



Department  
for Culture,  
Media & Sport

# **Tourism Recovery Plan Update on Delivery**

March 2023

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# Section 1 - Overview

## Introduction

In June 2021, the UK government published the Tourism Recovery Plan<sup>1</sup> in response to the significant impact that the COVID-19 pandemic had wrought on the sector. The Tourism Recovery Plan (hereby referred to as 'the Plan') outlined the following six objectives:

For the short to medium term, to:

1. 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.

And for the medium to long term, to:

2. 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;
3. build back better with a more productive, 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;
4. ensure the tourism industry contributes to the enhancement and conservation of the country's cultural, natural and historic heritage and minimises damage to the environment;
5. ensure the tourism industry provides an inclusive offer that is open to all, aiming for the UK to become the most accessible tourism destination in Europe by 2025; and
6. make the UK a leading European nation for hosting business events.

This update sets out the progress made against the Plan's six objectives, highlights ongoing work, and sets out the future actions the government will take to continue supporting the sector as it not only recovers from the COVID-19 pandemic but also faces the economic challenges that have arisen since the publication of the Plan in 2021.

The Plan remains the government's strategic framework for supporting and working with the tourism sector. Whilst good progress has been made against all objectives, the majority of the Plan's ambitions are for the medium and long term, focused on building a more resilient, productive, sustainable, accessible and innovative sector for the future. The Plan will continue to be reviewed and updated, including on the basis of evolving research and data collection, to ensure it remains an effective framework. The government will continue to work with VisitBritain, local government, Destination Management Organisations (DMOs),<sup>2</sup> the Tourism

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<sup>1</sup> DCMS (2021), [Tourism Recovery Plan](#)

<sup>2</sup> To be renamed Local Visitor Economy Partnerships as per the recommendation of the Nick de Bois Review of DMOs 2021.

Industry Council and other key stakeholders to keep the Plan under review, and to take further action where needed.

## The State of the Tourism Sector

**Tourism is a significant economic, cultural and social asset to the UK. The sector is a powerful engine for economic growth and job creation throughout every nation and region.** Before the pandemic, in 2019, tourism contributed nearly £74 billion to the UK economy - 4% of the UK's total Gross Value Added (GVA).<sup>3</sup> The sector directly supported 1.7 million jobs,<sup>4</sup> employed a higher than average proportion of women and young people,<sup>5</sup> and supported over 230,000 Small and Medium-sized Enterprises.<sup>6</sup> Britain is perceived as a place where history and heritage meet modernity and vibrancy,<sup>7</sup> and the country's tourism offer is iconic - from historic buildings and incredible landscapes to culturally vibrant cities and world-leading hospitality, with many of the world's best bars and fine dining restaurants located in the UK.<sup>8</sup> <sup>9</sup> Tourism contributes not only economically, but also in creating pride in local communities, and in building the UK's global reputation, showcasing the best of the UK to the world and contributing to the UK's soft power.

**COVID-19 was hugely disruptive for the sector. The tourism-direct GVA for 2020 was £27bn - a loss of 64% compared to its GVA contribution in 2019.**<sup>10</sup> Over the course of the pandemic, international tourism ceased as the UK put in place necessary health-related travel restrictions for inbound travellers, until the full removal of those measures in March 2022. Domestic tourism was also heavily impacted over lockdowns between 2020 and 2021, with businesses closed, visitor events called off and travel around the country restricted.

**The Plan was published in summer 2021 in recognition of the impact of COVID-19 and the value of the sector to the UK economy.** The UK government's ambition was, and remains, to build on the country's position as one of the most desirable tourist destinations in the world and to enhance the UK's offer by: effectively marketing the country's tourism assets; attracting domestic and international visitors; and supporting a growing, dynamic, and resilient sector reaching its full potential, creating jobs and driving growth in every nation and region of the UK. The Plan was a first step towards recovery. Since its publication, the focus has been on getting the tourism sector fully and safely reopened post-COVID, supporting businesses to survive the economic fallout of the pandemic, and stimulating demand for a return to tourist activities. The Plan acknowledged that delivery of its objectives would not be

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<sup>3</sup> Office for National Statistics (2021), [Tourism Satellite Account 2019](#).

<sup>4</sup> Office for National Statistics (2021), [Tourism Satellite Account 2019](#).

<sup>5</sup> Economic Insight (2019), [Hospitality and Tourism workforce landscape](#)

<sup>6</sup> DCMS calculation multiplying number of businesses from Office for National Statistics (2021), [Tourism Satellite Account 2019](#) by % of SMES in those sectors, using ONS's [Activity, size and location](#) for 2019.

<sup>7</sup> VisitBritain (2022), [MIDAS: A Global Report. Motivations, Influences, Decisions and Sustainability in a Post-Pandemic Era](#)

<sup>8</sup> World's 50 best: Bars (2022). [The World's 50 Best Bars - The List and Awards](#)

<sup>9</sup> [Michelin Guide 2022](#)

<sup>10</sup> Office for National Statistics (2023), [Tourism Satellite Account 2020](#).

achieved overnight and would take time, cross-government coordination and extensive collaboration with the tourism sector.

**At the beginning of 2023, the picture of recovery is a mixed one.** Significant government support measures, both pan-economy (such as the furlough scheme) and sector-specific (such as the Culture Recovery Fund) helped businesses to survive the acute economic shock caused by the pandemic. For example, the reduced rate of VAT for tourism and hospitality helped support the cash flow and viability of around 150,000 businesses and protect over 2.4 million jobs in these sectors.<sup>11</sup> In total, over £37 billion in support through grants, tax relief and loans was granted to the hospitality, leisure and tourism sectors.<sup>12</sup>

**Domestic visitor numbers appear to have recovered to - or close to - 2019 levels.** According to data collected by VisitBritain, British residents made 100 million overnight trips in England between April and December 2021, contributing a total of £22.2 billion in spend. Whilst these figures should not be directly compared to 2019 data due to the methodological changes explained in Section 2, supplementing with other sources of data such as hotel occupancy rates and revenue data may also indicate a recovery in domestic tourism.

**International visitor numbers and spending, however, remain below 2019 levels.** For the full 2022 calendar year, inbound visits are estimated to have reached 29.7 million - 73% of the visits seen in 2019.<sup>13</sup> In terms of revenue, inbound visitor spend is estimated to have reached £25.9 billion in 2022 (not adjusted for inflation), which is 91% of 2019 levels.<sup>14</sup> Inbound tourism from North America appears to be recovering particularly quickly,<sup>15</sup> while travel from China has been heavily restricted. The Chinese market was worth approximately 6% of total UK inbound expenditure in 2019,<sup>16</sup> and its reopening will undoubtedly create a boost for UK tourism. In addition, the depreciation in the Pound is likely to have a positive impact on recovery, at least in the near term, as a favourable exchange rate makes Sterling-denominated purchases relatively cheaper, potentially attracting a greater number of foreign visitors.

Whilst the Tourism Recovery Plan originally set a target of recovering inbound tourism by the end of 2023, this target has been reassessed given the continued challenges to international travel over the course of 2021 and 2022: the government's aim is now to recover 2019 levels

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<sup>11</sup> [Hospitality Industry and Retail Trade: VAT. Question for Treasury UIN 56301, tabled on 15 October 2021](#)

<sup>12</sup> Encompasses the value of support to organisations in the "Accommodation and Food Services activities" and "Arts, Entertainment and Recreation" sectors, from: Coronavirus Job Retention Scheme (CJRS); Self-Employment Income Support Scheme (SEISS); Coronavirus Business Interruption Loan Scheme (CBILS); Bounce Back Loan Scheme (BBLs); Cultural Recovery Fund (CRF), and VAT Cut, up to Sept 2021.

<sup>13</sup> VisitBritain (2023), [2023 tourism forecast](#)

<sup>14</sup> VisitBritain (2023), [2023 tourism forecast](#)

<sup>15</sup> VisitBritain (2023), [2022 monthly data](#)

<sup>16</sup> Calculated using International Passenger Survey data published by [VisitBritain](#). In 2019 visitors from China accounted for £1.6bn of a total £28.45bn spent by all visitors to the UK.

of inbound visitors and spend by the end of 2024, still a year sooner than independent forecasts predict, to ensure the target remains ambitious but realistic.

**The challenges facing the sector prior to COVID-19 still exist.** The industry has been held back by structural barriers such as: seasonality reducing the productivity of tourism businesses outside of peak holiday periods; the concentration of tourists in ‘hotspots’, not least the dominant market in the South East, hindering the benefits of tourism being spread around the country; an overcrowded and disparate landscape of regional tourist boards inhibiting strategic coordination; increasing international competition to attract tourists reducing the UK’s market share; and labour shortages suppressing business’ viability.

- **The global travel market is increasingly competitive**, with the size of the overall ‘pie’ increasing as more tourists have the means to travel, but the UK’s share of that ‘pie’ dropping even pre-pandemic from 6th most visited country in the world in 2016 to 10th in 2019.<sup>17</sup> Boosting the competitiveness of the UK - including through marketing and promotion and by ensuring that the country is welcoming to tourists in terms of visa offer and border welcome - is key to tackling this challenge.
- **The inbound visitor economy is heavily skewed towards London and the South East**, with London accounting for 52% of all international inbound overnight stays and 56% of all international visitor spend in 2019.<sup>18</sup> Domestic tourism also tends towards certain areas such as Cornwall and the Lake District.<sup>19</sup> This not only minimises the potential for spreading the benefits of tourism more evenly to local communities across the country, but also creates a risk of ‘over-tourism’ in some areas where significant numbers of visitors can have a negative impact on local communities or the natural environment. Addressing geographic dispersal, domestic connectivity and the sustainable management of tourist sites are vital to levelling up and supporting local communities across the UK.
- **Seasonality is another barrier to productivity**, with visitor numbers dropping outside of the peak spring and summer tourist seasons,<sup>20</sup> impacting the ability of tourism businesses to retain staff year round and reducing economic productivity.<sup>21</sup> Addressing seasonal dispersal by, for example, increasing the range of attractions or bringing in business events at ‘off-peak’ times of year, has the potential to unlock substantial growth from the sector.

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<sup>17</sup> UNWTO (2020), [World Tourism Barometer and Statistical Annex, December 2020](#)

<sup>18</sup> Calculated using International Passenger Survey data published by [VisitBritain](#). In 2019 London accounted for 21.7m visits and £15.7bn in spend, of a total 40.86m visits and £28.3bn in spend.

<sup>19</sup> Kantar (2020), [The GB Tourist 2019](#)

<sup>20</sup> VisitEngland (2020), [Great Britain Domestic Overnight Trips Summary - All Trip Purposes – 2019](#)

<sup>21</sup> ONS, [Dataset Labour productivity by industry division](#)

- **Labour shortages have historically been and continue to be higher than average in the ‘Accommodation and Food Services’.** In December 2022 to February 2023 there were 6.5 vacancies per 100 jobs in hospitality, compared to 3.7 across all sectors.<sup>22</sup> A recent survey showed that 24% of respondents in the ‘Accommodation and Food Services’ sector said they were suffering from worker shortages, compared to 12% for all industries. Of these, 10% had to pause trading some of the business and 27% were unable to meet demand,<sup>23</sup> restricting the earning potential of businesses across these sectors.
- **Destination Management Organisations (DMOs),<sup>24</sup> who develop, bring together and promote a region and its destinations, have been struggling for a long time** due to reduced funding - both private and public -<sup>25</sup> compounded by the pandemic, leaving little money to invest in strategic regional recovery. They are also facing long-running structural issues and challenges from the overall fragmentation of the DMO landscape, which the independent de Bois DMO Review and the government's subsequent response to the Review are addressing.

