an industry employing more UK nationals in year-round, quality jobs, supported by the government's skills agenda.
- **Objective 4: A tourism industry that contributes to the enhancement and conservation of the UK's cultural, natural and historic heritage and minimises damage to the environment.** The UK government wants to boost visitor numbers in a safe and manageable way for local areas, allowing people, communities and businesses to reap the benefits of tourism whilst preserving built and natural assets.
- **Objective 5: A tourism industry that provides an inclusive and accessible offer that is open to all.** The UK government wants the UK's tourism offer to be considered the most accessible of any in the world and to maximise the value of the 'purple pound', which is the spending power of people with access needs.[33]
- **Objective 6: For the UK to be a leading European nation for hosting business events.** For the tourism sector as a whole to recover, and in order to deliver this Plan, the business events sub-sector has to be firing on all cylinders. The government wants to improve the attractiveness of the UK's already strong offer and become the World's Meeting Place, with the UK creating more business events, attracting more to our shores and growing international audiences – leveraging the attendance of government ministers to do so.

[32] UK residents spent £62.3 billion on visits overseas in 2019, whilst Overseas residents only spent £28.4bn on visits to the UK – a difference of £33.9bn, ONS

[33] https://www.visitbritain.org/business-advice/value-purple-pound

Approach to delivery

16. **The UK government recognises that these objectives will not be achieved overnight.** It will take time, cross-government coordination and extensive collaboration with the tourism sector. The government also recognises that there will continue to be a degree of uncertainty over the shape that future travel and tourism will take as the world emerges from the pandemic, making it difficult for both government and business to be precise in their planning.

17. **This Plan represents the first step toward recovery.** It sets out a framework for tourism policy running up until 2024. The UK government will revisit and update the plan as appropriate, to ensure the right policy interventions are in place at each stage of the recovery and to ensure that the sector that recovers is more resilient, more productive and more sustainable than the prior to the pandemic.

18. **To achieve the first two objectives – recovering swiftly in every nation and region – the first priority has got to be getting the tourism sector reopened again, back to earning a profit and paying off debts incurred during the pandemic.** That is why this Plan begins by setting out action, much of which is already in place or underway, under the following three themes:

- **Reopening safely** – by taking a scientific and evidence-based approach to restarting both business tourism and inbound/domestic leisure tourism. This theme recognises that whilst many consumers are keen to travel again, consumer sentiment data shows that many remain nervous about the safety of doing so.
- **Supporting business** – by continuing to provide targeted support to businesses across the sector where it is needed, not least via the continued UK-wide VAT cut and Job Retention Scheme announced by the Chancellor in the 2021 Budget.
- **Stimulating demand** – across the UK, but particularly in parts of the country which are expected to recover slowest, such as 'gateway cities' like London, Birmingham and Manchester that disproportionately rely on inbound visitors, through measures such as promoting consumer confidence and marketing activity led by VisitBritain and VisitEngland.

19. **In the medium and long term, the UK government's focus will move towards working with industry to build back better.** The Tourism Recovery Plan therefore goes on to set out further action under each of the five medium to long term objectives.

20. **The pandemic has highlighted gaps in the robustness and coverage of tourism data at a national level.** The government acted quickly during the pandemic to put in place data collection mechanisms to fill some of these gaps. Examples include VisitBritain's Consumer Sentiment Tracker,[34] the Office for National Statistics Business Impact of COVID-19 Survey,[35] and the Department for Digital, Culture, Media and Sport Coronavirus Business Impact Survey.[36] Furthermore, the government commissioned Oxford Economics to provide detailed forecasts of future demand, with regular updates as the pandemic evolved.[37] Data will continue to be critical to delivering this Plan. The government will continue to make sure that public and private actors in the tourism sector have timely access to data on the ongoing impacts of the pandemic, the pace and nature of the sector's recovery and consumer expectations and behaviour.

[34] VisitBritain COVID-19 Consumer Sentiment Tracker. (https://www.visitbritain.org/covid-19-consumer-sentiment-tracker)
[35] IBID
[36] Department for Digital, Culture, Media and Sport (https://www.gov.uk/government/statistics/dcms-coronavirus-impact-business-survey-round-2)
[37] IBID


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Working in partnership

21. **Tourism policy cannot be delivered by the UK government working alone.** All national governments across the world have a role to play in tourism policy, be that through investing in infrastructure, setting taxation, determining the welcome a visitor gets through border and visa policies, or marketing via National Tourist Boards. During COVID-19, the government has had to intervene to a far greater extent than usual, in order to control the spread of the virus, save lives, and mitigate the economic consequences of imposing restrictions. However, it is ultimately the private sector that delivers the vast majority of experiences, transport and accommodation that tourists use, and so this strategy will need to be delivered in partnership with business.

22. **The UK government is committed to working collaboratively across government departments and with the private sector in order to implement this Plan.** Travel and tourism supports, or is supported by, the work of nearly every government department. It is crucial to the success of the UK's museums, landscapes, theatres, heritage and cultural attractions. It not only helps make thriving city centres, but makes a significant contribution to the local economies of market towns and villages, and rural and coastal communities. Accommodation providers from the largest hotels and holiday parks to the smallest bed & breakfasts and self-catered cottages provide tourists with a base, and our pubs, restaurants, bars and cafes provide the hospitality. Tourism is part of a wider transport and infrastructure ecosystem, providing passengers for air, coach, rail, ferry and cruise industries. It is a place-based activity; stimulating local economies, particularly in rural and coastal communities. Multiple government departments have worked collaboratively in developing this Plan, and will continue to do so to deliver it. The Department for Transport will also publish a strategic framework for the future of the aviation sector and the Department for Business, Energy and Industrial Strategy will come forward with plans for the recovery of the hospitality sector.

Box 3: Tourism as a catalyst for the UK's film, heritage, sports and music sectors

Tourism is the golden thread that runs through so much of what the UK does best. The UK's creative excellence has made it one of the most recognised places on the planet. VisitBritain research found that more than 2 million visitors to the UK make a trip to film, TV, music or literary locations and more than 2 million visitors attend a live sporting event each year.[38]

The UK's heritage is a huge draw for visitors, and in turn their spending supports the conservation of the UK's history. For example, the Historic Royal Palaces, which oversees six sites including Hampton Court Palace, is entirely self-funding with 80% of the income generated by international visitors.[39] Heritage sites are among some of the most popular tourist attractions. In England, heritage attractions such as the Tower of London, St Paul's Cathedral and Stonehenge are all in the top 10 most visited paid attractions.[40] Sites managed by Historic Environment Scotland welcomed over 5.2 million visitors in 2019-20 with £1.1 billion of tourism spend generated.[41]

The UK has created some of the most influential and loved cinema and television in the world. Television shows like The Crown, Outlander and Game of Thrones, and films like the Harry Potter and James Bond franchises are driving tourists across the UK by providing a window for international audiences to view the nation's iconic destinations, history and creativity. Research

[38] https://www.visitbritain.org/activities-undertaken-britain
[39] https://www.theartnewspaper.com/news/heritage-organisations-such-as-national-trust-fight-for-survival-post-covid-19
[40] https://www.visitbritain.org/annual-survey-visits-visitor-attractions-latest-results
[41] https://www.historicenvironment.scot/archives-and-research/publications/publication/?publicationId=9d58ac8e-f1ec-4141-a3ca-ac54010fd4d2

shows that almost a third of potential visitors to the UK are keen to visit destinations seen-on-screen.[42] The effects at a local level can be even more profound with visits to Glencoe in Scotland increasing by over 40% in 2014 after it featured in Skyfall, the 23rd James Bond movie.[43]

From world leading festivals like Glastonbury, with audiences of thousands, to intimate local gigs, the visitor economy supports artists, productions and venues up and down the country, as well as their supply chain. Music tourism contributed £4.7 billion in terms of spending to the UK economy in 2019 – up 6% from £4.5 billion in 2018.[44]

Millions of **sports fans** make the pilgrimage to the UK's sports grounds and stadiums which have borne witness to many of the world's most important sporting moments, like Lord's Cricket Ground in London, Old Trafford in Manchester or the Principality Stadium in Cardiff. Sports fans, in turn, are the lifeblood of the sports and recreation sector, with 24% of sport Gross Value Added made up of tourism activity.[45]

23. **Tourism benefits the whole of the UK. As a devolved responsibility of the Scottish and Welsh governments and the Northern Irish Executive,** the UK government will work closely with the devolved administrations to improve tourism for the whole of the UK. Each of the devolved administrations has their own recovery strategy and the UK government will support their efforts, collaborating on shared initiatives. However, the UK government also holds a number of reserved powers that impact the fortunes of the tourism industry across the UK and where possible, this plan contains Union-wide interventions such as the UK-wide VAT cut for tourism and hospitality businesses, which was reduced from 20% to 5% in July 2020, and was extended by the Chancellor until September 2021, before rising to 12.5% for the remainder of the financial year. This VAT cut alone is expected to be worth £5 billion.

24. **The National Tourist Board, the British Tourist Authority (trading as both VisitBritain and VisitEngland) will lead much of the recovery.** Like everyone, VisitBritain and VisitEngland had to adapt swiftly in 2020 to the changing demands of the pandemic. They rose to the challenge, by creating a series of bespoke support funds for English Destination Management Organisations[46] and by working in collaboration with the Tourist Boards of the devolved administrations to develop the UK-Wide 'Good to Go' COVID-19 Secure Industry Standard, currently in use by over 45,000 tourism businesses. Through their marketing, business support, grant funding programmes and position as the government's statutory advisor on tourism policy, VisitBritain and VisitEngland will lead on delivering many aspects of this Plan and have a key role in achieving the overall objectives. VisitBritain will also continue to play an important international marketing and promotion role, working with the GREAT campaign to attract international visitors and promote the UK in key overseas markets.

25. **The UK government will continue to work in collaboration with representatives and businesses from across the tourism industry.** Despite being one of the hardest hit and most affected industries during the pandemic, the tourism industry stepped up during COVID-19 by turning conference venues into Nightingale hospitals and vaccination centres or by using hotels to house the vulnerable. Further, businesses, representative bodies and Destination Management Organisations have regularly provided the UK government with timely data and evidence on the impact of COVID-19 throughout

[42] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_160_-_film_and_tv_locations.pdf
[43] https://presscentre.nature.scot/news/year-of-natural-scotland-boost-for-visitor-numbers
[44] https://www.ukmusic.org/research-reports/music-by-numbers-2019/
[45] ONS Tourism Satellite Account, 2019 Nowcast estimates
[46] Destination Management Organisations (DMOs) are a vital element of the English tourism landscape. They can carry out a variety of roles at a regional and sub-regional level including marketing, place development and business support.

the pandemic, which has proven invaluable in understanding the situation and implementing the right policy response. As the UK government delivers this Plan, engagement will continue with the sector through established government/industry forums such as the Tourism Industry Council, the Events Industry Board and the British Tourist Authority's Tourism Industry Emergency Response group. The government will also continue to engage with businesses and representatives at regional and sub-regional levels.

The Tourism Sector Deal

26. **This Tourism Recovery Plan replaces the Tourism Sector Deal and the International Business Events Action Plan, both published in 2019, but builds upon their foundations.** Close working between the tourism sector and government to deliver a tourism strategy is not new. Indeed, in 2019, both combined to launch the landmark Tourism Sector Deal, which set out an ambitious agenda to increase the productivity of the industry. The Sector Deal was published alongside an International Business Events Action Plan, which set out how the UK government and devolved administrations would work with the business events sector to attract, grow and create international business events held in the UK. However, COVID-19 has in many senses reset the baseline, providing the tourism sector with a far greater set of challenges than when the Sector Deal and Action Plan were published. This Tourism Recovery Plan therefore replaces both documents, but builds upon the foundations they set where appropriate. In particular, the strategic challenges set out in the Sector Deal remain relevant post-COVID, as the industry builds back better towards a more resilient, innovative, sustainable, productive and accessible tourism sector.



Chapter 2: A Swift Recovery

This section sets out the significant range of activity already underway by the UK government to deliver the first objective of a swift recovery outlined in Chapter 1, as well as a number of new interventions.

Reopening safely

27. **The tourism sector will only be able to recover if it can reopen safely and profitably.** This is the first step from which all others follow. Whilst the restrictions that have been in place have been necessary to safeguard public health, they have had an impact on the ability of businesses to trade profitably by artificially suppressing demand. Social distancing, limits on household mixing, quarantine requirements and other measures all combine to put a ceiling on the ability of businesses to recover and unlike many other sectors, the ability of the tourism sector to diversify or move to online operating models is limited. Getting the sector reopened again, in a safe way, is important to the UK economy overall, to individual, community and national wellbeing and recovery, and to those sectors dependent on tourists.

The Roadmap

28. **On 22 February the government published its four-step Roadmap to ease restrictions across England and provide a route back to a more normal way of life.** On 12 April, England moved to Step 2, and on 17 May to Step 3. Whilst Step 2 provided a much-needed shift back towards normality with the reopening of non-essential retail, outdoor attractions, self-contained accommodation and outdoor hospitality, the government took a gradual approach to reopening, prioritising the safe return of outdoor activity and activity within single households to limit the risks of increased virus transmission. Given the reliance of the tourism sector on travel, indoor activities and attractions, and events, it was Step 3 that provided the vital step towards business as usual. This Step opened up all forms of tourist accommodation, almost all visitor attractions and venues (with some limited exceptions like night clubs) and all organised outdoor and indoor events with capacity caps in place.

29. **The scale and speed of the vaccine rollout gives hope that England can get back to enjoying its great tourism offer without restriction in the not too distant future.** It is the government's intention that, as soon as it is safe to do so and subject to meeting the 'four tests', the country will move to Step 4 of the Roadmap. This Step will mean that all legal limits on social contact can be removed, including limits on household mixing indoors which inhibit the ability of many tourism businesses to operate on a profitable basis. The government will continue to assess the measures in place to ensure that the virus, and particularly variants of concern, do not pose a risk to the government's strategy for living with the virus longer-term.