As this report outlines, government and industry are working closely together to target these issues and to remove barriers to growth within the framework of the Plan. It must however be noted that these are long-standing challenges that will only be resolved in the medium to long term.

**Those existing challenges have been compounded both by the pandemic and by new global crises.** Putin’s invasion of Ukraine has triggered not only a humanitarian crisis but significant economic damage that is having global repercussions, including a slowdown in global growth and increasing inflation - with the Consumer Price Index rising to 10.1% in the 12 months to January 2023.<sup>26</sup> Increases to the cost of living have threatened both to leave consumers with less disposable income for tourism and to leave businesses with high bills on top of the repayment of COVID-19 loans. High inflation is also weighing on the levels of private investment in the sector, impacting recovery and slowing growth. Many businesses are left fragile and struggling to remain viable after more than two years of significant profit margin erosion.<sup>27</sup>

**In response, the government has taken action to support businesses in the short term and has announced ambitious priorities to drive further economic growth and deliver fiscal**

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<sup>22</sup> Office for National Statistics (2023), [Vacancies by Industry](#), March release, figure for Accommodation and Food Services.

<sup>23</sup> Office for National Statistics (2023), [BICS wave 77](#)

<sup>24</sup> Soon to be renamed Local Visitor Economy Partnerships (LVEPs) as per the de Bois DMO Review recommendation

<sup>25</sup> Local Authority expenditure on Tourism dropped from £198m in 2009-10 to £95m in 2021-22. See gov.uk, [Local authority revenue expenditure and financing](#); see also [The de Bois Review: an independent review of Destination Management Organisations in England](#)

<sup>26</sup> The Consumer Prices Index (CPI) rose by 10.1% in the 12 months to January 2023, down from 10.5% in December 2022 and from a peak of 11.1% in October 2022: ONS (2023), [Consumer price inflation, UK: January 2023](#)

<sup>27</sup> UK Hospitality (31 October 2022), [Third of hospitality businesses at risk of going bust due to soaring costs, new survey reveals](#)



**sustainability.** To protect both domestic users and businesses from rising energy costs, the government introduced an Energy Price Guarantee and a six month Energy Bill Relief Scheme which was followed by an Energy Bill Discount Scheme for businesses, and has also outlined steps that will be taken to tackle longer term issues around the UK's energy supply. In January 2023, the Prime Minister announced his priorities for building a better and more prosperous future for the country. These include halving inflation in 2023; growing the economy, creating better-paid jobs and opportunity right across the country; and driving regeneration through investment in local areas to boost growth.<sup>28</sup> These priorities build on announcements made in the Autumn Statement 2022, which included a package of targeted support to help with business rates costs worth £13.6 billion over the next 5 years.<sup>29</sup> That package included extending and increasing the Retail, Hospitality and Leisure relief scheme from 50% to 75% for 2023-24, up to £110,000 per business - with an estimated 230,000 businesses eligible to receive this increased support worth £2.1 billion. Moreover, the government is providing additional support to protect small businesses that are due to lose eligibility or see reductions in either Small Business or Rural Rate Relief (SBRR or RRR) due to new property valuations at the 2023 revaluation. The Supporting Small Businesses Scheme will provide over £500 million in support over the next 3 years to cap bill increases at £50 per month for an estimated 80,000 small businesses. Together with the Retail, Hospitality and Leisure relief, no eligible small retail, hospitality or leisure business losing eligibility for SBRR or RRR will see an increase in bills greater than £12.50 per month in 2023 (£150 per year). Overall, this package means that the total increase in business rates bills will be less than 1%, compared to over 20% without intervention.<sup>30</sup> The Autumn Statement also sets out measures to boost growth and productivity by investing in people, infrastructure, and innovation. These include additional support to increase labour market participation; increasing public investment in infrastructure across this Parliament; delivering planned skills reforms; and supporting R&D by increasing public funding to £20 billion in 2024-25.<sup>31</sup>

**Looking ahead, there is significant potential for a thriving tourism sector to be an engine for growth across the UK, creating jobs, generating inward investment and driving spend in local and regional economies.** IATA, a global aviation trade association, notes that travel markets are recovering and growing,<sup>32</sup> and the World Travel and Tourism Council is forecasting an extra 70,000 jobs a year in the UK travel and tourism sector over the next decade.<sup>33</sup> Supporting the recovery of the UK's tourism sector and bolstering its resilience and innovation will ensure the UK is in a strong position to tap into growing global travel markets and to maximise the opportunity for tourism to drive economic growth for the country. The

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<sup>28</sup>Prime Ministerial [Speech](#), January 2023

<sup>29</sup>HM Treasury (2022), [Autumn Statement 2022](#)

<sup>30</sup>[Autumn Statement 2022: Business Rates Factsheet - GOV.UK](#)

<sup>31</sup>HM Treasury (2022), [Autumn Statement 2022](#)

<sup>32</sup> International Air Transport Association (1 March 2022). [IATA - Air Passenger Numbers to Recover in 2024](#)

<sup>33</sup> See Oxford Economics research for the World Travel and Tourism Council (2022), [Economic Impact Report 2022: Global Trends](#), and UK results summarised in WTTC's [press release](#). Note that the Travel and Tourism sector is broader than the Tourism sector, and includes direct, indirect and induced impacts.

government's Autumn Statement sets out measures across business rates relief, investment, infrastructure and skills which can help to deliver accelerated recovery and support the sector to achieve this growth potential. Capitalising on emerging consumer trends will also be important for the sector to remain competitive: post-pandemic, the WTTC has identified preferences towards less familiar and less crowded destinations; towards exploring nature and prioritising sustainability; and towards seeking out health and wellness experiences.<sup>34</sup>

**The tourism industry proved, pre-pandemic, that it can significantly contribute to growth and job creation; and it is a sector that can play an important role in the UK's post-pandemic recovery.** To tap into this potential, the objectives set out in the Plan - to recover and stimulate increased demand for domestic and international tourism across the country and to make the sector more resilient, innovative, sustainable and accessible - remain highly relevant, and government will continue to support the sector to drive towards them.

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<sup>34</sup>World Travel and Tourism Council (2021), [Emerging consumer trends in Travel & Tourism in 2021 and beyond](#)

## Working in Partnership

The mechanisms for engagement within government and with industry stakeholders have been transformed post-COVID in order to deliver on the objectives laid out in the Tourism Recovery Plan; to monitor the impact of government interventions; to develop and agree future interventions to support the sector; and to facilitate joined up policy solutions across linked sectors including hospitality, food and transport.

Two new Inter-Ministerial Groups have been established to facilitate close working between government departments and with the devolved administrations. The government’s key stakeholder engagement forum, the Tourism Industry Council, has been refreshed and expanded to focus on four key delivery priorities: Events; Inclusivity and Accessibility; International Competitiveness and Demand; and Sustainability. Policy development undertaken by the Working Groups informs the discussions of the Council, which in turn feed directly into discussions at the Inter-Ministerial Group for the Visitor Economy.



Karin Sheppard, SVP and Managing Director, Europe at IHG Hotels and Resorts, said:

*“As Co-Chair of the Tourism Industry Council, I am delighted to play a role in highlighting the importance of our critical industry to the UK economy. I believe the visitor economy can be a formidable engine of economic growth and with the right conditions and the right support from government, the UK can continue to flourish as a key global visitor destination and a driver for investment into our country’s national and local economy, creating new jobs and turbo-charging economic growth.*

*As we make strong progress on the delivery of the government’s Tourism Recovery Plan, we can build on our successes and continue our journey towards a more sustainable and resilient industry for the future, ensuring the benefits of our sector’s recovery are felt in all corners of the country.”*

The National Tourist Board, the British Tourist Authority (BTA, trading as VisitBritain and VisitEngland) is leading on many aspects of the Plan. The BTA plays a unique role in building England's tourism product, raising Britain's profile worldwide, increasing the volume and value of tourism exports and developing England and Britain's visitor economy. The BTA has a key part to play in supporting the sector to recover and thrive, including by working with government and the Tourism Industry Council to drive forward the implementation of the Plan's objectives.

Nick de Bois CBE, Chair of the British Tourist Authority, said:

*“VisitBritain/VisitEngland worked closely with the government to develop the Tourism Recovery Plan during a uniquely challenging time for our sector. We have welcomed the ambitious targets to quickly rebuild visitor numbers and spend. Since its publication the Plan has been an important driver of cross-government and sector-wide collaboration to deliver against these goals.*

*I am delighted that this important sector is now starting to show promising signs of recovery. In these challenging economic times, the sector is well-placed to support jobs, drive growth, and generate inward investment to the UK at pace. However we are also operating in an incredibly competitive global environment, as every destination vies to rebuild international visitor numbers; and at home the impacts of rising costs and staff shortages are being felt by businesses.*

*VisitBritain/VisitEngland continues to work alongside the sector to deliver the ambitions of the Plan and support businesses as they navigate on-going challenges. We are determined to ensure that post-recovery, the sector is supported to rebuild, more sustainable and resilient than ever.”*

This approach to working collaboratively and innovatively to bring together government departments, devolved administrations, public bodies and private sector partners will support effective policy-making, capitalise on sector engagement and expertise, and raise the profile of the visitor economy across government - all supporting the tourism sector to unlock its potential as a significant contributor to the UK's economic growth. Further information is included under 'Overseeing and Driving Action' in Section 2.

## Section 2 - Progress against Objectives

### Short to Medium Term

#### Objective 1: To swiftly recover pre-pandemic levels of domestic and international visitor volume and spend

The Plan stated an ambition to have recovered annual domestic overnight trip volume to 99 million and spend to £19 billion by the end of 2022, and annual inbound visitor volume to 41 million and spend to return to £28 billion by the end of 2023. This aim was underpinned by activity in three areas: reopening safely, supporting businesses and stimulating demand.

#### Overview

The picture of recovery is mixed, with some elements of the visitor economy recovering well and others recovering more slowly. Data suggests that domestic tourism may have broadly recovered: whilst direct comparisons on domestic tourism trips and spend cannot be made due to survey changes, hotel occupancy data suggests domestic trip volume may have recovered to 2019 levels, and hotel revenue data provides an encouraging indication that domestic tourism spending is recovering at or close to 2019 levels, though caution should be taken when extrapolating indirect, partial indicators to the whole domestic tourism sector.

International tourism is a more complex picture, with some markets such as the US rebounding very strongly, while China – another substantial market –<sup>35</sup> remained largely closed to international travel until early 2023. Overall in 2022, arrivals to the UK are expected to have achieved 73% of 2019 levels and inbound spend to have reached 91% of 2019 levels (before adjusting for inflation; 78% in 2019 prices).<sup>36</sup> Given the ongoing challenges to international travel, the Plan's original target of recovering inbound tourism to the UK by the end of 2023 will shift to recovering those numbers by the end of 2024. This is still a year sooner than independent forecasts predict,<sup>37</sup> and will ensure the aim remains ambitious but realistic.

The recovery of domestic tourism should be celebrated and further encouraged by government and industry. However, despite positive trends domestically, businesses in the sector continue to struggle due to the continued shortfall in international visitors and the profit margin erosion created by global inflation, high levels of debt, labour shortages and supply side costs.

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<sup>35</sup> 809,437 visits and £1.6bn spent by Chinese inbound visitors to England in 2019. International Passenger Survey data published by [VisitBritain](#).

<sup>36</sup> VisitBritain (2023), [2023 tourism forecast](#). 2019 price value calculated by DCMS using [ONS CPI series](#) (15 February release), comparing CPI index for December 2022 and December 2019.

<sup>37</sup> Oxford Economics (2021), [UK tourism scenario forecasts](#)

## Domestic Recovery

Over the course of 2020-2021, the government introduced and removed restrictions on businesses and social contact in line with the public health risk at the time. By July 2021, all businesses were reopened and by February 2022, the government was able to safely lift all remaining COVID-19 measures such as the wearing of face masks indoors. The emergence of the Omicron Variant delayed domestic recovery at the beginning of 2022, including in terms of its impact on consumer confidence, however by December hotel occupancy rates in England reached 2019 levels.<sup>38</sup>

Businesses were able to weather the pandemic with assistance from the government's packages of financial support. A total of £37 billion was provided to the tourism, leisure and hospitality sectors in the form of grants, loans and tax breaks, helping businesses to survive the pandemic and take advantage of the full reopening of the sector. Over £1.5 billion in grants and loans was provided to around 5000 organisations through the package of measures that comprised the Culture Recovery Fund (CRF), with beneficiaries across the country including a number of significant cultural and heritage visitor attractions including DCMS-sponsored museums and galleries.<sup>39</sup> A VAT cut for tourism and hospitality was put in place until the end of March 2022, Business Rates Relief for retail, hospitality and leisure businesses was extended and increased from 50% to 75% in 2023-24 up to £110k per business, and the Recovery Loan Scheme for SMEs has been extended for a further two years until August 2024. The government also worked with the British Tourist Authority to deliver a targeted £300,000 Destination Management Company and Inbound Tour Operator Amplification and Distribution Fund.

To stimulate the growing demand for staycations, VisitEngland was able to invest in domestic marketing through the 'Escape the Everyday' campaign, partially funded by the GREAT campaign, focused on promoting the products of the Discover England Fund to domestic consumers. Many of the Fund's products tapped into the renewed interest in outdoor experiences and lesser-known destinations, and VisitEngland figures indicate a substantial return on investment of £16.6:1.<sup>40</sup> The campaign also provided £2 million for Destination Management Organisations to market their regions to domestic audiences, to encourage tourism and distribute its economic benefits to more regions across the country. Stimulus schemes such as the £10 million National Lottery 'Days Out' campaign, and marketing around large events such as HM The Queen's Platinum Jubilee, UNBOXED: Creativity in the UK, and the Birmingham Commonwealth Games (which included a £24m

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<sup>38</sup> VisitEngland (2022), [Accommodation Occupancy: Latest results](#). As of December 2022.

<sup>39</sup> List of recipients available from [Arts Council England](#) and [Historic England](#)

<sup>40</sup> BTA calculations, based on BTA's internal Return On Investment (ROI)

Business and Tourism programme aimed at boosting tourism numbers and spend in the West Midlands) have also continued to aid domestic tourism recovery.

### *Measuring Recovery*

The Plan's target was to recover domestic visitor volume to 99 million and spend to £19 billion by the end of 2022.

VisitBritain's Great Britain Tourism Survey (GBTS) and Great Britain Day Visits Survey (GBDVS) found that in 2021 (the latest available data) British residents made 100 million overnight trips in England between April and December, contributing a total of £22.2 billion in spend.<sup>41</sup>

The 2021 figures should not be directly compared to previous years due to several significant methodology changes made by the producers of GBTS and GBDVS since 2019. It will be possible to make comparisons and understand the trend from 2021 onwards once data for 2022 is available later this year. In the interim, DCMS has analysed a range of alternative data sources to build a picture of how domestic tourism is recovering.

Hotel occupancy data gives an insight into demand for accommodation and the level of trip activity. Figure 1 shows that in 2022, serviced accommodation occupancy rates in England rose to 2019 levels. This recovery was well-spread across England's regions and destination types, though Greater London was slightly behind - and the greater volume of rooms in London explains why England's occupancy average remains slightly lower than in 2019.<sup>42</sup>

It isn't possible to break down occupancy data according to domestic or inbound tourists, nor by leisure or business visitors, and in 2022 other survey evidence indicates that an increase in inbound and business tourists will have contributed to occupancy figures.<sup>43</sup> However, some regions have historically been much more popular with domestic than overseas tourists, and so provide a better indication of domestic tourism trends. For example, 89% of visitors to the North East in 2019 were from the UK, 88% to Yorkshire and the South West, compared with 36% to Greater London.<sup>44</sup> Focusing on these regions only (asterisked in figure 2), their room occupancy has returned to or exceeded 2019 levels.

It is possible that hotel occupancy measures overstate trips compared to previous years because of ongoing workforce shortages:<sup>45</sup> hospitality businesses' coping strategies include closing on certain days or reducing the number of rooms available.<sup>46</sup> This means that the number of rooms occupied could be lower while the occupancy rate was the same, due to

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<sup>41</sup> VisitBritain (2022), Great Britain Tourism Survey

<sup>42</sup> VisitEngland (2023), Accommodation Occupancy series. Occupancy is defined as Rooms Sold / Rooms Available.

<sup>43</sup> VisitEngland (2022), Overnight Domestic Travel - Summer 2022

<sup>44</sup> DCMS calculations using VisitBritain's sub-regional breakdown of International Passenger Survey data, and GBTS data.

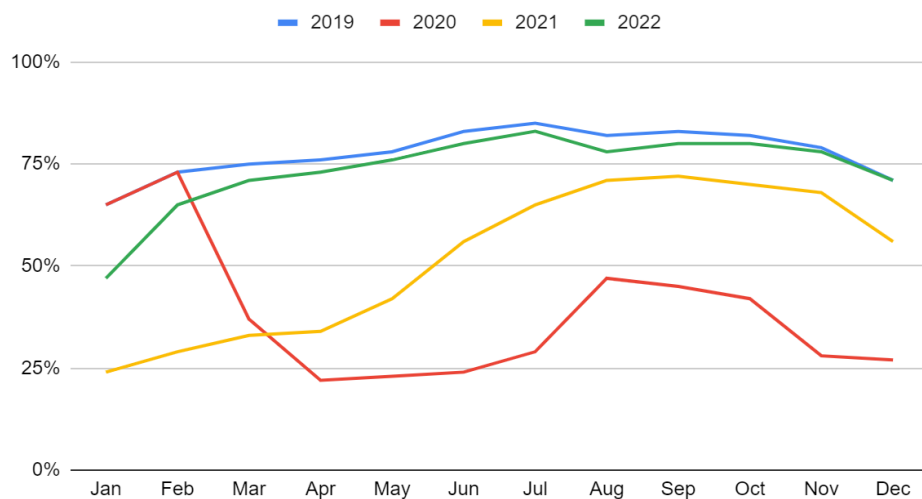
<sup>45</sup> See for example UKHospitality (2022), Record staff shortages causing hospitality to lose £21bn in trade - UKHospitality; ONS Business insights and impact on the UK economy

<sup>46</sup> PwC (2022), Hotels Forecast 2022-2023

fewer available rooms. However, without further data it is not possible to draw firm conclusions on this point.<sup>47</sup> Workforce and resilience are covered further below under Objective 3.

For non-serviced accommodation (e.g. self-catering, short term lets), there are no official estimates available but third party estimates indicate that self-catering properties in England may have enjoyed a stronger peak season in 2020 compared to 2019,<sup>48</sup> perhaps due to a preference during the pandemic for self-contained units compared to hotels. Official data is collected in Wales, where self-catering occupancy exceeded 2019 levels in 2021, and Scotland, where occupancy is almost at 2019 levels.<sup>49</sup>

Figure 1 Room occupancy in England by month, year



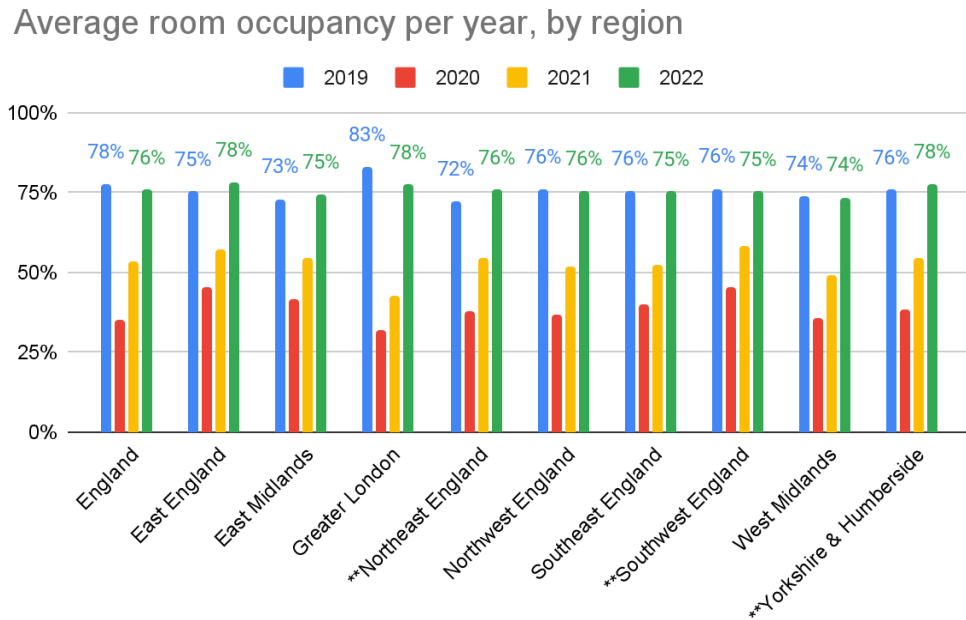
<sup>47</sup> ONS data indicates that on average in 2022, 34% of respondents in Accommodation and Food Services (AFS) were experiencing worker shortages, and of these, 30% had to pause trading some of the business. However, Accommodation and Food Services is dominated by food businesses (77% of AFS by turnover and 81% by number of businesses) so it is difficult to distinguish the potential impact on hotel services specifically. ONS Business insights and impact on the UK economy

<sup>48</sup> For example, see Professional Association of Self Caterers UK (2021), Economic Impact of Self-Catering Sector to the English Economy, Appendix

<sup>49</sup> Welsh Government (2022), Wales tourism accommodation occupancy surveys: 2021; VisitScotland (2023), Self catering research and insights



Figure 2



*Source for Figures 1 and 2: VisitEngland<sup>50</sup>*

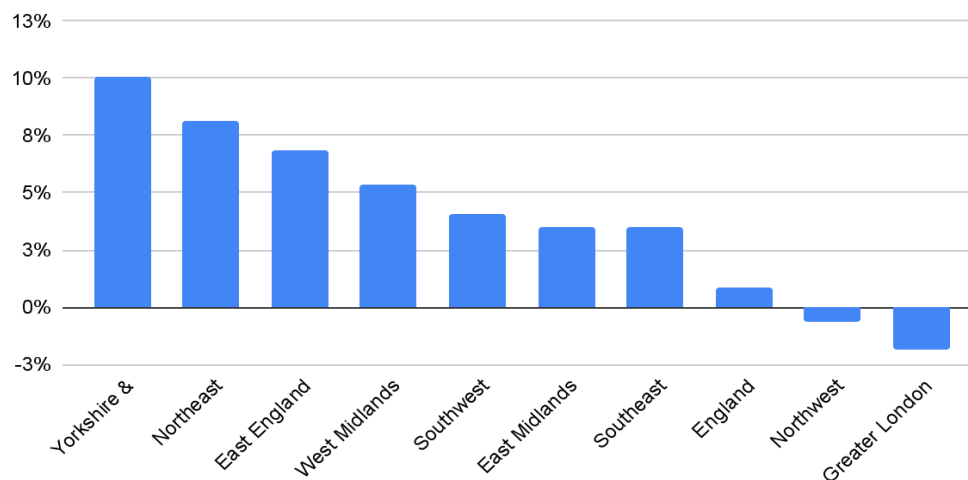
Turning to domestic tourism spend, revenue per available room (RevPAR)<sup>51</sup> in the hotel sector can provide a useful indicator of spending on accommodation. RevPAR in England increased steadily over 2022, and in December 2022 was 14% above the 2019 equivalent.<sup>52</sup> The 2022 average was nearly £87, compared to a 2019 average of nearly £76. Before adjusting for inflation, the RevPAR exceeds 2019 values in all regions; after adjusting for inflation, it exceeds 2019 equivalents in all regions except Greater London and the Northwest (see figure 3). Data for self catering units was not available.