30. **The UK government has established four programmes of work to consider different aspects of how to handle COVID-19 from Step 4 onwards, in order to ensure the country emerges from the pandemic safely and sustainably.** These programmes of work – on COVID-status Certification, Events Research, Social Distancing, and International Travel – will all be important to the full reopening of the tourism sector.

COVID-Status Certification

31. **The government is exploring whether and how COVID-status certification might be used to reopen the economy, reduce restrictions on social contact and improve safety.** COVID-status certification – the use of testing or vaccination data – aims to provide reassurance that an individual is at reduced risk of transmission. The government has set out that COVID-status certification could have an important role to play both domestically and internationally, as a temporary measure. However, the review is ongoing and no final decisions have been made. The government is considering a range of evidence around COVID-status certification and whether it may have a role in opening up higher risk settings safely. The government has committed to setting out the conclusions of the review ahead of Step 4 (no earlier than 21 June).

Events Research Programme

32. **The UK government has continually sought to gather the necessary evidence to enable closed sectors to reopen swiftly and safely.** Overseen by an industry-led steering group and working closely with national and local public health authorities, the Events Research Programme is testing potential approaches to mitigating transmission risks associated with different settings including cultural, sporting and business events. These pilots will provide additional evidence for events organisers on the logistical and practical considerations of reopening events safely, with the ultimate aim of all events returning to business as usual as quickly as it is safe to do so.

Social Distancing

33. **The Social Distancing Review is exploring when and under what circumstances social distancing guidance can be lifted or amended,** and the implications of lifting social distancing for other measures, including face coverings and working from home guidance. This work is developing the safest approach to allow closer social contact between people, and reduce distance requirements within businesses, venues and workplaces. The conclusion will depend on the latest data and evidence on the state of the pandemic and the impact of vaccine effectiveness, as the country progresses through the roadmap.

International Travel

34. **In November 2020, the government published the first Global Travel Taskforce report.** A number of recommendations in the first report have been implemented, and have been instrumental in promoting safe and secure travel where permitted. Interventions included a 'test to release' scheme in England allowing travellers to reduce their period of self-isolation if they receive a negative test result after returning from countries not on the travel corridor list. The Foreign, Commonwealth and Development Office and the Home Office developed communications campaigns for outbound passengers, inbound visitors and consumers, to raise awareness and understanding of these measures

35. **A second Global Travel Taskforce report[47] was published in April 2021.** It set out a risk-based framework to facilitate the safe, sustainable and robust return of international travel, alongside recommendations to ensure readiness for international travel restart, build consumer clarity and confidence, and support a transition to future travel. The ongoing implementation of the wide-ranging recommendations of the report, in a way that is consistent with the science and emerging evidence, will be crucial for supporting the economy and for allowing families and friends to reunite.

36. **On 7 May 2021 the Transport Secretary announced that international travel could begin to safely reopen from 17 May under the traffic light system,** allowing people to travel for leisure to green list countries, and allowing visitors from green list countries to enter the UK without needing to quarantine. The green list will be kept under review to facilitate travel to more countries as it becomes safe to do so.

[47] Report of the Global Travel Taskforce: The Safe Return of International Travel

37. **The government has now equipped people with the ability to prove their vaccination status for outbound travel using the NHS app and an inclusive letter service.** Yet many businesses depend on inbound international visitors for income – particularly in gateway cities like London and Manchester. The government wants to facilitate the safe return of inbound travel and is considering the role of vaccinations in shaping a different set of health and testing measures for inbound travel, where it is safe to do so. Restrictions will be formally reviewed at Global Travel Taskforce checkpoint intervals to take account of the domestic and international health picture. These formal reviews will take place at checkpoints no later than 28 June, 31 July and 1 October 2021.

38. **As the world moves towards coexisting with an endemic COVID-19, the UK will maintain a leadership role within multilateral organisations,** including the International Civil Aviation Organisation and work with like-minded states including the G7, G20 and Five Eyes group to develop strategies for safely reopening international travel. With regard to vaccine certification, the government is engaging bilaterally with a range of international partners, including the potential piloting of digital and non-digital COVID-19 certification. People in England who have both vaccine doses have been able to demonstrate their COVID vaccination status via the NHS app since 17 May.

39. **Longer term, the UK is continuing to engage with international partners to facilitate the safe and sustainable restart of international travel and to foster cooperation on some of the shared challenges and opportunities in the global tourism industry.** The Minister for Tourism represented the UK at the G20 Tourism Ministerial meeting in Rome, which focused on making travel safe and resilient from a health perspective and improving the impact of travel on environmental sustainability. The UK will continue to exchange information and best practice with global organisations such as the OECD, UN World Tourism Organisation and the World Travel and Tourism Council.

Safety

40. **Evidence suggests consumers are now placing a greater premium on safety in their booking decisions than they did before COVID-19.** In May 2020, VisitEngland and VisitBritain launched a COVID-19 Consumer Sentiment Tracker,[48] monitoring consumer attitudes towards domestic and foreign holidays during the COVID-19 period over multiple waves, with a particular focus on barriers to and concerns around travel. Findings suggest that evidence of enhanced cleaning regimes in accommodation is essential in order to boost consumer confidence in staying. The use of face masks by staff and guests, and careful management of communal areas, are also considered important. During the summer of 2020, tourism businesses undertook steps to become COVID-Secure as they reopened, and to follow government guidance on social distancing and other safety measures. This consumer sentiment research shows the importance of continuing to follow COVID-Secure practices not only to stem the spread of the virus but to attract consumers for whom this remains a top priority.

41. **Throughout the pandemic, the government has implemented a number of initiatives to facilitate the safe reopening of the tourism sector.** These include:

- The creation of comprehensive **COVID-19 secure guidance for (i) the Visitor Economy**[49] – covering guest accommodation, attractions and business events; **(ii) for Hotels and Other Guest Accommodation**[50] and **(iii) for local authorities on Organised Events**.[51] More specific guidance from industry bodies such as UK Hospitality, the Association of Event Organisers and the Events Industry Forum supplemented this. This guidance has continued, and will continue, to be updated to reflect the latest rules and regulations.

[48] IBID

[49] https://www.gov.uk/guidance/working-safely-during-coronavirus-covid-19/the-visitor-economy

[50] https://www.gov.uk/guidance/working-safely-during-coronavirus-covid-19/hotels-and-other-guest-accommodation

[51] https://www.gov.uk/government/publications/coronavirus-covid-19-organised-events-guidance-for-local-authorities?utm_medium=email&utm_campaign=govuk-notifications&utm_source=3e04e5f4-34af-479a-bda7-ffc6812ab851&utm_content=daily

- VisitEngland, in collaboration with the National Tourist Boards of the devolved administrations, launched the **'We're Good to Go**' COVID-19 secure industry standard. This standard, in use by over 45,000 tourism businesses across the UK, demonstrates to consumers that tourism businesses have taken steps to comply with government COVID-secure guidance. In January 2021, the scheme was adapted to allow businesses to download a personalised certificate certifying compliance with COVID-secure rules and to enhance a searchable map to improve online booking potential. In late February, VisitBritain partnered with the World Travel and Tourism Council to ensure 'We're Good to Go' accredited businesses would also be issued with the global 'Safe Travels' stamp.
- **VisitBritain has regularly updated public-facing pages with information on the latest regulations and guidance about travelling safely,** and communicated with tourism sector businesses and industry bodies to ensure they were up to date on what was required to reopen safely. The We're Good To Go programme, free to access, also enabled customers and businesses to check that they had followed all government guidance.
- A **£10 million Kickstarting Tourism Package** was introduced in the summer of 2020, which provided English tourism businesses with funding to adapt to the pandemic, for example by purchasing new equipment to make their business COVID-secure.
- A **£50 million Reopening High Streets Safely Fund**, which provided English councils with funding to support safe reopening via measures lasting until the end of March 2021. More recently, a **£56 million Welcome Back Fund was announced by the Communities Secretary in March 2021.** This funding is helping councils prepare for the safe return of shoppers and tourists, including employing extra staff to keep festivals and events COVID-19 secure. The Fund includes additional support for coastal tourism destinations.
- The Ministry of Housing, Communities and Local government produced **guidance for owners and operators of beach, countryside and coastal destinations**, addressing the challenges associated with increased visitors during the pandemic.[52]
- **VisitEngland and VisitBritain recommenced marketing activity in April 2021 following the move to Step 2 of the Roadmap.** The messaging focused exclusively on encouraging safe and responsible travel.

42. **The government recognises that further support is needed to ensure the reopening and restarting of domestic and international is as smooth and as safe as possible.** The government will therefore take the following steps:

- **VisitEngland will retain the We're Good to Go industry standard so long as COVID-19 restrictions remain in place,** so that the accreditation continues to support industry coming out of those restrictions and continues to provide confidence to consumers. There will continue to be a process of unannounced spot-checks to ensure businesses are complying with the rules governing the standard, and VisitEngland will work, in collaboration with the devolved tourist boards, to further improve take-up of the accreditation by tourism businesses.
- **The government will work with VisitBritain to develop clear and easily accessible public communications products,** online and in print media, to explain the restrictions in place for businesses and both domestic and inbound travellers to boost consumer confidence. This will build on VisitBritain's 'Know Before You Go' website which explains the rules for travel across Great Britain and Northern Ireland.

[52] https://www.gov.uk/government/publications/covid-19-guidance-for-managing-beaches-the-countryside-and-coastal-areas



- **To bolster international marketing efforts, the government has launched the refreshed GREAT Britain & Northern Ireland Campaign.** The GREAT Campaign, first launched a decade ago to capitalise on the opportunities presented by 2012 – a year in which the country celebrated HM The Queen's Diamond Jubilee and the UK hosted the Olympics and the Paralympics. Since then it has become one of the world's most successful and recognisable nation branding and investment programmes. The new GREAT Campaign will showcase the UK's diversity, tell unexpected and surprising stories about UK excellence, and position the UK as open and welcoming to the world.
- **The Foreign, Commonwealth and Development Office (FCDO) will continue to keep its travel advice under constant review to ensure it reflects the latest assessment of risks to British nationals.** FCDO travel advice provides information to help British nationals make informed decisions about foreign travel. The FCDO has been working with industry to deliver the Travel Aware campaign.[53] The FCDO will continue to work closely with the travel and insurance industries to run targeted travel aware campaigns to ensure the British public have relevant and up to date information on procedures and requirements for travelling overseas and to be able to make informed decisions about their safety and well-being, consistent with UK travel advice.
- **As outlined by the Global Travel Taskforce, the government will restart international cruises alongside the wider restart of international travel,** in line with the "traffic light" system. This will be subject to continued satisfactory evidence from domestic cruise travel restarting at Step 3 of the Roadmap; the government will monitor this as well as successful cruise operations elsewhere in the world. The cruise sector has made significant strides in the past year, producing the UK Cruise COVID-19 Framework documents to inform health protocols on cruise ships which were recognised as good practice by the UN International Maritime Organisation and the UN World Tourism Organisation.

[53] https://travelaware.campaign.gov.uk/

Supporting businesses

43. **For much of the last year, businesses across the tourism sector have seen significant cash flow problems** created by substantial falls in demand alongside large-scale cancellation of forward bookings, customer refund requests and issues with insurance payouts.Government cannot save every business, nor every job. Estimates range from between 10% and 25% of the tourism workforce having been made redundant, with higher rates for some sub-sectors like tour operators and the events industry.[54] The sector has also seen a steady flow of insolvencies[55] over the year, is now significantly more indebted than it was before the pandemic and will be low on working capital for some time. However, government intervention has helped mitigate job losses, alleviate damage to supply and stimulate demand upon reopening. Oxford Economics analysis suggests that in absence of government intervention, 1.06 million jobs in travel and tourism were at risk over 2020 but because of measures like the furlough scheme, 1.02 million of these jobs were saved.[56]

44. **The UK government will continue to play its part in helping tourism businesses return to profitability,** so they can begin paying down their debts. The success of businesses across the sector is vital to the government being able to deliver the long term post-COVID-19 tourism recovery objectives.

Support in place

45. **Much of the policy required to support tourism businesses is already in place.** Throughout the pandemic, the government has acted swiftly to safeguard jobs, with world-leading pan-economic measures. At least £25 billion specifically has been provided to the leisure, hospitality and tourism sectors, and some support is scheduled to be in place for the remainder of the financial year. The following measures are in place to help the sector reopen and recover:

- The UK-wide **Coronavirus Job Retention Scheme**, which at its peak supported 87% of hospitality and entertainment businesses, has been extended until the end of September 2021.[57]
- The UK-wide **Self-Employment Income Support Scheme**, which was taken up by around 65% of self-employed individuals in the hospitality and entertainment industries, has been extended so that a fifth grant will support individuals from May to September 2021.[58]
- **A UK-wide cut in VAT for the tourism and hospitality sectors from 20% to 5%**, is in place until the end of September 2021. This was implemented in July 2020. To help businesses manage the transition back to the standard rate, a 12.5% rate will then apply for a further six months, until 31 March 2022.
- A **100% business rates relief for retail, leisure and hospitality businesses in England** is in place until the end of June, and for the remaining 9 months of the financial year rates will be discounted by two thirds. The rates relief was in place throughout 2020-21 and in May 2020, around 82% of accommodation and food businesses were making use of it.[59]
- The Chancellor announced in the March Budget that to further support the hospitality industry and its suppliers, **the duty rates on beer, cider, wine and spirits will be frozen for another year.** Alongside hospitality, this will help the thousands of hoteliers and other accommodation businesses selling alcohol on their premises.
- **Restart Grants** worth up to £5 billion are currently supporting tourism businesses across England with costs associated with reopening. These grants follow an extensive list of grant support over 2020-21, including cash grants of up to £25,000 for retail, leisure and hospitality businesses in England at the outset of COVID-19, followed by the Local Restrictions Support Grants, the Closed Business Lockdown Payment in January and one-off grants for wet-led pubs.