<sup>50</sup> VisitEngland (2023), Accommodation Occupancy series

<sup>51</sup> RevPAR is total room revenue divided by the total number of available rooms

<sup>52</sup> VisitEngland, Accommodation Occupancy series

Figure 3 Average RevPAR in 2022 versus 2019, inflation adjusted



Source: VisitEngland<sup>53</sup>

Looking beyond accommodation to other spending categories, the recovery of turnover in the food service sector (December 2022 was 21% above December 2019) is a positive sign.<sup>54</sup> For spending on other activities, VisitEngland’s Visitor Attractions survey indicates that gross revenue at attractions recovered strongly from its 2020 low and was 13% below 2019 levels in 2021; 2022 data is not yet available.<sup>55</sup>

Taking all of these sources into account, whilst the data on trip spend is more incomplete, what is available is encouraging. Revenue for serviced accommodation - one of the key spend categories on an overnight trip - is at or above 2019 levels in all of the regions typically favoured by domestic tourists.<sup>56</sup>

In a context of global inflation and increased cost of living, reductions in consumers’ disposable income present a potential barrier to the continued recovery of the domestic tourism sector. VisitEngland’s consumer sentiment survey showed that in March 2023, 29% of people were reducing the number of overnight trips in the UK, with other strategies including spending less on accommodation, cutting spending on eating out and undertaking activities, and instead looking for more free things to do on their trips.<sup>57</sup> Positively, these figures have fallen since September (40%), hinting that confidence may be improving, but they do still indicate how challenging recovery is for hospitality and paid visitor attractions, tours and experiences. The government will continue to monitor the impact of inflation on

<sup>53</sup> VisitEngland (2023), Accommodation Occupancy series

<sup>54</sup> ONS (2023), Monthly Business Survey: February 2023 release. Turnover in Food Services in December 2022 was 21% higher than December 2019. Note that in 2019 all tourism (inbound and domestic) accounted for over 20% of food and beverage services GVA. See ONS (2021), Tourism Satellite Account: 2019

<sup>55</sup> VisitEngland (2022), Visitor Attraction Trends in England 2021: Full Report

<sup>56</sup> VisitEngland, Accommodation Occupancy series

<sup>57</sup> VisitEngland (2023). [Domestic Sentiment Tracker: March 2023](#).

household spending power and consumer demand for leisure and tourism.

The government also recognises that the broadly positive recovery of domestic tourism revenue to 2019 levels does not necessarily translate into profit for businesses in the visitor economy. For those businesses and destinations more reliant on inbound visitor spend, the fact that international visitor numbers are still down on 2019 levels means their recovery is not yet complete, as the Association of Leading Visitor Attractions recently highlighted.<sup>58</sup> UKHospitality estimates there is approximately £10 billion of debt in the sector, which could take as long as two years to repay.<sup>59</sup> This has been compounded by ongoing inflationary pressures negatively affecting profit margins as revenues fall or stagnate and costs rise. Producer Price Indices show that the cost of materials and fuels purchased (input prices) and factory gate prices (output prices) rose by 35% and 26% respectively between March 2020 and January 2023.<sup>60</sup> Energy costs have been one of the main factors which have increased the cost of business, having been driven up by volatile global events. This is why the government is taking action to support businesses - including those in the tourism sector - with energy bills and business rates, as well as with longer term measures set out in the Autumn Statement 2022 and a commitment to simplifying taxes for businesses.

Kate Nicholls OBE, CEO of UKHospitality said:

*“Hospitality is at the beating heart of the UK’s global tourism offering – contributing to economic growth and employment in each and every community and constituency across the UK. And our hospitality businesses are not just important economically, they are also important socially and culturally, featuring as the top drivers for visits and as attractions in their own right as well as delivering social experiences which have been driving renewed enthusiasm from tourists to visit the UK following the pandemic. They have played a big role in the sector’s strong recovery from Covid-19.*

*With the onslaught of the energy crisis on hospitality – the twin challenges of the cost of doing business and the cost of living impacting on footfall, revenues and profitability - our path to full recovery will be longer than expected. The Tourism Recovery Plan sets out a clear set of objectives for a cross governmental response to address that in order to unlock a faster return to growth, investment and job creation as well as careers.”*

Paul Flaum, CEO of Bourne Leisure, said:

*“There is a vast opportunity to grow the domestic tourism industry, which contributes significantly both to the UK economy and to boosting the social fabric of the UK. We need to encourage people to holiday closer to home - to choose Blackpool over Benidorm - in order to pump money into local economies, to create local jobs, and to truly level up the*

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<sup>58</sup> ALVA (17 March 2023), [Visitor numbers to the UK’s most popular attractions increase by an average of 118% according to ALVA’S 2022 visitor figures](#)

<sup>59</sup> Oral evidence to the Digital, Culture, Media and Sport Committee, [Oral evidence: Promoting Britain Abroad, HC 856](#), Q166

<sup>60</sup> ONS (2023), [Inputs into Manufacturing \(GHIP\)](#), 15 February 2023 release; ONS (2023), [Manufactured Products for Domestic Market, Excl Duty \(GB7S\)](#), 15 February 2023 release

*country. Taking advantage of this opportunity will require a partnership between government and industry to tackle existing barriers to growth, private investment, and global competitiveness - including the huge pressure that cost inflation and energy cost increases are having on profits.”*

### International Recovery

The government eased border health measures incrementally over the course of 2021 and 2022 according to an assessment of the risk to public health. As the extent to which the UK population was protected through vaccination increased, public health advice evolved and the government adapted border health measures accordingly. The UK became the first G7 country to remove all health-related travel restrictions in March 2022.

Through VisitBritain and the GREAT campaign, the government invested significantly in marketing the UK both domestically and internationally to stimulate demand and support recovery. VisitBritain has been working to promote the UK in all key inbound markets, and has been competing for international visitors through the £14 million global GREAT campaign ‘Welcome to another side of Britain’. The campaign targeted markets with the greatest potential for quickly driving back value - including Europe and the US - by promoting our vibrant cities, heritage, contemporary culture, innovation and sporting excellence to the world and showcasing our hospitality, creativity and warm welcome. This was the first tourism campaign post-pandemic, and VisitBritain analysis indicates it delivered a boost to the UK economy of £190 million and created more than 3500 jobs.<sup>61</sup> The government has also created an exemption from visa requirements and the new Electronic Travel Authorization (ETA) scheme for Gulf Cooperation Council (GCC) nationals, starting in 2023, to provide a boost to international tourism numbers.

Inbound visitor numbers naturally varying over the year in line with the traditional peak spring and summer seasons. Comparing them to the equivalent month in 2019, international tourist arrivals have been gradually regaining ground over the course of 2022, and provisional estimates indicate that in November they reached 2019 levels for that month.<sup>62</sup>

However, inbound tourism has by no means bounced back fully compared to 2019. For the full 2022 calendar year, inbound visits to the UK are estimated to have reached 29.7 million - 73% of the visits seen in 2019.<sup>63</sup> In terms of revenue, inbound visitor spend in 2022 is estimated to have reached £25.9 billion or 91% of 2019 levels,<sup>64</sup> or £22 billion and 78% after

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<sup>61</sup> BTA calculations, based on BTA's internal Return On Investment (ROI)

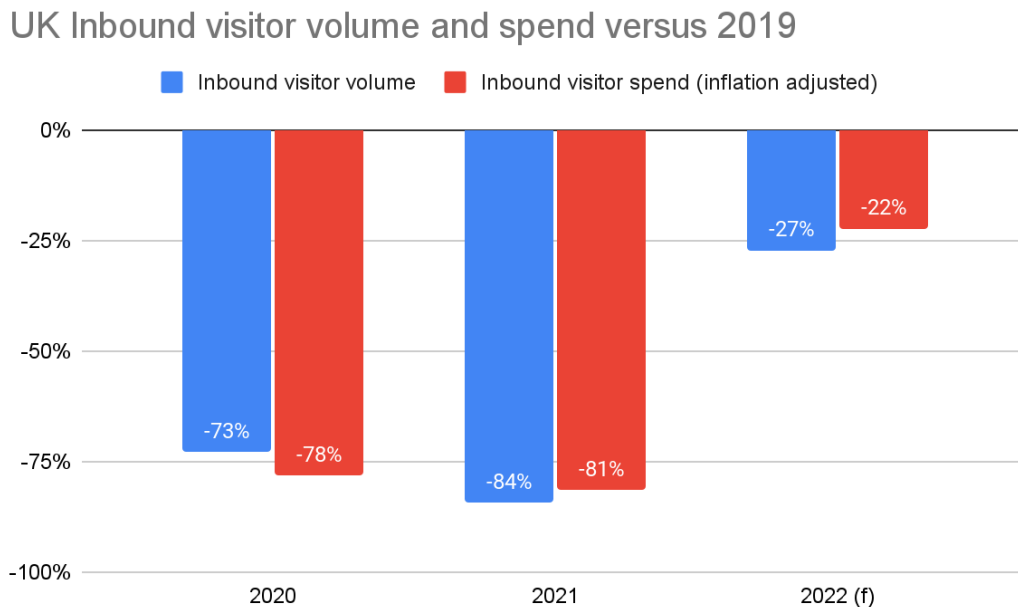
<sup>62</sup> ONS (2023), [Overseas travel and tourism: October and November 2022 provisional results](#) (15 March 2023 release)

<sup>63</sup> VisitBritain (2023), [2023 tourism forecast](#) (updated December 2022)

<sup>64</sup> VisitBritain (2023), [2023 tourism forecast](#) (updated December 2022)

inflation is taken into account.<sup>65</sup> This can be partly attributed to challenges facing travel and tourism globally, such as consumer confidence taking time to return, the cost of living crisis, increased oil prices impacting aviation, and travel restrictions in China throughout 2022 severely curtailing their outbound travel.

Figure 4



*Source: VisitBritain<sup>66</sup>*

Between 2016 and 2021, there has also been a decline in interest in visiting the UK - down from 37% to 24%.<sup>67</sup> As such, there may be other factors at play affecting the UK specifically, such as the perception that Britain does not offer value for money both in terms of higher visa costs and higher hospitality, accommodation and transport prices on arrival.<sup>68</sup> The government will continue to explore all avenues to attract international visitors, working with VisitBritain and transport and tourism businesses, to dispel any negative perceptions of the UK, and to make visiting the UK as easy and as appealing as possible.

## Next Steps

### Supporting Businesses

- The government will continue to support businesses through the Energy Bills Discount

<sup>65</sup> DCMS calculation, deflating VisitBritain forecast value of £25.9 billion by CPI index percentage change between December 2019 and December 2022. CPI taken from [ONS](#) as of 18 January 2023.

<sup>66</sup> DCMS calculations using VisitBritain inbound data for [2019](#), [2020](#), [2021](#) and [2022](#), and deflated using CPI index values for December of the respective years. CPI taken from [ONS](#) as of 15 February 2023.

<sup>67</sup> British Council (2021), [Research and Policy Insight - British Council's global perceptions survey 2021](#)

<sup>68</sup> VisitBritain (2022), [MIDAS: A Global Report. Motivations, Influences, Decisions and Sustainability in a Post-Pandemic Era](#)

Scheme, which runs from April 2023 to March 2024. Recognising that some businesses are particularly vulnerable to high energy prices, users in the 'Energy and Trade Intensive Industries' will receive a higher level of support, including museums, heritage sites and similar visitor attractions, and botanical and zoological gardens.

- The Autumn Statement 2022 announced a package of targeted support to help with business rates costs worth £13.6 billion - including extending and increasing the Retail, Hospitality and Leisure relief scheme from 50% to 75% for 2023-24, up to £110,000 per business, and providing additional support for small businesses.
- The government has committed to embedding tax simplification at the heart of the tax system as a core HM Treasury and HMRC priority.
- The government has announced reforms to Air Passenger Duty (APD) to bolster air connectivity and further align with environmental objectives. These reforms will take effect from April 2023 and include a 50% reduction in APD on domestic flights to support UK-wide connectivity as well a new ultra long-haul band to ensure that those who fly furthest, and have the greatest impact on emissions, incur the greatest duty. Taken together, this package represents an overall tax cut to the aviation industry.
- The government will undertake a Review of Package Travel Regulations (PTRs) in 2023 with a view to enabling businesses in the visitor economy to offer greater choice to consumers. This follows an initial consultation launched in 2021, which led to a government commitment to update and simplify the PTRs, which are part of Retained EU Law, so that the regime provides robust consumer protections whilst supporting business to grow and innovate.

#### Stimulating Demand

- The government will focus on ensuring the UK's international tourism offer is as competitive as possible in terms of visas, border welcome and incentives for high-value visitors.
- The government will continue to monitor the position in relation to inbound group travel, including youth group travel.
- VisitBritain will continue to market their international campaign, "See things differently", targeted at key markets in the EU, US and the Gulf, to stimulate inbound demand and drive the dispersal of tourists across the UK.
- The Tourism Recovery Plan committed to explore the development of a domestic rail tourism product. Since publication, DCMS (working closely with DfT, Rail Delivery Group and VisitBritain) conducted extensive research and development which concluded that, in order to be commercially viable, the product would not provide value for money for consumers. The government will work with VisitBritain and the rail operators to find alternative ways to encourage more people to use UK rail networks to enjoy the leisure and tourism offer around the country.

## Case Study: The Events of 2022

A series of exciting and high-profile events took place in 2022, providing a highly anticipated boost after two difficult years for the visitor economy. Sporting, cultural and business events provided attractive incentives for domestic tourists to explore destinations across the country and for international tourists to make the UK a destination of choice - with the reduction in travel restrictions and testing policies in early 2022 meaning the UK could start to welcome back international visitors from all over the world.

Over the course of the year, visitors witnessed the UK's homegrown talent and explored the nation's incredible cultural, historic and natural heritage:

- In Summer 2022, Birmingham hosted the 22nd Commonwealth Games, the largest multi-sport event to be held in England in 10 years, featuring thousands of world-class athletes and over 1.5 million spectators. The Games captured the imagination of the city, region and audiences across the globe. During the Games, more than 40 top travel buyers, operators and trade media from Australia, Canada and India were hosted on educational visits. The Games were delivered in partnership with the West Midlands Growth Company, and drove significant interest in the UK and the West Midlands region, with the Birmingham 2022 Business and Tourism (BAT) Programme campaign reaching a global audience of 790 million. Over 80% of those surveyed in the BAT Programme's key markets (UK, Canada, Australia and India) report that they are likely to visit the region.<sup>69</sup>
- Her Majesty The Queen's Platinum Jubilee, which took place over 2-5 June 2022, was a unique occasion attracting visitors to join the celebrations. A Platinum Jubilee Trip Tracker, run by VisitEngland, showed that 14% of adults in Britain 'definitely' planned to take an overnight trip over the extended Jubilee weekend at home or abroad.<sup>70</sup> Over 7,500 events across the UK and abroad were added to the Platinum Jubilee events map.<sup>71</sup>
- 'UNBOXED: Creativity in the UK' brought cultural experiences and events to over 107 locations across the UK, spanning rural, urban, seaside and countryside areas, including locations often underserved by the UK's outstanding cultural offering such as Blackpool, Southampton, Paisley, Swansea, Derry-Londonderry, Merthyr Tydfil, Luton, Dundee and Omagh. It helped to build pride in place across the UK and drive additional visitation to these areas, with over 2.8 million people visiting an UNBOXED event in person and SEE MONSTER in Weston-super-Mare attracting more visitors than Banksy's Dismaland did in the same venue. In total, with the 13.5 million people who engaged with broadcast and digital programming and the

<sup>69</sup> [Birmingham 2022 Commonwealth Games: The Highlights](#)

<sup>70</sup> VisitEngland (2022), [Bank Holiday Trip Tracker: Platinum Jubilee](#)

<sup>71</sup> [Platinum Jubilee Events Map](#)

1.7 million involved with learning participation activities, over 18 million people engaged with UNBOXED's diverse programme.<sup>72</sup>

- The UEFA Women's EURO 2022 brought unprecedented interest in the tournament with record stadium attendances, huge numbers of TV viewers and fans following the action online like never before. The UEFA Women's EURO 2022 Roadshow travelled more than 800 miles across England to help more people learn about women's football and develop a connection to this special tournament. Host cities received an £81 million boost in economic activity as a result of the tournament. The Final at Wembley attracted 87,192 fans which broke a new record for a EURO final tournament game. The aggregate attendance also broke a record at the EURO's with 574,975 people in attendance which included 110,555 international spectators from 104 countries. As a result of the tournament, domestic and international visitors made over 552,000 day and overnight trips to host cities with £44 million total spectator spending around matchdays and trips across England.<sup>73</sup>
- Coventry, the UK City of Culture for 2021, delivered an extraordinary year-long programme of events that put culture at the heart of social and economic recovery. Nearly 400,000 tickets were issued for events in the programme, plus an estimated attendance at unticketed events and activities of over 137,000.<sup>74</sup>
- A busy calendar of international business events fuelled recovery throughout the year too. Over 2,000 young leaders from more than 190 countries gathered in Manchester for the One Young World Summit (with Belfast due to host in 2023); Leeds welcomed 4,000 delegates to the inaugural UK Real Estate Investment & Infrastructure Forum; and Glasgow strengthened its post-COP 26 reputation by hosting leading global researchers at the World Congress of Soil Science.<sup>75</sup>
- Trade shows and exhibitions played an equally strong role in the sector's recovery - with events like London Tech Week and the manufacturing technology exhibition MACH fuelling trade and investment across the UK's growth sectors while bringing high-spending visitors to all corners of the UK.<sup>76</sup>

The roster of world-class events continues into 2023 and beyond, with the UK hosting events such as the Eurovision Song Contest and the Golf Open Championship in Liverpool, His Majesty the King's Coronation, the World Snooker Championship in Sheffield, and the Women's Rugby World Cup and Bradford's UK City of Culture programme in 2025. Events

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<sup>72</sup> [UNBOXED: The Journey So Far](#)

<sup>73</sup> [UEFA Women's EURO 2022 positive impact and future legacy revealed in post-tournament flash report](#)

<sup>74</sup> [AY 2022](#)

<sup>75</sup> [The One Young World Manchester 2022, 5-8 September](#); [UKREiiE](#); [World Congress of Soil Science](#)

<sup>76</sup> [New Digital Strategy to make UK a global tech superpower - GOV.UK](#)



such as these will continue to shine a spotlight on the UK, draw domestic and international tourists, and support the UK's tourism sector to thrive.

## Medium to Long Term

Given the continued impact of the pandemic and the more recent economic challenges facing the sector, the short-term focus - especially in those parts of the country particularly damaged by the loss of tourist numbers and spend since 2019 - is still on recovery. However, the government remains committed to working with and supporting the sector to build back better in the longer term and that is the focus of the Plan's remaining five objectives.

### Objective 2: To ensure that tourism benefits every nation and region

The tourism sector has an important role to play in delivering the government's commitment to Levelling Up and driving growth across the country. Tourism creates local jobs and attracts money into local economies; it is an engine for growth, productivity and regeneration. The distribution of domestic tourists away from overcrowded 'hotspots' like Cornwall, and of international tourists away from London and the South East, and towards lesser-known regional destinations, remains vitally important if the benefits of tourism are to be shared across the UK (starkly, 57% of potential international visitors say they "cannot imagine what there is outside of London").<sup>77</sup>

To drive the dispersal of visitors across every nation and region, the government is investing in the visitor economy through funding for cultural and heritage organisations, investment in infrastructure, and boosting connectivity to make it easier for visitors to get around:

- In addition to over £1.5 billion in grants and loans provided to around 5,000 organisations through the Culture Recovery Fund, the government continues to invest through bodies such as Arts Council England, Historic England, and the National Lottery Heritage Fund to support the cultural and heritage assets and attractions that draw domestic and international visitors to destinations across the country. For example, in 2022 Arts Council England announced their latest 2023–26 round of National Portfolio Organisation funding, with a number of important regional and national cultural and heritage visitor sites among their ranks - such as the North Yorkshire Moors Railway Trust, Beamish Museum, and Bristol's Lightbox Theatre.<sup>78</sup> September 2022 also saw the opening of Shrewsbury Flaxmill Maltings, home of the world's first cast iron-framed building and 'grandparent of skyscrapers'. Owned by Historic England, the site has received £21m from NLHF and now welcomes visitors to learn about its architectural significance and discover the stories of the people who worked there.<sup>79</sup>

<sup>77</sup> VisitBritain (2014), [Exploring Britain: Research in Emerging Markets](#)

<sup>78</sup> Arts Council England (November 2022), [2023-2026 Investment Programme](#)

<sup>79</sup> Shrewsbury Flaxmill Maltings (September 2022), ['Grandparent of Skyscrapers' now open](#)