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[54] Internal DCMS estimates
[55] List of ATOL company failures: https://www.caa.co.uk/ATOL-protection/Make-an-ATOL-claim/Latest-ATOL-holder-failures/
[56] Oxford Economics forecasts: https://www.gov.uk/government/publications/tourism-recovery-plan
[57] https://www.gov.uk/government/collections/hmrc-coronavirus-covid-19-statistics
[58] https://www.gov.uk/government/collections/hmrc-coronavirus-covid-19-statistics
[59] ONS BICS survey, wave 22

- The **Additional Restrictions Grants** pot was increased to over £2 billion at Budget with an extra £425 million. This is allowing Local Authorities in England to provide support to businesses not supported by other grant schemes, at their discretion. Tourism businesses potentially eligible for this funding include tour operators, online travel agents, coach companies, group travel companies and Bed and Breakfasts that pay council tax. Earlier in the pandemic a similar £617 million Local Authority Discretionary Grants Fund provided support to businesses in England that were ineligible for other grant schemes (e.g. Bed and Breakfasts that pay council tax instead of business rates);
- **The UK wide Recovery Loan scheme** provides lenders with a guarantee of 80% on eligible loans between £25,000 and £10 million. It follows the Coronavirus Business Interruption Loan Scheme and the Bounce Back Loans in 2020-21. 46% of businesses working in the accomodation and food sector have made use of government backed loans, the highest of any economic sector and the government has made a series of changes to the Bounceback loan schemes to relax the repayment terms.[60]
- **The moratorium on landlord's ability to forfeit leases of commercial property for non-payment of rent** has been extended until the end of June 2021 and the government recently concluded a call for evidence on the best way to withdraw or replace these measures.[61]

46. **Throughout the pandemic, the UK government has also implemented a series of more targeted schemes directly focused on sectors that support, and are supported by, the tourism industry.** These include:

- **The £220 million Cultural Investment Fund (CIF), a landmark investment in regional cultural infrastructure.** Three competitive funds in the CIF package will bolster investment in the country's cultural assets through awarding up to £42 million this year, including those that provide a significant draw for tourists. The package includes a Museums Estates and Development Fund; a Libraries Improvement Fund; and the second round of the Cultural Development Fund, which provided £20 million in its first round to allow towns and cities to invest in creative, cultural and heritage initiatives that lead to culture-led economic growth).
- **The £1.57 billion Culture Recovery Fund**, which has provided support to performing arts venues, heritage sites, science centres, independent cinemas, music venues, museums and cultural organisations – many of which are major visitor attractions. The fund was **extended by £300 million into this financial yea**r to continue to support key national and local cultural organisations in England. The government will continue to invest in culture, heritage and the creative industries post-pandemic, ensuring that all places across the country can prosper, unleash their full potential, and use their cultural, creative and heritage assets to attract tourists.
- A **£1.3 million Destination Management Organisation (DMO) Resilience Schem**e, which provided financial support to England's DMOs during the first lockdown in 2020, so they could continue carrying out their vital business support roles. **A further £1 million was provided to DMOs** facing significant drops in commercial revenue, via two rounds of the Emergency Financial Assistance Fund, providing support until the end of March 2021. Without this funding, many DMOs would not be here to help the sector recover at a regional level.
- **The £80 million Green Recovery Challenge Fund** supports organisations to create and retain jobs in delivering nature-based projects that restore nature, tackle climate change and connect people with the natural environment. This will help to drive sustainable and environmentally positive recovery across the country. A number of successful Round 1 projects seek to improve national parks/nature reserves, enhance urban greenspaces, or support recovery of iconic or native species, whilst improving access and engagement, thereby contributing to the local tourism economy. One such project is from the Suffolk Wildlife Trust, who have been awarded a grant of £250,000 to invest in staff, visitor infrastructure and habitat management across three nature reserves, which will increase visitor engagement and boost ecological and financial sustainability. Round 2 opened for applications in March 2021 and grants will be awarded in the summer of 2021.

[60] ONS BICS survey, wave 22
[61] https://www.gov.uk/government/consultations/commercial-rents-and-covid-19-call-for-evidence

- **Financial support for English airports and the ground handlers serving them**. The Airport and Ground Operations Support Scheme provided support for eligible businesses, covering the equivalent of their business rates liabilities or COVID-19 losses – whichever is lower – in the 2020-21 financial year, subject to certain conditions and a cap per claimant of £8 million. In the Budget, the Chancellor announced a six month renewal to the scheme from 1 April 2021 for the first six months of the 2021/22 financial year, subject to certain conditions and a cap per claimant of £4 million. The renewed Scheme will be open for applications by the end of May 2021 and payments will start to be made at the end of the summer.

47. **The pandemic has highlighted the challenges of communicating with tourism businesses, especially small and medium sized enterprises, which in 2019 made up 99%[62] of the 230,000 businesses in the sector**. In order to increase engagement and raise awareness of the support available to businesses as well as upskill businesses in areas such as digital marketing, VisitEngland embarked on a programme of virtual roadshows. The roadshows have so far reached more than 8,000 small and medium sized businesses, and a second wave of roadshows is currently taking place.

Further action

48. **Taken together, the package of support already in place to support the tourism sector, represents one of the most comprehensive packages of support in the world for tourism.** Emerging from the pandemic, support for tourism businesses needs to continue and longer term action is underway to achieve this, including:

- **A consultation on aviation tax reform**, which considers options to reduce the Air Passenger Duty (APD) on domestic flights to support Union and regional connectivity. The consultation also seeks views on supporting the UK's commitment to net zero emissions by 2050 by increasing the number of international distance bands.
- **A commitment to review the current Package Travel Regulations in the UK, with a view to enabling businesses in the visitor economy to offer greater choice to consumers.** In the meantime, the government will work with industry to identify whether changes could be made to the guidance[63] around these regulations to provide more flexibility to businesses and retailers while protecting consumer rights.

49. **The UK government is aware that there have been calls from some quarters for the introduction of a 'Tourism Tax', or 'visitor levy'** in England. The UK government continually keeps the tax system under review, but currently has no plans to introduce a tourism tax.

50. **VisitBritain and VisitEngland will continue to support businesses as they emerge from the pandemic.** The UK government awarded them £5 million of additional funding in their 2021-22 Spending Review settlement to assist with this, and the funding will in part be used to further their business support activities, including the rollout of further workshops targeted at small and medium sized enterprises. It will also allow continued support to the Tourism Exchange Great Britain (TXGB) business-to-business platform.[64] This innovative platform was funded by the government's £45 million Discover England Fund. It links up tourism suppliers in England with international distributors so that online booking sites like Booking.com and Expedia can more easily sell English tourism products through the global tourism distribution landscape. All sorts of tourism products can be sold via the site, including accommodation, tours, attraction tickets, experiences and transportation – for example the Rugby League World Cup has partnered with TXGB to provide fans with a one-stop platform for their Rugby World Cup ticketing needs.

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[62] ONS, UK business: activity, size and location

[63] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/967428/package-travel-and-linked-travel-arrangements-regulations-2018.pdf

[64] https://www.txgb.co.uk/about

Box 4: The Discover England Fund – showcasing England's world-class visitor offer

In 2015, the government announced the £45 million Discover England Fund, a significant investment in developing pre-bookable tourism 'product' – experiences, curated itineraries, and new touring routes – that aimed to strengthen and diversify the country's offer to international tourists and make it more appealing and compelling. Developing 'product', like Route 66 in the USA, often requires an initial investment, but in the long term can reap significant and sustainable returns.

The fund, managed by VisitEngland, aimed to raise international awareness of the wide variety of destinations, activities and experiences available beyond London, given the majority of inbound visits and spend have historically taken place in the capital, and also focused on developing easy-to-book, pre-packaged rail and bus passes, to give overseas visitors the confidence to explore the country sustainably. Finally, in recognition of the ever-growing consumer demand for fast, easy online booking, the Fund aimed to develop the English tourism sector's digital skills and expertise, so that the experiences, tours and itineraries created could be made available to potential tourists on the other side of the world, and be booked swiftly and easily online.

Over the past five years, the Discover England Fund's grant funding has supported 51 projects in every region of England to develop more than 750 bookable products and work with international travel trade companies to promote these products to overseas consumers. 76 Destination Management Organisations have taken part in the programme, and there are projects in every region of the country, with the funding often the catalyst for destinations and key stakeholders to work together for the first time. The England's National Parks Experience Collection saw ten National Parks collaborate, along with local businesses, to offer an exciting range of new, pre-bookable experiences – from foraging in Exmoor to stargazing in the North Yorkshire Moors. The England's Coast project has brought together almost 2,000 coastal businesses to develop a cohesive coastal tourism offer, including customisable itineraries, aimed at domestic and European markets.

Though the pandemic hit at a difficult time for Discover England Fund projects – just when they were starting to see significant interest and bookings from target overseas markets – the initiative has nonetheless produced impressive results. VisitBritain's pre-Covid international marketing of Discover England Fund products has generated a 22:1 return on investment, and products are already seeing interest from overseas markets for this year and beyond. VisitBritain estimates that their marketing of Discover England Fund products over the year ahead will deliver a 10:1 return on investment, showing the role these products have to play in supporting recovery.

In addition, last year – for the first time ever – the fund's products were promoted to domestic consumers, and this is set to continue through VisitEngland's Escape the Everyday campaign over 2021. Many Discover England Fund projects are well suited to meet the renewed interest in outdoor experiences and lesser-known destinations, and the pre-bookable, all-inclusive nature of its itineraries, trails and experiences help to reassure cautious visitors.

Discover England Fund Project Map



Stimulating demand

51. **Whilst protecting tourism supply is vital, the UK government is also keen to support the return of tourism demand.** This is key in order to meet the aim of recovering domestic demand to 2019 levels by the end of 2022, and inbound by the end of 2023 – both ahead of where Oxford Economics predict demand to be absent of government intervention. VisitEngland consumer sentiment analysis shows that whilst demand has been in large part artificially suppressed by restrictions put in place to control the virus, COVID-19 has also led to some consumers becoming more risk-averse to protect themselves and others.[65] The UK government will take action to boost both domestic and international demand.

[65] https://www.visitbritain.org/covid-19-consumer-sentiment-tracker

Domestic tourism

52. **Domestic tourism is likely to do well in the short term.** Whilst leisure travel and overnight stays in self-contained accommodation have been permitted in England since 12 April, the return to outbound tourism was not permitted until 17 May and various restrictions on overseas travel remain in place even now. The UK government wants to embrace this opportunity by boosting domestic demand, making domestic stays attractive and marketing the UK's assets. This will be of particular value until inbound travel returns in force. The UK is already seeing positive demand for the restart of domestic cruises, which were able to restart in England from 17 May. Some operators are seeing this as a chance to introduce cruising to a new customer base, with 3 or 4-day trips as an alternative to a staycation. Whilst the outbound travel market will thankfully return as people start to book their holidays overseas, the government also wants to embed domestic travel as a sustained customer behaviour – ensuring not only that people enjoy the Great British Summer in 2021 but that people who take domestic trips across the UK this year do so again and again in years to come.

53. **Whilst there is no room for complacency about boosting tourism in every corner of the UK, the domestic focus will be on driving demand back to 'gateway cities'** like Manchester, as these saw the slowest recovery during the summer of 2020 when some tourism activity was permitted, are generally more reliant on inbound visitors, which will not be able to start returning in substantive numbers until later this year and have the weakest domestic forward bookings. Supporting domestic tourism is good for UK businesses,[66] it helps with levelling-up (domestic visits are spread far more evenly around the UK than international visits) and it's better for the environment. One notable impact of the pandemic is that it led to many UK consumers exploring different parts of the UK for the first time: 58% of tourism businesses in the South West reported an increase in first-time visitors over summer 2020.[67]

54. **The government will implement the following to further stimulate domestic leisure demand:**

- **VisitEngland has already launched a £5.5 million domestic marketing campaign,** picking up the baton from the £14 million Enjoy Summer Safely and £5 million Escape the Everyday campaigns from 2020. These campaigns have been, and will be, delivered in partnership with the industry. For example, the Escape the Everyday campaign last year secured high profile partnerships with Channel 4 and Secret Escapes, and adapted its messaging appropriately as government guidance changed.



[66] Analysis by Skift suggests that the UK has more to gain than all its competitors bar China in converting outbound visitors to domestic: https://skift.com/2020/05/06/the-winners-losers-of-a-staycation-world-ahead/

[67] Great South West Covid-19 Business Impacts survey.

- **The British Tourist Authority will deliver a £10 million consumer promotion with The National Lottery to support the domestic tourist industry.** The initiative will see vouchers, or similar, made available to National Lottery players that will be redeemable at tourist attractions across the UK. The scheme will open in Autumn 2021 to encourage off-season trips in support of the hard-hit domestic tourism sector. Businesses taking part will need to ensure they are using the We're Good To Go industry standard. More information will be made available later in the year.
- **The VisitBritain Shop, having previously been focused on inbound travellers only, will be expanded to include a new ecommerce platform for domestic tourism.** The VisitBritain shop sells attractions and travel products to support holidays and trips throughout the UK. Pre-pandemic the shop generated £1.9 million in profit per year, all of which was re-invested in marketing Britain. Available in multiple languages, currencies and 94 markets, the VisitBritain shop offers businesses cost-effective access to consumers around the world. Domestic travellers will be able to access a wide range of attractions and travel products tailored to the UK market.
- **Working with the Rail Delivery Group, the government and VisitBritain will pursue the development of a new domestic rail tourism product to accelerate the recovery of domestic tourism.** Introducing an offer for domestic tourists will encourage sustainable domestic holiday travel and reduce tourism's reliance on cars. It would build on the success of rail tourism products such as the BritRail pass, which is sold through the VisitBritain Shop and provides international visitors with flexible travel across the network to spread the benefits of tourism across the country, as well as provide discounted attraction entry. The aim is to launch this new domestic rail tourism product later in the year, subject to a successful business case being developed.
- **In April 2021, Natural England and Natural Resources Wales launched a refreshed version of the Countryside Code, to help and encourage people to enjoy the countryside safely and respectfully.** Updates to the Code (first launched in 1951) include advice on creating a welcoming environment when enjoying outdoor space, and a refreshed tone of voice that recognises the significant health and wellbeing benefits that come from spending time in nature. Natural England are also running a long-term campaign to raise public awareness of the Code and encourage behavioural change among visitors to the country's natural places.

Box 5: Supporting recovery in London

London is a global city. Before the pandemic, it was the third most visited city on the planet, welcoming a record-breaking 21.7 million inbound visitors in 2019, accounting for 53% of all visits to the UK, with inbound spend reaching £15.7 billion.[68] It is one of the most 'instagrammed' places in the world[69] as well with iconic attractions and cityscapes, from Buckingham Palace to the London Eye. London is also home to three of the world's most visited museums.[70] With its mix of Royal history, world-class culinary scene and rich cultural diversity, London combines quintessential Britishness with the unique character of a city that has been a global cultural hub for centuries.

The tourism industry is a vital part of London's social and economic life: it accounts for as many as one in seven jobs in the capital and contributes almost 12% of London's GDP.[71] However, along with other UK cities, London has been hard hit by the pandemic. Overseas tourists will spend £7.4 billion less on goods and services in London's economic and cultural centre

[68] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_174_regional_spread_of_inbound_tourism.pdf
[69] https://bigseventravel.com/most-instagrammable-places-world/
[70] http://museums.eu/highlight/details/105664/the-most-visited-museums-in-the-world
[71] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Final_proof_15_Nov.pdf

throughout 2020, while domestic tourists will spend £3.5 billion less, far outstripping the financial impact of the fall in commuters.[72]

London, as the main gateway for international visitors coming to the UK, and as a huge draw for many high-spending long-haul markets, is vitally important to the whole of the UK's competitiveness as a tourism destination. The UK government is committed to spreading the benefits of tourism to all nations and regions of the UK, and promoting London's tourism recovery will be an important part of this wider objective. The measures in this Plan will work towards this:

- VisitBritain/VisitEngland will work in partnership with London & Partners to promote city-breaks in London.
- The Department for Business, Energy and Industrial Strategy will use their data dashboard to monitor economic recovery in London, as well as other cities.
- The UK's internationally renowned national museums and galleries are supported by over £320 million in government funding this year, with seven national museums based in London.
- The Minister for London chairs the London Ministerial Coordination Group which acts as a forum for monitoring economic recovery in London and for cross-departmental cooperation. It is attended by a number of Ministers including the Minister for Tourism.
- The UK government will support the return of major events to London in 2021, such as London International Shipping Week and World Travel Market.

55. **In May, Coventry launched their year as UK City of Culture 2021. As restrictions lift, Coventry will host an exciting year-long programme of cultural events and activities, welcoming visitors from across the UK.** Previous winners of the UK City of Culture competition saw a substantial boost in tourism, investment and support for communities, bringing people together and inspiring local pride. There is an opportunity to continue to harness this power, especially as places recover from COVID-19. The Department for Digital, Culture, Media and Sport is now inviting places across the UK to bid for the 2025 UK City of Culture title, and to put culture and creativity at the heart of their recovery plans. A longlist of six places successful in the first round will be awarded £40,000 to strengthen their long application. The winner will be announced in Spring 2022.

56. **These activities build on a strong track record throughout the pandemic of targeted action to boost tourist demand, where appropriate given restrictions.** For example, in the month of August 2020, as part of the Plan for Jobs, the government launched the UK-wide Eat Out to Help Out Scheme, which provided up to 50% off food or non-alcoholic drinks at participating establishments, up to a £10 discount per diner, Monday-Wednesday. Over 84,000 individual premises participated in the scheme, and the scheme supported over 100 million diners.[73] Data from OpenTable suggests that for much of August restaurant diner volumes were higher in 2020 than in 2019. Furthermore, the government introduced temporary regulations to make it easier:

- To obtain a pavement licence quickly and cheaply to place furniture such as stalls, tables and chairs on the pavement outside their premises enabling them to serve customers outdoors. Whilst these regulations are due to expire in September 2021, the government has set out an intention to extend these provisions for a further 12 months until September 2022, subject to Parliamentary approval.
- For hospitality venues to provide takeaways, including by allowing pubs, restaurants and cafes a temporary permitted development right to operate as a takeaway service when unable to operate normally, which has been extended until 23 March 2022; and by easing restrictions to enable the

[72] https://www.london.gov.uk/press-releases/mayoral/central-london-tourist-spending-to-drop-by-109bn
[73] https://www.ons.gov.uk/economy/inflationandpriceindices/articles/priceseconomicanalysisquarterly/october2020

grant of a temporary off-sales permission to licensed premises that did not have it, allowing the sale of alcohol for takeaway, delivery or consumption outside the premises.

- For businesses to erect temporary structures for event spaces or to operate outside including tents, awnings and portaloos for double the amount of time usually permitted, which has been extended until 31 December 2021.

57. **The Department for Business, Energy and Industrial Strategy has also developed a data dashboard to monitor economic recovery in cities.** The dashboard will be used to inform future decisions on whether further targeted action is required if spending and footfall in city centres do not increase as expected in line with public health measures.

Box 6: 2022 as a springboard for promoting the UK at home and abroad

2022 is a year of celebration for the UK. Her Majesty The Queen's Platinum Jubilee, the Festival UK* 2022, the UK's first small satellite launch from a UK spaceport, and the Birmingham Commonwealth Games will bring people together, inspire the next generation, be a moment of renewal for the UK as the country emerges from the coronavirus pandemic, and amplify key anniversary celebrations of some of our most beloved institutions.

In 2022, the BBC will mark its 100th birthday, the Edinburgh International and Fringe Festivals will celebrate their 75th anniversary and starting this year Coventry will continue to deliver its exciting cultural programme as the UK City of Culture. These events will help accelerate the recovery of the tourism industry, with a series of must-see events that will show the world the UK is open for business. To utilise these milestones to connect the world with UK destinations the government will deliver:

- **A £24 million Business and Tourism Programme** to run alongside the Commonwealth Games, using the showcasing opportunity of sport to drive trade, investment and visitors to the region and the UK. This programme includes funding for VisitBritain to deliver an international tourism campaign.
- **Ten creative teams from across the UK have been selected to develop a series of events, public engagement programmes and virtual projects as part of the Festival UK* 2022.** From augmented reality to space and new works of art, projects will bring science, technology, engineering, arts and maths into the heart of communities across the UK.
- **In 2022 there will be an additional UK-wide Bank Holiday in June to celebrate Her Majesty The Queen's Platinum Jubilee.** This celebration will also give a much needed boost to the UK's visitor economy.
- VisitBritain's overseas teams will continue to promote the diverse range of destinations Britain has to offer, including those with cultural and sporting events taking place in 2022, and shape campaigns to target key markets for these events

International tourism

58. **International tourism has an important role to play in promoting the UK as a soft power superpower and achieving the government's overarching international policy objectives set out in the Integrated Review of Foreign, Defence, Security and Development policy.**[74] The Tourism Recovery Plan will support the UK's objectives of sustaining strategic advantage through science and

[74] Cabinet Office. Global Britain in a Competitive Age: the Integrated Review of Security, Defence, Development and Foreign Policy. March 2021.

technology by being the World's Meeting Place for business events and will create strong people-to-people links and familiarity with the UK's values through cultural exchange and tourism. Soft power also enhances the UK's ability to attract international business, research collaboration and students – and, ultimately, to effect change in the world.[75]

59. **The return of inbound tourism will be slower than that of domestic tourism, and international competition for inbound visitors will be fierce.** The success so far of the UK's vaccine rollout gives the UK somewhat of a competitive advantage, but the UK cannot be complacent. Competitors are setting aside funding to promote their own international tourist industries, but the level of uncertainty over when international travel will be able to restart, as well as the variation by market, makes it difficult to be precise in forward planning. To some extent, an adaptable and fleet of foot approach will be needed for the remainder of 2021, to ensure international activity is as effective as it can be. In particular, the government wants to ensure that marketing activity in the UK's vital inbound markets, such as the USA, the Gulf, France and Germany, is ready to go as soon as travel is able to restart.

The UK's top markets by volume and value: 2019[76]

Top ten markets by volume

	From	Visits (000)	% of all visits
1.	USA	4,499	11%
2.	France	3,570	9%
3.	Germany	3,233	8%
4.	Republic of Ireland	2,851	7%
5.	Spain	2,326	6%
6.	Italy	2,197	5%
7.	Netherlands	1,987	5%
8.	Poland	1,651	4%
9.	Belgium	1,135	3%
10.	Australia	1,063	3%

Top ten markets by value

From	Spend (£m)	% of all spend
USA	£4,184	15%
China	£1,710	6%
Germany	£1,567	6%
France	£1,413	5%
Australia	£1,174	4%
Italy	£1,109	4%
Spain	£978	3%
Republic of Ireland	£958	3%
UAE	£869	3%
Netherlands	£796	3%

60. **Ambitious international marketing activity, led by VisitBritain, is currently being planned for 2021-22.** These campaigns will respond to likely changes in consumer behaviour following COVID-19, such as a renewed and increased desire for experiential travel, and will ensure the UK is well represented overseas.

61. **Furthermore, in July 2020 the government provided backing to the ATOL protection scheme, which has since been extended to September 2022,** meaning consumers will remain protected. This backing allows the Trustees of the ATOL fund to extend protection for Refund Credit Notes. This gives greater confidence to consumers to accept credit notes rather than refunds and greater flexibility to businesses to navigate the uncertainty.

62. **In June 2021, the G7 Summit will be held at Carbis Bay in Cornwall.** VisitCornwall estimates that the Summit could provide a £50 million economic boost to the region. In order to maximise the event's potential to drive global awareness of and interest in Cornwall and the South West region and promote it to international markets as a holiday destination, the Department for Digital, Culture,

[75] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/975077/Global_Britain_in_a_Competitive_Age-_the_Integrated_Review_of_Security__Defence__Development_and_Foreign_Policy.pdf
[76] VisitBritain. International Passenger Survey, 2019 snapshot: https://www.visitbritain.org/2019-snapshot

Media and Sport recently provided £74,000 to VisitCornwall to supplement their promotional activities. The funding supports a comprehensive programme of promotional activity, including content creation and press engagement, to put the area on the map for potential inbound visitors and ensure the event's legacy includes supporting the recovery and eventual growth of the UK's overseas markets for 2022. In addition, there has been significant investment into Newquay Airport to expand its capacity for international travellers.

63. **In addition, the government is committed to supporting those UK assets that draw in domestic and international tourists and developing the country's tourism offer in new ways.** For example, **England's world class museums will remain accessible for everyone to enjoy** and entry to the permanent collections of the national museums will remain free to all. Furthermore, **developing the country's food tourism offer is an exciting area for exploration.** To grow civic pride in local areas and raise domestic and international awareness of the sheer wealth and variety of local food cultures across the country – including in rural areas, where producers are often based – the Department for Digital, Culture, Media and Sport and the British Tourist Authority will explore the ways in which the UK's unique food and drink culture can support and encourage tourism further. This will build on current work, such as VisitBritain's partnership with Food is GREAT, which, in its third year, has worked with the US digital magazine Food & Wine to raise awareness and change perceptions of Britain's exciting modern culinary offer. The campaign used whisky, gin and English sparkling wine to attract US consumers and promote the UK as a gastronomic destination.

Box 7: The World's Meeting Place

The UK is a world-leader in hosting major events and as a globally connected country, the UK can be the World's Meeting Place for diplomacy, business, culture, sport and science. In the coming years the UK will host the United Nations COP26 Climate Change Conference in Glasgow in November 2021, and Birmingham will welcome 72 nations and territories to the 2022 Commonwealth Games. These major events help to raise global awareness of destinations across the UK, fill hotel rooms, and present jobs for local economies.

These events are also platforms to project and develop the UK's global soft power. COP26, for example, will showcase the UK as a leader in tackling global climate change through demonstrating a commitment to promoting the UK as a sustainable tourism destination and promoting the UK as a Science and Technology Superpower.

By building on the UK's fantastic track record of delivering major international sporting events, the UK can leverage the international spotlight and the public's emotional connection to sporting drama to promote the UK's sporting heritage and cultural destinations. From the London Olympics in 2012 to the ICC Cricket World Cup in 2019, the UK has played host to many historic sporting moments, with its cities welcoming thousands of visitors from across the world. Sporting events can create a powerful sense of collective memory for international audiences. As well as the Commonwealth Games in 2022 the UK will host the UEFA Men's Euro 2021 in London and Glasgow, the UEFA Women's Euro 2022 and the 2021 Rugby League World Cup in England, which is receiving £15 million of government funding. The UK and Ireland are working on plans for a joint bid for the 2030 Men's FIFA Football World Cup supported by £2.8 million of UK government funding. UK Sport's Strategic Plan 2021-31 lists the UK's aspirations for the next decade, including 97 events across 44 sports spanning 46 World Championships. Collectively they represent a potential boost to the UK economy of close to £7 billion (£6.83 billion), and would attract over 13 million fans with 95% of the UK population living within two hours of a hosting venue.[77]

[77] https://www.uksport.gov.uk/news/2021/05/06/uk-sport-new-strategic-plan

Chapter 3: Building Back Better

This section sets out how the UK government will work with and support the tourism sector to build back better from this pandemic. That means a more innovative, data-driven, accessible and resilient tourism industry – covering both business and leisure tourism – with less reliance on the peak season. We want to see a thriving tourism sector which is able to attract, train and retain a more skilled workforce all year round. This will mean having the right structures in place to deliver tourism policy at a national, regional and local level.

However, given the impact of the pandemic on balance sheets, the short term focus needs to be on recovering lost ground. As such the UK government does not consider the policy interventions listed in this section of the Plan to be exhaustive; they will be continually appraised and updated as appropriate, to ensure delivery of the overall framework set out in Chapter 1.

Growth in every nation and region

64. **COVID-19, and necessary government interventions to control its spread, have hit the industry hard across the country, but some parts of the country are disproportionately reliant on the visitor economy and these have been particularly damaged.** For example, nine of the ten local authorities with the largest increases in unemployment-related benefit claims early in the pandemic contain important domestic seaside resorts. South Lakes, in Cumbria, saw the highest proportion of workers using the furlough scheme in the country.