- Regional museums and galleries are a key element of many destinations' visitor economy offer, welcoming domestic and international visitors to sites all over the country. The DCMS/Wolfson Museums and Galleries Improvement Fund supports these organisations to be more accessible and sustainable, with the latest round of £4m - announced late last year - funding projects at the Bowes Museum, County Durham; Hampton Court Palace; and Birmingham Museum and Art Gallery.
- The government has also delivered a number of significant funding streams that could be put towards supporting the ambition to grow tourism in every nation and region, including the £3.6 billion Towns Fund, the £2.6 billion UK Shared Prosperity Fund, the £900 million Getting Building Fund, and the £220 million UK Community Renewal Fund. The £4.8 billion Levelling Up Fund is supporting a significant number of projects across the UK that have a visitor economy element or focus. For example, Eden Project North will receive £50 million to transform a derelict site on Morecambe's seafront into a world class visitor attraction, and Portsmouth is being supported with £20 million to create an urban Linear Park and redevelop the much-loved Hilsea Lido.<sup>80</sup>
- The government also continues to invest in transport infrastructure and connectivity to underpin the success of the UK tourism industry. Leisure travellers will become increasingly important for transport routes if post-Covid reductions in business travel and commuting persist. The government's Aviation Strategy - Flightpath to the Future - sets out a vision for delivering a modern, innovative sector that allows tourism, business and trade to thrive,<sup>81</sup> and the reforms of Air Passenger Duty will support UK-wide connectivity and particularly benefit regional airports which account for the greatest proportion of domestic flights. VisitBritain's new Gateway Innovation Fund will provide grants to deliver international marketing activity for a specific inbound gateway or region, showcasing the best of what the UK has to offer and motivating international travellers to explore the UK in 2023. The government also continues to invest in rail and bus networks, with over £35 billion of rail investment between 2022/23 and 2024/25, including rail enhancements and vital renewals to boost connectivity across the country,<sup>82</sup> plus a commitment to spending £3 billion on buses throughout England this Parliament supporting visitors to travel in a more sustainable way.<sup>83</sup>

Beyond investment, the government is also taking steps to actively support regional tourism. To strengthen the structure and coherence of the regional tourism landscape, the government is taking forward recommendations from the Nick de Bois Review of Destination Management Organisations with the aim of supporting regional areas to better attract and manage

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<sup>80</sup> For a full list of recipients see [Round 1](#) and [Round 2](#) announcements on gov.uk

<sup>81</sup> Department for Transport (2022), [Flightpath to the Future](#)

<sup>82</sup> [Building a better railway - GOV.UK](#)

<sup>83</sup> Department for Transport (2021) [Bus Back Better](#)

tourists.<sup>84</sup> This includes the renaming of DMOs as Local Visitor Economy Partnerships (LVEPs), the introduction of a new accreditation system for LVEPs, and the pilot of a multi-year core funding model, the Destination Development Partnership, in the North East. The Levelling Up White Paper, published in February 2022, set out how the government will spread opportunity more equally across the UK, including through the introduction of Devolution Deals which present an opportunity to further unlock the potential of local and regional tourism.<sup>85</sup> The government has already agreed Devolution Deals with York & North Yorkshire, the East Midlands, Norfolk, Suffolk, Cornwall, and an expanded North East Mayoral Combined Authority - many of which actively highlight the importance of tourism to the region. These and future deals will provide directly elected leaders with funding to spend on their local economic priorities, which could include the visitor economy.

In the medium to long term, once the sector has fully recovered, the government wants to see a shift in consumer behaviour towards visitors staying longer and visiting outside of traditional spring and summer peak seasons. In order to stimulate this demand, many tourism destinations are already working proactively towards extending their tourist seasons to benefit their local economies, such as the English Riviera's 2022 'Bay of Lights' event which encouraged winter visits to the region.

### **Case Study: English Riviera's Bay of Lights**

A partnership between the English Riviera Business Improvement District Company and Torbay Council saw the creation of the 'Bay of Lights' over Winter 2022-23. Taking place throughout Torquay, Paignton and Brixham, the event included lantern parades, a light-covered steam train, and a 1.5-mile-long illumination trail funded by a successful Towns Fund bid from Torbay Council. The region capitalised on its natural and cultural heritage assets - from picturesque seafronts and prehistoric caves to vintage steam trains, model villages and the National Trust property at Coleton Fishacre - and invested in marketing and promotion of the event to encourage visits outside of the traditional spring and summer peak seasons. Attracting visitors in off-peak season and actively encouraging visitors to stay for multiple nights can create jobs and drive spending in local economies - supporting local hotels, hospitality venues and shops.

### **Case Study: Investment in Carlisle**

The £2.6 billion UK Shared Prosperity Fund is a central pillar of the government's Levelling Up agenda. This Fund enables local decision making, to ensure investment is targeted where it is needed most. In areas such as Carlisle - which will receive £4 million up to March 2025 - investment can help to boost the visitor economy. Carlisle City Council, working closely with Allerdale Borough Council and Copeland Borough Council, will use this funding to improve town centres and high streets, enhance support for local cultural heritage institutions, and support local businesses. The investment will also be used to

<sup>84</sup> [Independent review of destination management organisations \(DMOs\) - GOV.UK](#)

<sup>85</sup> [Levelling Up the United Kingdom - GOV.UK](#)

develop the visitor economy - promoting local attractions, trails and tours, and funding campaigns which encourage people to visit and explore the local area. Capitalising on the UKSPF investment to boost visitor numbers and spend can support the local economy, create local jobs, and raise the profile of the incredible cultural, natural and historic assets in Carlisle, from the Cathedral to the Castle, Hadrian's Wall to Tullie House Museum & Art Gallery, and Watchtree Nature Reserve to the Solway Coast Area of Outstanding Natural Beauty.

### Next Steps

- The government will work with VisitEngland to continue implementing recommendations from the DMO Review, including introducing a new accreditation system in 2023 and piloting the Destination Development Partnership, for which the North East has been selected to pilot a new multi-year core funding model.
- The government will continue to deliver the £4.8 billion Levelling Up Fund, which will invest in infrastructure across the UK until 2025, and the £2.6 billion UK Shared Prosperity Fund, which will provide funding for local investment until March 2025.
- The Rural England Prosperity Fund will provide up to £110 million to eligible rural local authorities between April 2023 and March 2025. It will fund capital projects to improve productivity and strengthen the rural economy and rural communities. Investment will be based on local priorities and support a range of projects which could include grants for rural tourism such as investments in visitor accommodation.
- The government will continue to deliver Devolution Deals, providing greater freedoms and flexibilities at a local level, meaning councils can work more effectively to improve the visitor economy in their area.
- The government will work across departments and with the BTA to identify where activity such as marketing and promotional campaigns could contribute to levelling up and driving growth across the country.
- In line with the High Streets Strategy and the Hospitality Strategy, the government will work with local authorities and local businesses to develop hospitality-led regeneration hubs - with demonstrators in every nation of the UK - that will create unique regional offers to attract visitors and create opportunities for local people.
- The government will consider ways to support the development of the country's food and drink tourism offer, raising domestic and international awareness of the wealth and variety of unique local food cultures across the country.
- The Local Government Association will continue to support local councils by providing Leadership Essentials training and improvement support, including piloting training specifically for officials supporting and promoting their local visitor economy.

## Case Study: The Visitor Economy in the North East

Despite its significant visitor 'offer' - with beautiful natural landscapes, incredible heritage assets, and a thriving cultural scene - the North East is a region with historically low rates of both domestic and international tourism. Independent modelling for NewcastleGateshead Initiative (NGI) estimates that the COVID-19 pandemic saw visitor numbers in the region decline by 53% and visitor expenditure by 59%.<sup>86</sup> Data collected by NGI found a mixed recovery picture across the region: it found a strong staycation boom in Northumberland in 2021, whilst visitors were less confident returning to city centres; but in 2022 room occupancy exceeded 2019 levels in Newcastle and Gateshead, supported by the return of major events such as the Rugby League World Cup, the Great North Run, and a strong return of business meetings and conferences in the city.<sup>87</sup>

The region has seen significant visitor economy investment, with £20 million from the Levelling Up Fund going towards the regeneration of Gateshead Quays and the The Sage International Conference Centre (expected to attract an additional 1 million visitors per year), £25 million from sources such as the Culture Recovery Fund for the Remaking Beamish Museum project, £14 million invested in the Ad Gefrin visitor centre, and £15 million invested in creating the new Lilidorei Alnwick Garden play village.

In addition to this investment, other recent developments can support the region to unlock the potential of its visitor economy. In January, a devolution deal was signed with the new North East Mayoral Combined Authority (MCA) which will unlock over £4.2 billion of funding over the next 30 years, giving the Mayor and the councils powers to deliver local priorities. The North East has also been selected to pilot the new £2.25 million scheme to encourage regional collaboration as part of the implementation of recommendations from the de Bois Review of Destination Management Organisations. The project aims to successfully develop the region as a must-visit destination while attracting further private investment and driving growth. Visit County Durham, Visit Northumberland and NewcastleGateshead Initiative have also been named as the first organisations to be nationally recognised by VisitEngland as Local Visitor Economy Partnerships. Additionally, NewcastleGateshead Initiative has

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<sup>86</sup> [STEAM Model](#) run for the region by Global Tourism Solutions

<sup>87</sup> [T STATS](#) reporting produced for Newcastle Gateshead Initiative

been awarded a grant from VisitBritain's GREAT Gateway Innovation Fund to market and promote North East experiences to inbound visitors from the Gulf Cooperation Council, developing an international marketing campaign that showcases the very best of the North East and motivates inbound tourism in 2023.

Within government, the new Inter-Ministerial Group on the Visitor Economy - established to ensure a strategic approach to supporting the sector - commissioned DCMS to lead an innovative 'Policy Sprint' in 2022. With a focus on the North East, this 'Sprint' looked at how national government, local government, regional partners and the private sector can work together to realise the potential of the visitor economy across the country and support key government objectives around Levelling Up and productivity. The Sprint brought together over 60 stakeholders from 50 organisations in three workshops over two days. Attendees from central government departments, local government, heritage, arts, cultural and sporting bodies were joined by academics, transport, hotel and hospitality representatives and many more to generate a practical set of policy propositions to promote growth and improve productivity at a regional level. Proposals around improving connectivity, boosting promotion of and advocacy for the sector, attracting more business events, supporting skills, and making the UK a more attractive and competitive destination are informing the thinking of government officials about how to support the North East and the visitor economy more widely.

Sarah Green, Chief Executive of NewcastleGateshead Initiative said:

*"NGI is committed to supporting businesses, unlocking growth, and tapping into the huge untapped potential of the visitor economy creating jobs and skills for residents.*

*We were delighted to work with DCMS to create the first ever Inter-Ministerial Government Visitor Economy 'Sprint' to help develop a new vision for the regional visitor economy, and have subsequently committed as the lead organisation on the first Destination Development Partnership pilot to demonstrate the importance of regional collaboration in creating the infrastructure to unlock the potential of the visitor economy.*

*Our region is recovering, but, while we have made good progress, we know that we must work harder than any other region to close the gap in visitor numbers and to deliver on levelling up, creating jobs and opportunities for local residents. Our ambition is to double the value of the visitor economy over 10 years and we are working with all seven local authorities in the North East of England and our colleagues at Visit County Durham and Visit Northumberland to develop a long-term delivery and investment plan to enable this ambition.*

*As one of the first organisations recognised by Visit England as a Local Visitor Economy Partnership (LVEP) we are committed to work closely with government and the sector to drive forward interventions and solutions that will support recovery, growth and levelling up."*



### Objective 3: To build back better with a more productive, innovative and resilient tourism industry

The government remains committed to supporting the future productivity, innovation and resilience of the sector, and this objective of the Plan outlined medium to long term ambitions in the areas of: Digital Innovation and Connectivity, Data, and Skills and Labour.