65. **The UK government has made a firm commitment to levelling up the country, which it is delivering across multiple policy portfolios.** The tourism sector has an important part to play in this, given the distribution of tourism jobs and the relative importance of the visitor economy to many parts of the country. The Department for Digital, Culture, Media and Sport will work with other departments including the Ministry for Housing, Communities and Local Government to emphasise the role of tourism in this government agenda.

66. **As tourism recovers and then exceeds 2019 levels, the government wants to see the benefits shared across every nation and region.** The aim is for visitor spending to grow year on year in every nation and region of the UK, not only within but beyond the usual tourist 'hotspots' to smaller, lesser-known destinations. The government wants to see visitors staying longer (measured by average length of stay) and growing accommodation occupancy rates in the off-season. To achieve this, the UK will need an offer that continually meets consumer demands and delivers an excellent tourist experience, with the right structures in place to deliver tourism policy and a transport network that improves connectivity across the country.

Investing in local visitor economies

67. **In recent years, the government has announced a range of funds that provide direct place-based investment to local visitor economies.** Capital investment in the country's tourism 'product' is vital to maintaining a unique and attractive visitor offer, all year round, for the years to come. The UK government investment in tourism is already significant, and there are many opportunities and projects in the pipeline for businesses to benefit from. These include:

- **The £3.6 billion Towns Fund,** providing capital funding for 101 towns to develop innovative solutions that will level up their local economies. At the Budget in March, the government announced how over £1 billion of this funding would be allocated to 45 towns across England, supporting their long-term economic and social regeneration as well as their immediate recovery from the impacts of COVID-19. Projects include a new events and convention centre in Southport, and the restoration of Newark Castle.

- **The £1 billion Future High Streets Fund,** part of the Towns Fund, supporting locally-led proposals to redevelop local areas' high streets, including the regeneration of heritage high streets through Historic England's High Streets Heritage Action Zones programme. For example, the Ryde High Street Heritage Action Zone on the Isle of Wight will give old buildings new uses that support the vitality of the town centre, including increasing visitor accommodation and offering 'creative space' for innovative new businesses and cafes. The scheme will create a dedicated pedestrian zone, improving the paving and street furniture.

- **The £900 million Getting Building Fund,** supporting the delivery of shovel-ready infrastructure projects, many of which will benefit local visitor economies, such as the regeneration of Great Yarmouth Seafront or developments to the UK's busiest cruise port, Southampton, to create a new fifth cruise terminal.

- **The £220 million UK Community Renewal Fund, for which a prospectus was launched earlier this year.** This Fund aims to support people and communities most in need across the UK to pilot programmes and new approaches and will invest in skills, community and place, local business, and supporting people into employment as the government moves towards the UK Shared Prosperity Fund (UKSPF). The UK Community Renewal Fund will help inform the design of the UK Shared Prosperity Fund through funding of one year pilots in 2021- 22, but the Funds are distinct in regard to design, eligibility and duration.

- **The £4.8 billion Levelling Up Fund, which will invest in infrastructure that improves everyday life across the UK up until 2024-25.** The first round of the Fund focuses on three themes, all of which are likely to have clear benefits for local visitor economies. These include transport

developments like developing cycle paths and accessibility features, enabling residents and visitors better access to and travel within destinations; town centre regeneration, making places more attractive to visitors; and finally, maintaining and regenerating much-loved cultural and heritage institutions and visitor attractions, to protect and strengthen the local offer for visitors.

Box 8 – Petersborough Towns Fund Case Study

Peterborough is receiving £22.9 million from the Towns Fund which will be used to boost the city with a wealth of cultural, health and wellbeing and tourism improvements including:

- **The Vine Culture Hub,** a new library, culture and community hub.
- **An extension to the Flag Fen and Whittlesey Heritage Centre** new Bronze Age to house the globally significant Must Farm boats which were discovered at nearby Flag Fen. The long-term aim of this project will be to market the museum as a 'must see' UK and international tourist trail, boosting the local economy.
- **Creating a welcoming entrance to Peterborough** for visitors by developing the Station Quarter that leads people on foot easily towards the city centre.
- **Improvements to Peterborough's river frontage** onto the River Nene, making it an attractive place for residents, workers and visitors to spend time throughout the seasons. This will include lighting, seating and footpaths designed to maximise the view of the river.

68. **The UK government also has a long track record of UK wide investment in tourism through the City Region and Growth Deals,** which provide funding for projects specifically tailored to the needs and strengths of individual regions. These deals, in place across the UK, often invest in tourism infrastructure projects, such as the Lilidorei Play Village at the Alnwick Garden in Northumberland, supported via the Borderlands Growth Deal, or investment in Inverness Castle via the Inverness and Highlands Deal. At Budget 2021, the government accelerated its investment in three Growth Deals in Scotland (Ayrshire, Argyll and Bute, and Falkirk), and three in Wales (Swansea Bay, North Wales, and mid-Wales). Over £84.5 million will be invested over the next five years in local economic priorities, including visitor economy projects. Additionally, in February 2021, the government signed the Heads of Terms for the Derry-Londonderry and Strabane City Deal, contributing £105 million for proposals that include investing in regeneration and tourism. The government has also signed the Heads of Terms for the Islands Growth Deal which will invest in the future economic prosperity of Orkney, Shetland and the Outer Hebrides. This includes the Outer Hebrides Destination Development project which will focus on key aspects of island heritage such as St Kilda, the world renowned Callanish standing stones and experiences based on the history of the islanders.

69. **Separately, the five rounds of the Coastal Communities Fund has delivered £229 million in 396 projects UK-wide,** and since 2015, the Coastal Revival Fund has provided over £7.5 million to support 184 projects in coastal areas to help kick start regeneration of 'at risk' coastal heritage. This includes £800,000 for the Cleveland Ironstone Mining Museum. Based in Skinningrove, Cleveland, this 2-year project has improved the sustainability of the museum by extending the existing building to provide improved facilities including a walk-round interactive museum, artefact storage, exhibition space, classroom, meeting room, conservation workshops, offices and toilets allowing all year round opening and capacity to stage more events to generate revenue.

70. **Since 2016, the £45 million Discover England Fund has supported the development of innovative and world-class English tourism products, itineraries and experiences, encouraging people to explore the regions and helping to extend the traditional tourism season.** In 2020, project grant

funding was refocused to take advantage of the opportunities offered by the domestic market, for the first time ever. Successful projects include the Great West Way, a 125-mile touring route from London to Bristol, passing through a number of historic market towns such as Marlborough, villages and heritage sites, which now has over 270 ambassadors investing in it, including Bristol Airport, and has taken 450 bookable products to international and domestic markets.

71. **In order to make the most of all that Great Britain has to offer visitors and provide a truly cohesive offer, the Department for Digital, Culture, Media and Sport and the British Tourist Authority will explore the potential to continue and expand some of the world-class projects developed by the award-winning Discover England Fund beyond the English borders and into Scotland and Wales,** building on the recent expansion of the National Parks Experience Collection to cover Wales. This will include facilitating conversations between devolved administrations and established Discover England Fund projects who wish to extend and collaborate in this way.

72. **The government consistently invests in the UK's cultural attractions, which are the top reason tourists choose to come here, and museums are the top cultural product associated with the UK.** Our internationally renowned national museums and galleries are supported by over £320 million in government funding this year. The government also invests in the arts and cultural sector through Arts Council England. At Budget 2021, the government announced an £18.8 million investment in local cultural infrastructure projects in Carlisle, Hartlepool, Wakefield and Yeovil to boost the vibrant cultural life of these towns and cities. The funding, delivered by Arts Council England in 2021-22, includes £10 million to renovate and expand the Octagon Theatre in Yeovil, £5 million to regenerate Wakefield's High Street and £2 million for Carlisle's Tullie House Museum and Art Gallery to better showcase its collections for visitors, and £1.8 million to develop the historic Borough Hall in Hartlepool into a new cultural destination.

73. **Taken together, the above programme of investment will help ensure the UK's tourism offer delivers a quality visitor experience all year round.** Other measures outlined earlier in the plan will help tackle seasonality too, such as the National Lottery funded domestic tourism voucher scheme.

74. **Whilst the 2019 Sector Deal introduced the idea of piloting Tourism Zones across the country, it is the government's view that much of what Tourism Zones aimed to address – such as improving digital skills, place-making and seasonality – can now be accomplished with the significant levels of funding outlined in this Plan,** such as the new Help to Grow: Digital scheme, the £220 million Community Renewal Fund, and the £4.8 billion Levelling-Up Fund. These investments in local communities will help level up the visitor economy and support UK destinations. Although creating a separate set of Tourism Zones is no longer the right solution post-pandemic, the government and the British Tourist Authority will work together to support destinations to bid for these skills, innovation and place-based investment funds for tourism projects, and Destination Management Organisations will have an important role to play in this effort.

Structure

75. **Recognising the importance of having a solid foundation for the sector, in March 2021 the government launched an independent review of the structure, funding and performance of Destination Management Organisations (DMOs) in England.** The independent review is being led by Nick de Bois and will make recommendations on how best to structure and, if needed, support DMOs at a local and regional level in order to deliver the government's tourism policy priorities and support sustainable economic growth. The government recognises the impact that COVID-19 has had on England's DMOs, in particular those reliant on commercial income from business members and corporate partners, and the important role DMOs play in supporting and driving English tourism locally, regionally and nationally. They also have a role to play in creating, growing and retaining domestic and international business events and in providing a warm UK welcome to delegates whilst here.

76. **The de Bois Review is undertaking a comprehensive programme of consultation and engagement,** and will report to the Secretary of State for the Department of Digital, Culture, Media and Sport in summer 2021, giving due consideration to and aligning with developments in the wider local and regional landscape as appropriate.



Transport

77. **The government recognises the importance of investing in the country's transportation network to underpin the success of the UK tourism industry.** The UK needs well connected air, sea, waterways, rail and road networks that work for domestic and international visitors and that allow visitors to travel the breadth of the country easily and sustainably, including to rural areas and destinations, where public transport access has historically been a challenge. It will be vital to get tourists back into major cities, including London and Edinburgh, and during their stay they should also be able to access and experience the surrounding areas and further afield without being constrained by the transport on offer.

78. **The UK has a rail network covering the whole country, serving more than 2,500 stations.** Travelling by train is a scenic and relaxing way to discover Britain. This Recovery Plan has already set out plans to introduce domestic rail tourism products, but other interventions are already underway to improve rail connectivity:

- **Government investment in HS2** will make a real difference to tourism businesses in the North of England by providing better connections to domestic and international consumers coming from London
- **£500 million has already been pledged to kickstart the reversal of the Beeching era cut**s in order to bring back historic rail lines and improve connectivity across the country.[78]
- **The Williams-Shapps Plan for Rail has set out how the government intends to transform railways across Great Britain,** making it simpler, easier and more attractive to travel by train. This includes new, easy ways to pay for journeys, an ambitious plan for improving accessibility and

[78] https://www.gov.uk/government/news/government-pledges-500-million-to-bring-back-historic-rail-lines-improving-connectivity-for-communities-across-the-country

making trains more comfortable. It will be more straightforward to bring luggage and bicycles onto trains in the future. Greater local accountability will also make railways more responsive to the needs of local places and improve engagement with local businesses and tourism boards. This will enable the railways to better support tourism and regeneration in coastal communities and scenic landscapes as well as towns and cities.

79. **'Bus Back Better', The National Bus Strategy sets out the vision and opportunity to deliver better bus services for passengers across England, through ambitious and far-reaching reform of how services are planned and delivered.** The Strategy sets out that local authorities should publish a 'Bus Service Improvement Plan' in collaboration with operators and local businesses, services and people, which will set out how they will improve services. In popular tourist areas such as the West Country, the National Landscapes, and market towns and villages, Bus Service Improvement Plans should show how far more will be done to promote buses to visitors, with improved services, easily accessible information, park-and-ride sites and special tickets. Scenic railways, such as the Settle-Carlisle and West Highland lines, are now significant tourist attractions and wealth generators in their own right; the government's view is that several of Britain's equally splendid bus routes should be marketed in the same way.

80. **Coaches are an important part of the UK tourism industry, and play a vital role each year in connecting domestic and inbound visitors with destinations and venues across the country.** Coaches contribute £14 billion each year to the UK economy, and in 2019 the sector facilitated 23 million visits to tourist attractions and locations across the UK.[79] Coaches play a distinctive role for many incoming tourists, providing bespoke routes and trips to destinations which are often not served by other means of transport. Coaches can play an active role in the UK government's 'Levelling up agenda', by providing relatively low-cost transport and a means of inclusive access to destinations for those unable to access other modes of transport. The government will work with stakeholders to seek to emphasise the accessible and flexible nature of coaches.The government will continue to engage with coach operators and with tourism stakeholders to assess how it can support the coach sector's recovery as national restrictions lift. The government will also seek to work with tourism bodies and organisations to explore opportunities to promote the use of coaches, and facilitate and improve coach access to tourist destinations. Parking and accessibility for coaches at destinations will be an important part of encouraging people to use them and the government will explore with stakeholders how these issues might be given consideration.

81. **In order to strengthen links across all four nations of the UK, the government has commissioned Sir Peter Hendy CBE to lead an independent review into Union Connectivity.** This review will make recommendations on how the UK government can level up transport infrastructure and improve connectivity between Scotland, Wales, Northern Ireland and England. It will cover rail, road, air and sea links. His interim report considers the current state of transport connectivity within the UK and makes the case for future investment, including faster and higher capacity connections for passengers from HS2 to Scotland and North Wales, and consequently better freight capacity too. It also makes the case for higher capacity and faster journey times to and from Scotland from England and Wales and Newcastle by rail and road. He is expected to publish his final report setting out his findings and recommendations in summer 2021. Following his interim report, £20 million has already been committed to exploring the development of projects identified by the interim report such as:

- improved rail connectivity between the north coast of Wales and England upgrading the A75 between Gretna, Dumfries and Stranraer – a key route for south-west Scotland and Northern Ireland but almost entirely single-carriageway
- significantly faster rail links from England to Scotland, including looking at options to enhance the West Coast Main Line; and
- rail improvements in south-east Wales, building on ideas from the Welsh government's Burns Commission.

[79] https://www.cpt-uk.org/media/5qiagic1/coach-strategy-full-strategy-document.pdf

82. **The government is working on a strategic framework for the future of the aviation sector.** It will focus on building back better and ensuring a successful UK aviation sector for the future, which will be published later this year. This framework will explore the return to growth of the aviation sector, which will include consideration of workforce and skills, regional connectivity, noise, innovation and regulation, and consumer issues. The framework will also ensure that growth is consistent with the UK's carbon budgets and Net Zero target, as well as the critical role that UK aviation plays in retaining the UK's global reach.

83. **The government is also developing a Maritime Covid-19 Recovery Route Map** to support the long-term recovery of the maritime sector, including cruise and passenger ferries, and to support the sector in tackling the key challenges of the coming years.

Box 9: England's North East: a vision for the future

England's North East offers visitors a wealth of unspoilt natural landscapes such as Northumberland National Park, a stunning coastline, historic heritage including two UNESCO World Heritage Sites,[80] and a cutting-edge cultural sector – all of which should make it a hugely appealing destination for domestic and international tourists.

However, in 2019 the region saw the lowest overnight visits and spend figures for both inbound and domestic markets across England,[81] due to challenges including low international awareness,[82] and domestic perceptions of remoteness – despite recent investment such as the Discover England Fund project the 'North of England Cities Experience', a rail pass allowing visitors to travel easily between Newcastle and four other Northern cities. The variety of destinations, attractions and experiences available makes it an ideal domestic choice for families – who can discover and ancient Roman remains – and 18-34 year olds, who can pack exciting outdoor experiences and shopping in historic market towns into one trip; on the international side, the North East's heritage offer includes castles, abbeys, and stately homes.[83] But this variety can also make it hard for the region to market itself cohesively, and target its offer to match consumer interests and attract key markets.

COVID-19 impacts on the region's coastal communities, rural tourism businesses, and events-reliant places like Gateshead have been significant and prolonged.[84] Just 4% of domestic consumers planning to take a summer trip intend to visit the North East, compared to 11% for the North West.[85] The region's 'undiscovered' nature means it has significant capacity to accommodate growth. Over the long term, and in line with the Tourism Recovery Plan's priorities, the North East's uniquely diverse visitor offer means that there is significant potential for it to target and meet consumer demand strategically to develop a thriving and sustainable tourism industry.

Culture: The North East's cultural offer ranges from Beamish, the Living Museum of the North – a pioneer in accessible tourism via its 'Dementia Friends' programme – to Sage Gateshead, a

[80] Durham Castle and Cathedral, and Hadrian's Wall

[81] 4.3m domestic trips, worth £800m – 4% of total domestic spend in England; 538k inbound trips, worth £369m. This compares to 3.45m visits to the North West, worth £1.62 billion. (Great British Tourism Survey 2019; VisitBritain inbound regional data 2019).

[82] 47% of G20 residents are aware of Newcastle, compared to 73% for Manchester; just 2% have visited it. (British Council Global Soft Power survey 2020)

[83] 47% of inbound visitors to the UK visit famous monuments and buildings, 28% castles and/or historic houses. (VisitBritain activities undertaken in Britain research).

[84] Estimates suggest the region lost £3 billion in 2020. Unemployment benefit claims rose by 35k between March-August 2020; footfall in the North East's cities fell by 30%. (North East Covid-19 Economic Response Group).

[85] https://www.visitbritain.org/sites/default/files/vb-corporate/covid-19_consumer_tracker_wave_28_final.pdf

music centre for the North, which received a £3 million loan from the Culture Recovery Fund. And new cultural developments – like the £1.8 million restoration of Hartlepool's historic Borough Hall announced at Budget 2021 – mean that the North East's world-class arts and cultural offer is continuing to develop and could be promoted to wider culturally-inclined domestic audiences.

Heritage: The region's heritage sites are a strong source of civic pride. The Borderlands Growth Deal will support the development of Hadrian's Wall to appeal to wider markets and will also strengthen Alnwick Castle's year-round offer by providing up to £5 million for the Lilidorei Play Village. The Discover England Fund project 'England's Originals' provides itineraries between Durham and other historic cities, helping visitors explore England's regional heritage.

Natural landscapes: The North East is rich in outdoor landscapes. The region is able to meet demand for coastal destinations: the Durham Heritage Coast leads from Sunderland to Hartlepool, recently receiving Coastal Communities Fund investment for a new community hub at Crimdon. Northumberland National Park is one of the least visited National Parks in England, yet only an hour from Newcastle Airport and the International Passenger Ferry Terminal at the Port of Tyne. With sustainable tourism becoming increasingly important, the Glover Review has recommended that England's National Parks – and Areas of Outstanding Natural Beauty (AONB), like the North Pennines AONB, also a UNESCO Global Geopark – be supported to become leaders in sustainable tourism by working with Destination Management Organisations and Local Authorities.

Transport: The East Coast Main Line connects Newcastle to London in under three hours. However, access to more remote rural and coastal destinations can be challenging. Recognising the importance of strong rail links for tourists and residents, the reversal of the Beeching cuts, and the new £34 million Northumberland line will create new station facilities in historic destinations like Ashington, strengthening connections for local communities.The Explorer's Road Discover England Fund project – a 500km route leading from London to the Scottish Borders – showcases lesser-known destinations. Visitors can drive, cycle, or – thanks to partner LNER – travel by train. On the international side, Newcastle International Airport has strengthened inbound connectivity, with flights to and from more than 70 destinations, while the International Passenger Ferry Terminal provides links with key European markets. Raising awareness of the ease of inbound travel would help grow the North East's international visitor base.

Events: In 2023 the £260 million Gateshead Quays development will open with a new hotel, arena and conference centre. This development strengthens Newcastle and Gateshead's international events capacity, recognising the role the business events sector can play in extending the season, creating jobs, driving long-term regional growth, and promoting the UK's domestic industries globally. The region also plays host to a range of wider events, including Bishop Auckland's live action show Kynren, and the Hartlepool Tall Ships Races, which return to the town in 2023. In autumn 2021, the Rugby League World Cup takes place, with matches held at a number of North East venues. Fans will be able to build and book 'Squad Trips': all-inclusive, packaged weekend breaks – using VisitBritain's Tourism Exchange Great Britain platform (TXGB).

Regional tourism structures: The region's Destination Management Organisations – include Newcastle Gateshead Initiative, Visit County Durham, Northumberland Tourism, and Enjoy Tees Valley, as well as the Local Authority-led tourism offices in South Tyneside, North Tyneside, and Sunderland – play key roles in inspiring people to visit, live, learn, work and invest in the region, often working in collaboration. The de Bois review will recognise examples of best practice among Destination Management Organisations and make recommendations for how to support the recovery and growth of local tourism.

The North East of England is one of Great Britain's hidden gems. The UK government's Tourism Recovery Plan will see its tourism sector strengthened and supported to realise its full potential. It will help the sector to strategically target key markets and drive visits and spend, in turn supporting employment and growing income across the region.

Innovation and resilience

84. **Remaining globally competitive requires an innovative tourism industry making full use of digital technology and data to enhance the visitor experience.** Better data ultimately means better targeted, more economically efficient decisions by both public and private actors in the industry. Many of the UK's tourism attractions utilised digital technology to connect with people in their homes during lockdown, and continued innovation in this area can mean a more sustainable and attractive visitor offer. As COVID-19 restrictions lift, the pent-up demand for physical experiences will return, but tourism businesses can benefit from continued diversification of their operating models. To embed resilience in this area, the workforce must be given the skills to embrace digital marketing and engage new audiences in a sustained way in the years to come.

Digital Innovation and Connectivity

85. **Businesses across the sector have embraced the opportunities provided by digital innovation during the pandemic.** Blue Badge tour guides are providing virtual online tours of local areas; attractions such as the Tower of London, Buckingham Palace and the British Museum are providing virtual experiences; the National Trust has given virtual tours of its houses and gardens; and cultural performances at the National Theatre, Shakespeare's Globe and the Royal Opera House have been accessible to consumers from the comfort of their own homes. By pivoting towards online experiences during lockdown, the UK's attractions connected people with arts, heritage and culture at a time when they needed it most. Digital innovation will not replace the tourist experience in the longer term, and connecting audiences with culture digitally will never match the experience of visiting a real destination. However, the pandemic has shown the tourism sector as an innovative adopter of digital technology that can continue to be used to enhance the visitor experience through new ways of storytelling.

86. **More widely, government investment in digital connectivity has harnessed the power of new technologies, such as full fibre and 5G, to drive innovation in the visitor economy.** For example, the 5G Smart Tourism project, funded by the Department for Digital, Culture, Media and Sport in partnership with the West of England Combined Authority, saw the Roman Baths offering visitors Virtual Reality and Augmented Reality time-travel experiences on their own handsets,[86] while the 5G Connected Forest project in Nottinghamshire's Sherwood Forest will provide visitors with accessibility issues with new semi-autonomous transport around the forest.[87] In January 2021 the government announced that it is investing £28 million to trial innovative new uses of 5G to improve people's lives. The joint investment from government and businesses will fund UK-wide projects that will seize the benefits of 5G and help British industries, including the tourism sector. These include the Eden Universe at the Eden Project in Cornwall, which will explore how 5G and 360-degree video can enhance the visitor experience and allow audiences worldwide to enjoy exhibits and talks. On the Isle of Wight, the Connected Cowes project will use 5G to create an immersive yacht-racing experience at the 2021 Cowes week. Meanwhile, the Milton Keynes 5G project is testing 5G at the MK Stadium to see how it can improve efficiency and create better visitor experiences, including through driverless vehicles.[88]

[86] https://www.gov.uk/government/case-studies/5g-smart-tourism
[87] https://www.nottinghamshire.gov.uk/newsroom/news/with-video-sherwood-forest-on-target-to-become-the-world-s-first-5g-connected-forest
[88] https://www.gov.uk/government/news/28-million-to-trial-innovative-new-uses-of-5g-to-improve-peoples-lives

87. **The UK government has also provided funding to the British Tourist Authority (BTA) to upgrade and transform its operations.** The way people book holidays is changing, with a transition to online that COVID-19 has accelerated. To market effectively, the BTA needs a stronger digital presence. They will invest to upgrade their consumer-facing platforms, to ensure a consistent brand narrative across their digital assets and to optimise marketing campaigns for modern devices and browsers. The government will also invest in the BTA's back-office systems, to drive value for money, efficiency and compliance.

Data and Innovation

88. **The potential gains from collating and maximising existing data could be substantial.** COVID-19 exposed gaps in the tourism data sets held by the UK government; for example whilst data has been used to produce broad estimates of tourism volume and overall spend, it has been less easy to translate that into estimates of profitability in the sector and business resilience. Throughout the pandemic the sector has been forthcoming with data requests from the government, and these have helped to implement the right policy responses at the right time, but this is not sustainable for the sector and the data needs to be more robust and representative of the entire country, including rural areas which can often face connectivity challenges. Technology and digital connectivity are rapidly changing the way people travel and how audiences interact with the world around them. It is estimated that 85% of inbound[89] visitors to the UK book their travel online and 56% use location technology to find attractions whilst on holiday.[90] The government sees this change in booking holidays as an opportunity to understand visitor's motivations and habits in a new and innovative way.

89. **Given the importance of data, the government will continue to actively explore, with VisitBritain, the benefits of developing a Tourism Data Hub.** A Hub could address long-standing issues with access to robust, accessible and timely data in the tourism sector. Public/private sector engagement to collate, combine, analyse and disseminate the vast amount of data on consumer behaviour currently held by businesses in the industry could form the basis of a Tourism Data Hub. The Hub could track consumer trends in travel, such as the growth in "active tourism" and booking of sustainable tourism experiences. It could ideally cover data that represents all aspects of a visitor's travel experience, including searching and booking (data held by booking engines and travel agents), travel, accommodation, spending, movement (data held by telecoms companies) and evaluation (review sites).

90. **The government will also launch a consultation on the introduction of a Tourist Accommodation Registration Scheme in England.** A Registration Scheme is one potential route through which to create a data-driven approach, creating an improved national picture of the precise shape of the accommodation landscape which could feed into a wider Data Hub. Any such scheme could encompass the breadth of the sector, from 'traditional' accommodation such as hotels and B&Bs to short term lets in the sharing economy and could be used to underpin future government interventions, for example regarding the regulation of the sharing economy. The rise of the sharing economy has and will continue to play an important role in attracting tourists to destinations across the country and contributing to the UK economy. However, it has created concerns about uneven regulatory requirements and negative impacts on local communities compared to other types of accommodation. The government is committed to hearing the views of all interested parties on the merits and drawbacks of a Registration Scheme, and how any potential scheme could be implemented proportionately to avoid placing a significant regulatory burden on the sector or risking a reduction in supply.

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[89] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_151_-_booking_a_holiday_v2.pdf

[90] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_152_-_tech_and_social_media_v2.pdf

Digital Innovation at the Border

91. **Innovation will also be needed at the border. The 2025 UK Border Strategy will deliver a world class border that will make travellers' journeys smoother and more secure.** As part of this modernisation of the border the government has announced that the UK will introduce an Electronic Travel Authorisations (ETAs) scheme for visitors and passengers transiting through the UK who do not currently need a visa for short stays, or who do not already have an immigration status prior to travelling. ETAs will be price competitive and customer friendly (quick and light touch). Quantitative data on ETA applications and approvals will be published regularly on gov.uk. The Home Office will work with VisitBritain to explore how this data can support tourism policy and promotion. The Home Office will work with VisitBritain to explore how information to plan their visit can be shared with applicants when they receive confirmation of their ETA, and scope the potential for VisitBritain to work with UK Visa and Immigration commercial partners to better exploit their commercial platforms including online digital comms channels and physical Visa Application Centres to promote the UK.