#### *Digital Innovation and Connectivity*

Digital and data are vitally important to the future of the industry, and there is more to be done to adopt new innovations, improve digital skills and make better use of data.

Government and industry invested £23 million in projects to harness the power of 5G for tourism as part of the 5G Testbeds and Trials Programme: the Eden Universe used its funding to create 360-degree video using 5G to enhance the visitor experience;<sup>88</sup> the Green Planet project used Augmented Reality showcases that attracted 9500 visitors in 4 weeks;<sup>89</sup> and Rural Dorset tested 5G apps to manage council-run tourism sites to improve the visitor experience and better support the conservation of local areas.<sup>90</sup> In December 2022, DSIT launched its first Alpha Trials to test new low-latency Low Earth Orbit (LEO) satellite connectivity to some of the UK's most remote areas as part of the government's plans to ensure everyone can access fast and reliable coverage. Sites set to benefit include Rievaulx Abbey in the North Yorkshire Moors National Park, where improved connectivity will enhance the visitor experience by helping people to better engage with the educational content; and a Scouts Cymru-managed camping site and outdoor activity centre in Crafnant Valley, where improved connectivity will help improve safety for visitors traversing the site as well as enabling new educational resources for visiting groups.<sup>91</sup> Government schemes such as 'Help to Grow: Digital' were also put in place to upskill businesses, and the Digital Boost platform has already helped 300 tourism businesses to build their digital capability.

#### *Data*

In 2022, the government published a Call for Evidence on developing a Tourist Accommodation Registration Scheme in England. Almost 4,000 responses were received, with findings indicating that there is a case for light-touch regulation in the sector. The government is therefore introducing legislation for a registration scheme for short-term lets through the Levelling Up and Regeneration Bill (LURB), and will be consulting in 2023 on how the scheme will operate. A registration scheme could deliver much needed data on short-term lets, improve consistency in the application of health and safety regulations, boost England's reputation, and attract more international visitors by giving visible assurance of England's high-quality guest accommodation offer.

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<sup>88</sup> [5G at Eden](#)

<sup>89</sup> [The Green Planet AR Experience](#)

<sup>90</sup> [About 5G RuralDorset](#)

<sup>91</sup> [Broadband beamed from space to isolated areas under plans to boost countryside internet connections - GOV.UK](#)



Work also continues on data innovation at the border, with the Electronic Travel Authorisation (ETA) scheme being rolled out by the Home Office aiming to digitalise the border and make inbound travellers' journeys smoother and more secure. The government will explore options to harness data gathered from the ETA scheme to inform tourism policy and promotion.

### *Skills and Labour*

The sector continues to face workforce challenges, both in recruiting and retaining workers and in upskilling its workforce. Government and industry are committed to addressing labour and skills shortages to improve the resilience and productivity of the sector. Across all sectors, the labour market was substantially impacted by the pandemic, and labour shortages remain due to the demand for labour recovering faster than the labour supply;<sup>92</sup> accommodation and food services are disproportionately affected.<sup>93</sup> The government put in place various measures aimed at getting people back into employment, including schemes to support a growth in apprenticeships and traineeships, and a national Kickstart programme focussed on supporting 16-24 year olds on Universal Credit to gain skills and experience. The government also launched the Way to Work campaign which helped to drive 500,000 job-ready welfare claimants into work, and has worked with the hospitality sector on innovative campaigns such as encouraging businesses to recruit prison leavers to both rehabilitate offenders and plug workforce gaps.

Businesses in the visitor economy report skills gaps particularly in the areas of customer service and leadership and management.<sup>94</sup> Government schemes have been put in place to support these skills gaps, such as 'Help to Grow: Management' which focuses on training to help SME business leaders to increase productivity, seize investment opportunities and grow their business. Innovative partnerships such as the one between Experience Oxfordshire and Oxford Brookes University have already launched with support from this scheme, showcasing the benefits of building partnerships between regional tourist boards and academic institutions and capitalising on government funding for the benefit of the visitor economy. The Institute for Apprenticeships and Technical Education, which works on behalf of government, regularly brings skills training (such as apprenticeships, T Levels and higher technical qualifications) up to date and speaks to hundreds of employers - including across the tourism and hospitality sectors - to future-proof skills training and support employers to fill skills gaps.

The newly-created, industry-led Hospitality & Tourism Skills Board will work with partners across government to focus on the medium-to-long term objectives of increasing recruitment, enhancing retention, and building a tourism workforce that is adequately and appropriately

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<sup>92</sup>Bank of England (2022), [Monetary Policy Report - August 2022](#)

<sup>93</sup>ONS (2023), [Dataset Business insights and impact on the UK economy](#), wave 77

<sup>94</sup>ONS (2023), [Dataset Business insights and impact on the UK economy](#), wave 75

skilled and able to access effective vocational training.

### **Case Study:**

#### **Oxford Brookes University and Experience Oxfordshire Training Programme**

Oxford Brookes Business School (part of Oxford Brookes University) and Experience Oxfordshire have joined forces to deliver a fully-funded management programme designed to support visitor economy businesses post pandemic. The "Help to Grow: Management" course combines a practical curriculum with one-to-one-support from a business mentor, peer-learning sessions and an alumni network. Businesses will benefit from modules created to enhance their strategic management capability including production of a growth plan building in resilience to future disruption; insights into using digital technologies to boost productivity and operational agility; methods for improving employee engagement and introducing responsible business practices.

The course is fully-funded for businesses across Oxfordshire's visitor economy, thanks to government funding and a fee-waiver from Oxford Brookes University's Business Support Fund. The course runs from March to June 2023 and is open to businesses with 5-249 employees. The course has attendees registered from across the visitor economy including attractions, hotels, tour operators, language schools, pubs and restaurants.<sup>95</sup>

### *Seasonality*

The other challenge to the productivity and resilience of the visitor economy is the seasonal nature of tourism. During clear peak seasons - spring, summer, and the main school and bank holidays - visitor numbers and spending are significantly higher than at other times of the year. This creates a barrier to businesses employing people in year-round jobs and making year-round profit. Measures outlined in other sections of this report - such as government supporting off-season business events and tourist destinations developing off-season visitor attractions - aim to mitigate this barrier, thereby increasing low season visitor numbers and spending and subsequently increasing the number of year round jobs available.

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<sup>95</sup> [Help to Grow - Oxford Brookes University](#)

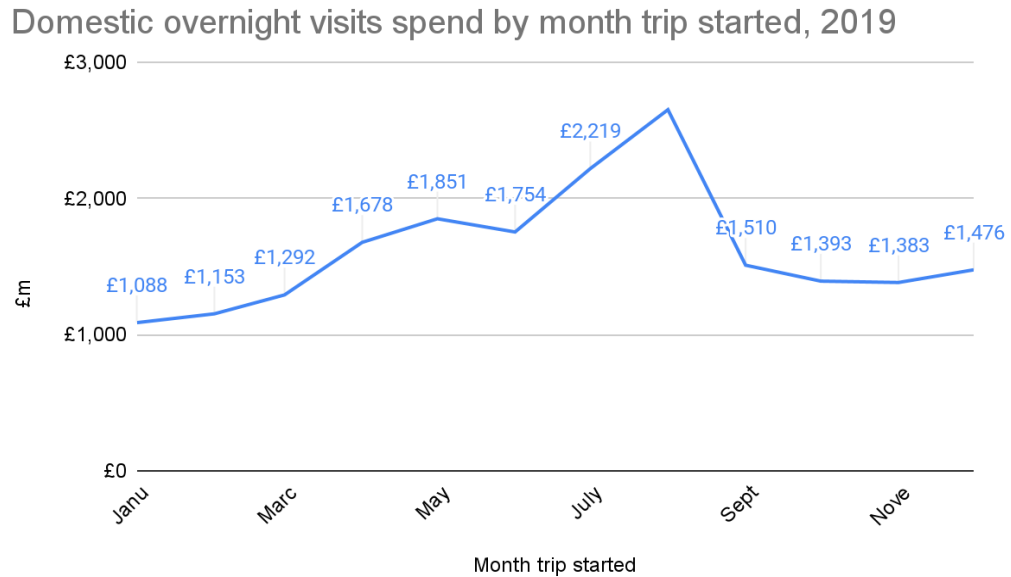


Figure 5

Source: Great Britain Tourism Survey<sup>96</sup>

## Next Steps

### Digital Innovation and Connectivity

- The government will deliver the 2025 UK Border Strategy, which aims to deliver a world class border that will make travellers' journeys smoother and more secure.
- The government will explore how Electronic Travel Authorisation (ETA) data and UK Visas and Immigration (UKVI) commercial platforms can support tourism.

### Data

- The government will publish a public consultation early in 2023 which explores the details of how a registration scheme for short-term lets could operate in England.

### Skills and Labour

- The government will continue to deliver the Plan for Jobs,<sup>97</sup> including through the framework of the Skills for Jobs White Paper<sup>98</sup> which sets out the government's vision for post-16 technical education and training. As part of this, the government is investing £2.5 billion in the National Skills Fund until 2025, to help people gain skills to improve their job prospects, including in sectors such as hospitality.<sup>99</sup>
- The Hospitality & Tourism Skills Board will continue to pursue an employer-led, coordinated and proactive approach towards recruitment, retention and upskilling, including by developing innovative new recruitment campaigns such as Hospitality Rising,<sup>100</sup> developing skills and training, and working closely with government partners.
- Recognising the importance of labour mobility, the government will continue to progress Youth Mobility Scheme arrangements with countries inside and outside the EU to allow participants to work and study whilst here on a cultural exchange.

<sup>96</sup> VisitEngland (2020), [Great Britain Domestic Overnight Trips Summary - All Trip Purposes – 2019](#)

<sup>97</sup> [Plan for Jobs - GOV.UK](#)

<sup>98</sup> [Skills for jobs: lifelong learning for opportunity and growth - GOV.UK](#)

<sup>99</sup> [Skills for Life](#)

<sup>100</sup> [Hospitality Rising Careers](#)

## Objective 4: To ensure the tourism industry contributes to the enhancement and conservation of the country's cultural, natural and historic heritage and minimises damage to the environment

According to industry reports, sustainability continues to emerge as a growing driver for global tourism.<sup>101</sup> With increasing consumer demand for sustainable travel options - from younger travellers in particular - the global sustainable tourism market is anticipated to grow 23% year on year in the next decade, according to research from Future Market Insights.<sup>102</sup> This suggests that developing the sector's approach to sustainability is a key area of opportunity for the visitor economy. Driving a growth in visitor numbers is a key objective of both government and industry, but there is a responsibility to manage this growth in a safe and manageable way for local areas and local communities.