92. **Border Force remains committed to continuing to deliver a service that protects the public and seeks to facilitate and continually improve the border crossing experience for legitimate trade and travel.** The UK will continue to explore options around increasing digitisation and automation at the border that will speed up and improve passenger journeys through UK ports. The UK port industry has already invested significantly in automation and digitisation of processes. The government is determined to support ports to trial new approaches and take advantage of new technologies to improve passenger journeys.

93. **Digital transformation within visa services also allows the UK to remain agile to the needs of customers,** both within and beyond the tourism sector. Digitisation and improvements to the customer journey continue to be a key part of the borders, immigration and citizenship system strategies within the Home Office. Across all sectors, UK Visas and Immigration's ambition remains to provide a world-class immigration service; increasing digital capability to deliver improvements to customer experience within the visa service.

Skills

94. To build back a resilient, future-proof tourism sector, further efforts will be needed to ensure the industry is employing more UK nationals in year-round, quality jobs and that this workforce is adequately and appropriately skilled.

95. **The Tourism Sector Deal included a range of commitments from government and industry to develop the workforce and its pipeline.** The landscape of the sector has shifted dramatically since then, and in response the government commits to working with industry to identify the jobs that will be needed in the sector of the future, to increase apprenticeships, to boost skills, and to help to make the tourism sector an appealing career prospect for young people to train in and adults to retrain in. Extending the tourism season, via investments such as those set out earlier in the Plan, will help with year round jobs, but targeted skills action is also needed.

Box 10: Industry engagement on skills

To deliver the UK government's Tourism Recovery Plan, the UK will need a committed, talented and diverse workforce that sees tourism and hospitality as sectors that offer good, well paid, year round jobs, as well as careers.

The industry remains committed to an employer-led, coordinated and proactive approach towards recruitment, retention and upskilling of the workforce, and ensuring there is a pathway

to a rewarding career for the millions of people already working in the sector or looking to join the industry.

Coordinated by UK Hospitality and the British Beer and Pub Association (both of whom sit on the Tourism Industry Council), with the support of People 1st and Springboard, and working with a wide range of other organisations and employers, there are currently four industry led strategic priorities. These are i) great jobs and careers, ii) tackling long term unemployment, iii) vocational training and professional standards and iv) diversity and inclusion.

Led by employers at a senior level via the Hospitality and Tourism Skills Board set up following the Tourism Sector Deal, the industry will develop programmes with ambitious targets to deliver on these priorities, including in areas such as apprenticeship starts, retention metrics, training goals and mentoring initiatives. The government will work closely with the Hospitality and Tourism Skills Board as this work progresses.

96. **There is already a significant amount of activity being undertaken by the government on skills which benefits the tourism industry.** For example:

- **In December 2019, the government announced the National Skills Fund, a £2.5 billion investment in helping adults to gain the skills they need to improve their job prospects and support the economy.** As part of this, the Prime Minister announced in September 2020 the Lifetime Skills Guarantee, which includes a new offer for adults aged 24 and over to access around 400 fully funded courses as well as free complementary skills bootcamps. Whilst there are no courses specifically dedicated to travel and tourism, a great many of the courses on offer are the building blocks of skills development in any industry – business management, ICT skills, digital marketing, and finance. The government will keep this list of qualifications under review and the government will be undertaking a consultation on the National Skills Fund later this year.
- **The government has announced schemes to support growth in apprenticeships and traineeships.** This includes a £1,000 cash boost to help employers in England, including in tourism and hospitality, to provide work placements for young people aged 16-24 starting a new traineeship. This scheme is available until 31 July 2022, and will support young people to gain skills and experience, and help them to find a job, a future apprenticeship, or to pursue further study. The government is also providing a £3,000 payment to employers in England for each new apprentice hired between 1 April 2021 and 30 September 2021, which could provide a significant boost for tourism and hospitality businesses who capitalise on the offer as they reopen for business.
- **The Institute for Apprenticeships & Technical Education, a government arms-length body, equips people from all backgrounds for skilled occupations.** By working with employers to design apprenticeships and technical qualifications such as T Levels the Institute helps deliver jobs and opportunities within the tourism sector, for instance in the world of hospitality, museum curation or culture heritage conservation. The Institute is currently revising a suite of catering and aviation apprenticeships to ensure apprentices are ready to adapt and play their part in the recovery from Covid-19.
- **The Great Britain-wide Kickstart Scheme provides funding to employers in order to create hundreds of thousands of new job opportunities for 16 to 24 year olds on Universal Credit.** This scheme is available to employers of all sizes. The government is encouraging employers right across the country to create high quality Kickstart jobs, including employability support which will invest in the next generation of talent. Funding includes 100% of the age-relevant National Minimum Wage or National Living Wage for 25 hours per week for a total of 6 months and the relevant National insurance and pension contributions.

- **In June 2020, the Department for Digital, Culture, Media and Sport supported the creation of the Digital Boost platform,** providing free advice and support for small businesses across all sectors to build their digital capability to effectively respond to the challenges created by COVID-19.
- **Throughout the pandemic, VisitEngland has run webinars in conjunction with Google Digital Garage** to provide tourism businesses with practical tips as they begin to recover. These webinars continue to run.[91]
- **At the 2021 Budget, the government announced two new schemes – Help to Grow: Management, and Help to Grow: Digital.** The government will offer a new UK-wide management programme to upskill 30,000 small and medium size enterprises in the UK over three years. Developed in partnership with industry, the programme will combine a national curriculum delivered through business schools with practical case studies and mentoring from experienced business professionals. Over 12 weeks, and 90% subsidised by the government, this programme will equip businesses with the tools to grow and thrive. Help to Grow: Digital will be a new UK-wide scheme launched in the autumn of 2021 to help 100,000 small and medium sized enterprises save time and money by adopting productivity-enhancing software, transforming the way they do business. This will combine a voucher covering up to half of the costs of approved software up to a maximum of £5,000, and free impartial advice, delivered through an online platform.

97. **The 2021 update to the International Education Strategy will promote the UK's English Language Training which isan important part of the visitor economy.** There were 35,700 UK jobs supported by English Language Training in 2018, and this industry provided £1.4 billion GVA to the UK economy. Beyond this functional contribution, the continuing desirability of English language skills drives the UK's soft power on the world stage.

98. **The UK government recognises that labour mobility is an important issue for many sectors, including the tourism sector.** The UK government already has a Youth Mobility Scheme visa (T5) which people can apply for if they're aged 18 to 30 and from the following countries: Australia; Canada; Hong Kong; Japan; Monaco; New Zealand; Republic of Korea; San Marino; and Taiwan. The government is open to confirming further Youth Mobility Scheme arrangements not limited to just those within the EU Member States. The YMS is primarily designed as a framework to encourage cultural exchange, which also allows participants to both work and study. The government will continue to work closely with a range of stakeholders in the coming months to understand their priorities and the range of options which are available.

Sustainability

99. **Protecting and enhancing the environment is at the heart of this government's agenda.** The government has already made significant commitments such as Net Zero 2050,[92] and within the 25 Year Environment Plan, which will help improve air quality, create richer habitats for wildlife, connect more people with nature and reduce plastic use. But the world has also seen the impact of unmanaged tourism in places where numbers increase exponentially in cities such as Venice or Dubrovnik. Tourism businesses need to work with local populations to protect the amenity for visitors and residents alike. Building back better from COVID-19, the government wants the tourism industry to play its part in the overall sustainability agenda. That means pursuing a tourism industry that contributes to the enhancement and conservation of cultural, natural and historic heritage and minimises damage to the environment.

[91] https://www.visitbritain.org/business-advice/business-recovery-webinars

[92] A legal requirement to reduce the UK's greenhouse gas emissions to net zero by 2050: https://www.gov.uk/government/news/uk-becomes-first-major-economy-to-pass-net-zero-emissions-law

100. **The government will continue to invest in the nation's natural assets and historic environment, which serve as a major driver for tourists, both domestic and international.** The 2020 Spending Review committed £7 million to complete the England Coast Path and Coast-to-Coast National Trail. Once complete, the England Coast Path will be the longest managed and way-marked coastal path in the world.[93] The government has also committed to introducing more National Parks and other designated landscapes, to increase access to nature and protect our landscapes for visitors to come. According to VisitBritain international COVID-19 sentiment research, outdoor nature activities are the third most popular activity that potential visitors would be interested in doing during their next international trip.[94]

101. **Recognising the importance of sustainable tourism, the government commissioned the recent Landscapes Review, led by Julian Glover.** The Review recommended that National Parks and Areas of Outstanding National Beauty (AONB) should become leaders in sustainable tourism, by working together with Destination Management Organisations, local authorities, Local Enterprise Partnerships, and local businesses. Since the review was published, the nation's Protected Landscapes have seen a significant increase in overall visitor numbers, as the public sought to enjoy the natural environment during these challenging times. The government is working with partner organisations to consider all aspects of the review carefully, including how to support the recovery plans, and hopes to consult on this later this year.

102. **At Spending Review 2020, the government announced an investment of £950 million to provide a network of electric vehicle charging hubs at every service station on England's motorways and major A-roads.** The investment will allow drivers of electric vehicles to charge them on long journeys quickly and easily, addressing consumer anxieties around using electric vehicles for travelling long distances and making it even easier to use this sustainable transport option for domestic trips. In addition, the government has launched a consultation on improving the charging experience. The electric vehicle charging schemes are to be opened to small business, leaseholders and those in rented accommodation to accelerate electric vehicle uptake, and the Workplace Charging Scheme will be changed to help small accommodation businesses (such as B&Bs) and the charity sector (heritage sites and other charitable destinations) install electric vehicle charge points for guests and visitors. Worth up to £50 million, the updated schemes will ensure charge points are easily available in rural areas.

103. **The super-deduction announced at the 2021 Budget** will allow companies to claim 130% capital allowances on qualifying investments such as electric vehicle charge points and solar panels.[95]

104. **The government is developing a bold and ambitious Transport Decarbonisation Plan to achieve net zero emissions across all modes of transport.** In March 2020, the government published "Decarbonising Transport: Setting the Challenge", a comprehensive publication that set out the challenge of decarbonising transport. Since then, the government has engaged with a broad range of stakeholders and the public in developing the Transport Decarbonisation Plan. The holistic and cross-modal approach to decarbonising the entire transport system will set out a credible and ambitious pathway to deliver transport's contribution to carbon budgets and meet net zero by 2050.

105. **The government has established the 'Jet Zero Council',**[96] which brings together government and industry to drive forward the government's decarbonisation ambitions for the aviation and aerospace sectors, with the aim of achieving zero-emission flight within a generation. It will help ensure delivery of the government's Net Zero commitment whilst supporting tourism to thrive as demand for travel continues to grow. The government will consult on its Net Zero Aviation Strategy later this year.

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[93] See here for an overview of progress: https://www.gov.uk/government/publications/england-coast-path-overview-of-progress

[94] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/international_covid-19_sentiment_research_-_wave_1_2021.pdf

[95] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/967202/Super_deduction_factsheet.pdf

106. **Internationally, the government will use multilateral fora such as the G20 and events such as the UN's 26th Climate Change Conference of Parties (COP26) to identify opportunities and secure commitments to embedding sustainability into the recovery of the global tourism industry.** The government will work with the business events sector on our ambition to be a leader in hosting sustainable business events by 2030.

107. **The government will develop a Sustainable Tourism Plan, and put the UK at the forefront of the global discussion on sustainable travel.** Domestically, the government will work with industry and the British Tourist Authority to identify achievable ways for the sector to 'grow back greener', in ways that will reduce the travel industry's impact on the natural and built environment, respect local host communities and take their needs into account, and maximise the economic benefits for tourism businesses and their local communities in all regions of the UK. VisitBritain/VisitEngland are working with the tourism sector to celebrate and amplify best practice, and to coordinate an industry response that promotes the UK as a leader in sustainable tourism and puts the UK's natural landscapes and communities at the heart of the country's brand proposition.

Box 11: The Heritage Sector

The heritage sector is an important part of Britain's tourism offer, and protecting and conserving natural and built heritage is a priority.

Analysis commissioned by Historic England shows 57% of the total spending in the UK made during heritage-related visits is from inbound visitors.[97] Heritage is not just important to the economy; it delivers social benefits as sites can act as 'anchor institutions' in local areas – both rural and urban – playing an integral social role to the community, and supporting individual and collective wellbeing.[98]

Historic sites have been hit hard by the pandemic – the gross value added of the historic sites sub-sector shrank by 32% in real terms for March to December 2020 compared to the same period in 2019. By comparison, the UK economy as a whole shrank by 11%.[99]

The sector has received significant financial support throughout the pandemic, for example, £113 million in revenue funding was distributed to 984 organisations in Rounds 1 and 2 of the Culture Recovery Fund (CRF) over 2020-21. A further £67 million in capital funding was distributed through the Heritage Stimulus Fund and NLHF Kickstart fund, supporting hundreds of maintenance and restoration projects, many of which had been delayed by the pandemic. These projects have also continued or established pipelines of work to employ large numbers of skilled workers in the construction and conservation industries. The Heritage Stimulus Fund is estimated to have safeguarded around 1000 jobs and should boost economic impact by between £64 million and £102 million each year.

There were also smaller funds made available for improvements to business infrastructure and digital frameworks. £1 million of CRF funding also scaled up the National Lottery Heritage Fund's 'Digital Skills for Heritage' initiative, creating a £2.5 million fund for 2020/21. This initiative provides training and support for small-medium heritage organisations looking to develop digital skills.

[96] https://www.gov.uk/government/groups/jet-zero-council
[97] https://historicengland.org.uk/content/heritage-counts/pub/2020/heritage-and-the-economy-2020/
[98] For example, see https://www.houseofgood.nationalchurchestrust.org/; https://whatworkswellbeing.org/wp-content/uploads/2020/01/Heritage-scoping-review-March-2019-1.pdf
[99] https://www.gov.uk/government/statistical-data-sets/ad-hoc-statistical-analysis-202021-quarter-4

Future investment will continue to ensure that tourism can contribute to the enhancement and conservation of the nation's cultural, natural and historic heritage. For example, Culture and Heritage is an important element of the £4.8 billion Levelling Up Fund and the Community Ownership Fund will contribute £150 million to community groups to buy or take over local community assets that are at risk of being lost.

Inclusivity

108. **The Tourism Sector Deal set out an ambition for the UK to become the most accessible tourism destination in Europe by 2025.** The UK government remains committed to this target. An inclusive and accessible tourism offer that meets customer needs is good for both businesses and consumers. Before COVID-19, half a million British adults cited 'lack of accessibility provision' as the reason they did not take a domestic trip in the previous 12 months. More generally the government is committed to improving the lives of disabled people, and will publish the National Strategy for Disabled People this year. The strategy will take into account the impacts of the pandemic on disabled people and will focus on the issues that disabled people say affect them the most in all aspects and phases of life.

109. **Activity is already underway to enhance the accessibility of the UK's tourism offer.** For example:

- In July 2018, the government published the Inclusive Transport Strategy with over 90 commitments. This government retains the ambition that disabled people must have the same access to transport as everyone else, and be able to travel confidently, easily and without extra cost. A lot of progress has been made in delivering the strategy, and progress reports were published in 2019 and 2020.[100]
- In March 2021, the government announced that unitary and district local authorities will be invited to opt-in to its £30 million Changing Places Fund to increase the provision of Changing Places toilets in public buildings. New building regulations guidance came into force in January 2021 to make Changing Places a requirement in all new public buildings, including zoos and theme parks with a capacity of over 2000 people, hotels and museums.

110. **VisitBritain and VisitEngland continually strive to adapt their business to ensure it is as inclusive as possible.** For example:

- VisitBritain and VisitEngland recently partnered with Channel 4 to create the Mission: Accessible series as part of the Escape the Everyday campaign.[101]
- VisitEngland provides direction and support to businesses and destinations on harnessing the valuable and growing accessible tourism market with a dedicated section of guidance and resources on their Business Advice Hub.[102]
- VisitEngland also convenes England's Inclusive Tourism Action Group, comprising a range of leading accessible tourism stakeholders, and runs a National Accessible Scheme which rates tourist accommodation based on their suitability for guests with accessibility requirements.[103]
- VisitBritain runs the Love is GREAT site which provides advice and itineraries to LGBTQ+ travellers.

[100] See here for a summary of progress: https://www.gov.uk/government/publications/inclusive-transport-strategy/the-inclusive-transport-strategy-summary-of-progress
[101] https://www.channel4.com/programmes/mission-accessible
[102] www.visitengland.org/access
[103] https://www.visitbritain.org/business-advice/englands-inclusive-tourism-action-group



111. **However, the government believes that more needs to be done to understand the barriers holding back participation in tourism.** Without a detailed understanding of the baseline position, it is not possible to establish the most appropriate government interventions. As such:

- **The Minister for Tourism will hold a series of roundtables with stakeholders from across the tourism industry to better understand the barriers holding back participation in tourism.** These roundtables will be themed around issues such as guest accommodation, transportation, attractions, working with customers and skills. The aim is to establish a clear baseline of where the UK is in terms of inclusive tourism, and to come up with a series of concrete actions that the government can pursue to make a meaningful difference, above and beyond existing activity.
- **Later this year, the government's intention is to recruit a new disability and access ambassador for tourism.** The selected individual will promote best practice, help identify ongoing barriers and contribute to strategic thinking around how to improve accessibility in the sector.

Supporting business events

112. **COVID-19 has caused significant disruption to the business events industry.** Disruption came early on, with cancellations of shows as early as January 2020. Between March and December of 2020, no live business events were able to take place above 30 people. Whilst some activity did take place, it was very limited. An estimated 17.5% of event and exhibition businesses are estimated to have permanently ceased trading during 2020 and there were estimated to have been 126,000 job losses by the end of August.[104] During the pandemic, the business events industry has made extensive use of the UK government's pan-economic support package. For example, 94% of venues are estimated to have used the Coronavirus Job Retention Scheme, and 40% of firms across the industry still had between 75% and 100% of staff on furlough in September 2020.[105]

113. **For the tourism sector as a whole to recover, and in order to deliver our overall framework for the sector, the business events sub-sector has to be firing on all cylinders**. Currently, the UK is placed number 5 in ICCA's country rankings for business events, just behind the US, Germany, France and Spain at numbers 1 to 4 respectively.[106]

114. **The government wants to improve the attractiveness of the UK's already strong offer and become the World's Meeting Place, continuing to host set piece global events such as the annual World Travel Market which will next take place in London in November 2021.** Events can play a major role in asserting Britain's international trading strength, highlighting components of its industrial strategy, its creativity and its commercial inventiveness, and bringing the country together to present its intrinsic values. As well as the economic impacts of both business and leisure events, there is now much wider recognition of the many other benefits to accrue from hosting and staging conferences and other business events: research sharing, knowledge transfer, professional development, networking and relationship building, and the attraction of inward investment opportunities are among such benefits.

115. **Before COVID-19, the government was making good progress on delivering the UK government's International Business Events Action Plan**, working closely with the Events Industry Board, which advises the government on business events policy. For example, in 2019-2020, VisitBritain's Business Events Growth Programme achieved an estimated return on investment of 27:1 on the grants it issued to grow international business events held in the UK.[107] Event bidders were making use of Ministerial advocacy to enhance their bids, and VisitBritain were ensuring the UK had a strong, internationally competitive offer in all 4 nations.

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[104] Internal DCMS estimates
[105] DCMS Coronavirus Survey
[106] ICCA is the International Congress and Convention Association, the global association leader for the international meetings industry. ICCA's produces country and city rankings annually, based on the number of meetings held that address the following criteria: rotating between at least three countries, have a proven attendance of at least 50 participants, and are held on a regular basis. Based on the latest available data from 2019, the USA occupies the top spot.
[107] VisitBritain

Box 12: Business Events Case Study

Helping destinations successfully bid for international conferences, events and trade fairs gives a platform for British businesses, products and destinations – showcasing Britain as a global knowledge hub, a world leader in innovation and academic excellence, and delivering the government's vision for the UK to be a Science and Technology Superpower.

Euroanaesthesia 2023

VisitBritain's Business Events Growth Programme supported Glasgow's successful bid to host Euroanaesthesia 2023. This annual event brings together some 6000+ international delegates who will spend in excess of an estimated £6 million. Funding support enabled the Glasgow bidding team to attend the ESA Board Meeting in Brussels on 2 December 2019, to present Glasgow's bid to be host city for the annual congress in 2023. This included an oral presentation to the ESA Board and showcasing a bespoke video of Glasgow, followed by a detailed Q&A session. As a result Glasgow received 9 out of the 10 ESA Board votes in favour of the congress being held in Glasgow in 2023.

Sibos 2019

In 2019 London successfully hosted the largest Sibos event (the world's largest international financial/technology services exhibition) in its 41 year history. The Business Events Growth Programme supported the growth of this event through multiple activities which increased international delegate attendance in London, specifically key decision makers within the Financial and Technology sectors. The event created a platform for business and promotional activities to champion the importance of the UK's FINTECH, Finance and Business, and Leisure Tourism sectors. The London event attracted 11,500 people – an uplift of 3,700 delegates on Sibos 2018 in Sydney – and delegate spend alone was almost £12 million.

More widely, seven future events have been won by the UK as a result of Business Events Growth Programme activity during 2020-21 – and five of these bids were supported by government advocacy. Estimated delegate spend for these events is estimated to be almost £54 million.

World Travel Market 2019

World Travel Market is the world's largest annual international travel trade show, and has been hosted in London for 40 years. In 2019 it welcomed more than 30,000 delegates and generated around £4 billion in travel and tourism industry deals. An estimated £165 billion of trade is transacted at trade shows and exhibitions annually in the UK: retaining flagship events like World Travel Market will maximise the contribution of business events to the UK economy and support the government's ambition to become the World's Meeting Place.

116. **In its 6th year, VisitBritain's Business Events Growth Programme aims to attract international business events to the UK, and to grow the international profile of business events regularly held here through increased attendance and campaign activity.** The objectives of the programme this year are to boost the UK's winning potential, showcasing that the UK is ready to meet again, as well as to encourage greater international trade and investment potential for the UK, and to increase economic benefits through additional international visitor spend – while adapting to new ways of meeting in a COVID-19 secure environment. Government advocacy support and financial support will both be available to add value and strengthen the UK business events industry. The government will consider the case for expanding the Programme, to allow for more workshops, bigger and better marketing campaigns, greater presence at international trade shows, larger grants to event organisers and the potential for seed-funding the creation of new events with great potential.

117. **This year, VisitBritain has established from within their budget allocation a UK-wide domestic fund for business events.** This new fund will provide financial support to kick start the return of business events attended by largely domestic audiences. The value of the fund is £100,000 in the financial year 2021-22 and it will be open for applications until 30 November 2021.

118. **The government is continuing to invest in events infrastructure.** For example, earlier this year, the government ran the latest Department for Digital, Culture, Media and Sport UK-wide competition to improve broadband connectivity in event venues. Subject to an ongoing assurance process, the successful venues will receive a share of £200,000 to install full fibre access. This improved digital infrastructure will enable event venues to produce stronger bids to secure future international business events. Furthermore, a new first class, all-weather events venue will be developed in Southport, a beneficiary of £37.5 million from the government's Towns Fund. Plymouth City Council has also received £12 million in funding from the government's Future High Streets Fund to create a new conference centre and linked events venue at the Civic Centre and Guildhall in Plymouth city centre.

119. **The UK government will also enhance its Ministerial advocacy programme.** The Events Industry Board notes that advocacy is critical to winning international business events. As such, UK government Ministers will commit to delivering keynote speeches on a regular basis at international business events held in the UK. The government will also work with GREAT and VisitBritain to designate sector-specific UK-wide events ambassadors, who will promote the UK as a location for, and advocate for, events in key industries and sectors. These ambassadors will be pre-eminent and high profile in their field, helping the UK win, grow or retain events that showcase the UK on a global stage and drive growth in strategically important industries. To drive forward these commitments, the government has created a cross-Whitehall group of senior officials in key government departments with an interest in growth and business events.This group will be tasked with developing a target list of international business events for the government to focus on bringing to – and retaining in – the UK, and developing a plan to host them here.

120. **COVID-19 may alter the way in which business events are conducted.** Though trends are ultimately difficult to predict, there may be long lasting effects from the pandemic, such as a greater number of online only, or 'hybrid' events combining in-person meetings with virtual gatherings. The UK government wants to ensure our business events sector is fit for the future. As such the government will work with the industry to:

- **Produce a strategy for sustainable business events, including a blueprint for how to hold more sustainable, low carbon international business events.** With the UK hosting COP26 later this year, now is the ideal time for the business events industry to demonstrate its commitment to sustainability and reducing carbon emissions. The government will also work with the sector to encourage delivery of fringe events around COP26 where UK industry will showcase its ambition to be one of the world's most sustainable locations for hosting business events.
- **Assess gaps in business events venue provision, both in terms of regional 'cold spots' and whether the UK has the right variety of venues to support its international competitiveness in hosting 21st century business events.** More widely, the government will also work with the Events Industry Board to consider how the competitiveness of existing venues can be increased, as well as identify and implement improvements to venue accessibility. As part of this work, the government will also explore opportunities to advocate for increased accessibility in associated infrastructure in other areas, such as transport and hospitality.
- **Identify the skills and capacity gaps that have emerged as a result of both the pandemic's impact on the workforce, and of structural changes to the industry.** The government will also work with industry leaders to understand emergent opportunities, such as encouraging diverse young people to enter a career in the events industry.

121. **The government will work closely with industry to deliver this Plan.** Since 2015, the industry-led Events Industry Board has supported the government in delivering its international business events policies and acts as a point of dialogue between the industry and Ministers. The challenges of COVID-19 have also necessitated more frequent and flexible modes of engagement with the sector, however, which will continue as this Plan's proposals are implemented and, at the same time, ensure the sector is reopened in a safe and sustainable way. To achieve this, government will work with the newly constituted Business Events Recovery Working Group, as well as other key industry leaders, in order to continue to get the right advice at the right time.

Chapter 4: Next Steps

122. **The UK government is committed to ensuring that the UK's tourism economy recovers swiftly from COVID-19 and emerges from the crisis in a position of strength.** The Department for Digital, Culture, Media and Sport will continue to work with departments across government to assess the future financial needs of the sector. This Tourism Recovery Plan contains a series of commitments that sets out the path for delivering the overall ambition of a growing, dynamic, sustainable and world-leading tourism sector reaching its full potential and driving growth in every nation and region of the UK.

123. **The government will revisit the Tourism Recovery Plan at regular intervals to ensure the right policy interventions are in place.** The government will work collaboratively with the Tourism Industry Council, Events Industry Board, the British Tourist Authority and the devolved administrations and other key stakeholders from across the tourism sector in order to get it done.

124. **The government has revised the Framework Agreement between the British Tourist Authority and the Department for Digital, Culture, Media and Sport for 2021-22,** in order to set out the role of VisitEngland and VisitBritain in delivering this Tourism Recovery Plan over the next year. This reorients their business to be fully focused on delivering the government's vision for the sector.

125. **Parliament will have a role to play in helping to deliver the plan, and the government will provide the Digital, Culture, Media and Sport Select Committee with an annual update on the progress of the plan** and the tourism industry more generally as it recovers, with the first update in 2022.

126. **Finally, a plan of this scale needs clear internal oversight.** A new inter-Ministerial group for Tourism, chaired by the Secretary of State for Digital, Culture, Media and Sport and supported by the Minister for Tourism, will be set up to deliver this plan and agree the government's future interventions against it. The group will meet four times a year and will ensure the plan is delivered. Two new cross-government working groups of lead officials will also be set up underneath this, meeting more regularly and ensuring rapid, effective progress – one to lead on business events, and the other on the tourism sector more broadly.



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