The newly established Tourism Industry Council Working Group on Sustainability has created a partnership between the public and private sector to help to drive this agenda forward: to identify opportunities to take advantage of the growing demand for sustainable travel; to highlight good practice that can support businesses to operate in a more environmentally sustainable way; and to drive a regional dispersal of visitors across the UK which will contribute both to reducing 'over-tourism' and its environmental impact in tourist hotspots as well as to supporting the financial sustainability of local businesses and communities. Chaired by the CEO of the British Tourism Authority, this Group will identify the areas of focus for government and industry, showcase existing areas of best practice within the sector, and present recommendations to the Tourism Industry Council and the Inter-Ministerial Group for the Visitor Economy in the coming year.

The government has announced a number of broader measures that will directly or indirectly support the sustainability of the sector. Government investment is supporting the conservation of tourism assets, such as the £67 million in capital funding for maintenance and restoration projects invested through the Heritage Stimulus Fund and National Lottery Heritage Fund Kickstarter funds, or the £7 million awarded to complete the England Coast Path and Coast-to-Coast National Trail. Grants for digital innovation mentioned previously have been used in projects to identify innovative ways to better manage sites and better disperse tourists to avoid overcrowding. And the government has already spent over £2 billion to support the transition to zero emission vehicles, focusing on reducing the barriers to adoption including accelerating the rollout of chargepoint infrastructure. The growing charging network will contribute to reducing the carbon footprint of tourism, supporting the sustainability of the government's ambition to increase the volume of tourists travelling around the country. Whilst much has been achieved, sustainability is an area of long-term ambition and there is more to do. The government continues to work towards delivering the

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<sup>101</sup> World Travel and Tourism Council (2021), Emerging consumer trends in Travel & Tourism in 2021 and beyond

<sup>102</sup> Future Market Insights (2021), [Sustainable Tourism Market Size, Share & Trends – 2032](#)

25 Year Environment Plan, the Transport Decarbonisation Plan, the Electric Vehicle Infrastructure Strategy and the Jet Zero Strategy. The government remains committed to publishing a Sustainable Tourism Plan in 2024.

### **Next Steps**

- The government, working with the Tourism Industry Council and the British Tourism Authority, will develop a Sustainable Tourism Plan in 2024.
- The government will continue to deliver the 25 Year Environment Strategy and has published its Environmental Improvement Plan for 2023-2028, including actions such as completing the England Coast Path and opening a new National Trail across the north of England to increase access to nature and protect our natural heritage.
- The government will continue working with all partners including through the Jet Zero Council (a partnership between government, industry and academia) to test, develop and implement the solutions needed to achieve Jet Zero.
- To support drivers to make long distance journeys, the government's Rapid Charging Fund will future-proof electrical capacity at strategic locations to prepare the network for a fully electric car and van fleet; and
- The government will continue to protect and enhance the historic environment through existing agri-environment schemes such as Countryside Stewardship and supporting the provision of electric vehicle chargepoints in homes and workplaces, including small accommodation businesses through the development of future Environmental Land Management Schemes. This will include introducing a heritage standard in the Sustainable Farming Incentive and securing a legacy for the woodland access created through the Nature for Climate Fund programme through our new Local Nature Recovery scheme.

## Objective 5: To ensure the tourism industry provides an accessible and inclusive offer that is open to all

### Overview

The government remains committed to promoting and boosting accessibility and inclusivity across the visitor economy, including the target set out in the Plan for the UK to become the most accessible tourism destination in Europe by 2025: to demonstrate UK values to the world, promote social cohesion, and maximise the value of the 'purple pound' - the spending power of people with access needs.

A recent government survey assessed participation in domestic tourism based on factors such as age, gender, religion, ethnicity, disability status and socio-economic classification.<sup>103</sup> It found, amongst other things, that 45% of people who had a long-standing illness or disability did not take an overnight holiday in England in the last year, compared to 36% of people who did not have a longstanding illness or disability. Adults in employment that indicated a higher socio-economic classification, such as higher managerial or professional occupations, were more likely to have taken a holiday in England (71%) than those in routine and manual occupations (53%) or those who had never worked or were long-term unemployed (34%). And there was a broadly negative correlation between taking a domestic holiday and deprivation, with only 45% on the lowest index of deprivation (the most deprived) taking a holiday in England in the last year, compared to 76% of those on the highest index of deprivation (the least deprived). The government is committed to further engagement with stakeholders to better understand the barriers holding back participation in tourism.

In 2022, the government in partnership with VisitEngland and Family Holidays Charity delivered 'England for Everyone', which provided over 800 free holidays for families from low socio-economic backgrounds.<sup>104</sup> The government has appointed a Disability and Accessibility Ambassador for Tourism, Ross Calladine, who will work to promote best practice, help identify ongoing barriers and contribute to strategic thinking around how to improve accessibility in the sector. The newly established Tourism Industry Council Working Group on Inclusivity and Accessibility, comprised of government and tourism industry inclusivity and accessibility representatives, will also help to drive this agenda forward. This Group - working with the D&A Ambassador and with England's Inclusive Tourism Action Group (EITAG) - will identify the areas of focus for government and industry and present recommendations to the Tourism Industry Council and the Inter-Ministerial Group for the Visitor Economy in the coming year.

### Next Steps

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<sup>103</sup> DCMS (2022), [Participation Survey: July to September 2022 publication](#)

<sup>104</sup> Family Holiday Charity, [England for Everyone](#)

- The government will continue to work with the Tourism Industry Council Working Group on Inclusivity and Accessibility, the Disability & Accessibility Ambassador, England's Inclusive Tourism Action Group (EITAG), and other stakeholders to develop our approach to accessibility and inclusion, focusing on actions to build on existing best practice and toolkits, such as the National Accessible Scheme (NAS), and examining how people are currently limited in their access to tourism services based on their protected characteristics.
- The government and Tourism Industry Council Working Group will deliver Ministerial roundtables exploring barriers to participation in tourism. Based on the evidence gathered at these roundtables, and in partnership with the Tourism Industry Council Working Group, the government will develop policy, including identifying and prioritising policy interventions and a roadmap, to deliver the ambition to become the most accessible tourism destination in Europe by 2025.
- The government will explore opportunities to increase the number of employers in the hospitality, leisure and tourism sectors signed up to Disability Confident.
- The government will continue to explore and invest in the infrastructure that supports increased accessibility and inclusion, including delivering the £30 million Changing Places Fund to increase provision of Changing Places toilets in public buildings such as hotels; delivering the Inclusive Transport Strategy; and conducting an accessibility audit of all railway stations across Great Britain.

## Objective 6: To make the UK a leading European nation for hosting business events

### Overview

The government has made good progress against the Plan's objective for business events, which is focussed on further improving the UK's reputation to attract more high-profile events here and champion UK industries on the global stage.

The sector reopened its doors in summer 2021 following the successful completion of the Events Research Programme which paved the way to safe reopening. Since then, anecdotal evidence suggests that domestic audiences have been quick to return. The government's Live Events Reinsurance Scheme provided a timely safety net for the sector during the Omicron wave, while the removal of pandemic border restrictions helped attract international events to the UK this year (though international business visitor numbers remain down on 2019, in line with wider trends).

The sector has further to go to achieve full recovery. It was recently estimated that 440,000 conferences and meetings took place in the UK in 2021: more than double the 200,000 that took place in 2020, but still less than a third of 2019's activity.<sup>105</sup> The government will continue to closely monitor the impact of inflation, energy costs and staff shortages on events businesses to ensure that the sector is able to build on its recovery to date. The UK is currently placed 6th in the International Congress and Convention Association (ICCA) rankings for business events, behind the US, Spain, Germany, France and Italy;<sup>106</sup> the government is keen to see a return to a Top 5 position in those rankings.

The government has taken important steps to provide further coordinated advocacy for business events, with strong ministerial attendance at flagship events like last November's COP26 in Glasgow, but there is further to go. DCMS and VisitBritain will continue to work across government and with industry partners to proactively attract and proudly welcome new events to UK cities, as well as to grow existing ones. The Events Industry Board has been relaunched as a Tourism Industry Council Working Group to ensure the group is used strategically and with a stronger authority to recommend practical policy options to support tourism recovery and drive this agenda forward.

This will build on the success of VisitBritain's Business Events Growth Programme (BEGP), which provided £1.2 million in support for events and event bids between 2016 and March 2022 and, following its most successful year to date, will soon hit 150 total events supported. Last financial year, for example, BEGP supported 24 international events across the UK's strongest sectors - supporting cities' visitor economies and enhancing their reputation as

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<sup>105</sup> [UK Conference and Meetings Survey Report](#) (June 2022).

<sup>106</sup> International Congress and Convention Association (4 August 2022), [ICCA announces top performing destinations for international association meetings](#)



global leaders in their target sectors. In recent years, BEGP funding has helped London host the largest ever Sibos financial services event, Leeds to welcome this year's brand new UK Real Estate Investment & Infrastructure Forum and Glasgow to win next year's Euroanaesthesia Congress (set to attract over 8,000 delegates from more than 100 countries).

Chris Skeith, CEO of UKEVENTS, said:

*“UKEVENTS enjoyed significant dialogue with DCMS throughout the pandemic, providing information, data, and insight to help navigate the challenges presented by COVID-19. Dialogue continues post pandemic, specifically with the Events Industry Board since its integration into the Tourism Industry Council as a Working Group where it is now strategically placed to promote the events sector as a driver of economic impact and a catalyst to fuel international business into the UK.*

*The sector holds the key to drive trade across every sector of the economy, in attracting new international events into the UK, but also in attracting international visitors, businesses and delegations into existing UK events. Despite various headwinds, many business events are performing well, for example trade and consumer exhibitions which are projected to match pre-pandemic levels by the end of 2023. The sector can be a significant driver of economic growth and we look forward to continued engagement with the government to ensure the sector reaches its full potential.”*

### **Next Steps**

- The government will continue to enhance the Ministerial Advocacy Programme, including increasing Ministerial attendance at business events and letters of support for event bids.
- The government will continue at appropriate fiscal moments to evaluate the case for expanding the VisitBritain Business Events Growth Programme.
- The government, working with the Tourism Industry Council Working Group, will produce a strategy for sustainable business events in line with the broader Sustainable Tourism Plan.
- The government will work to ensure the business events sector is fit for the future, including working with the sector to identify skills gaps, capacity gaps and potential improvements to accessibility.

## Overseeing and Driving Action

As noted in the introduction to this report, the mechanisms for engagement and governance within government and with industry partners has been improved and expanded in order to oversee the effective delivery of the Tourism Recovery Plan and to coordinate policy responses to the challenges and opportunities facing the visitor economy as a whole.

### Government

Within government, two new Inter-Ministerial Groups have been established:

#### **Inter-Ministerial Group (IMG) for the Visitor Economy**

The IMG, chaired by DCMS Secretary of State or Minister for Tourism, considers how policy levers across government can best support the recovery, growth and development of the UK visitor economy as a whole, including in its contribution to government objectives around levelling up, sustainability, improving productivity, inclusivity, accessibility, employment, and skills. The IMG is a crucial engagement and governance forum which ensures the coordination of post-COVID recovery plans across departments. 13 government departments attend the IMG.

#### **Inter-Ministerial Group for Tourism of the Devolved Administrations**

Tourism is a devolved responsibility of the Scottish and Welsh governments and the Northern Ireland Executive; the UK government is committed to working with the devolved administrations to improve tourism across the UK. This forum seeks to support effective engagement through the sharing of knowledge and information relating to tourism policy development. It aims to provide central coordination and promotion of greater collaboration in areas of shared interest between the respective portfolio ministers leading on tourism.

### Stakeholder Engagement

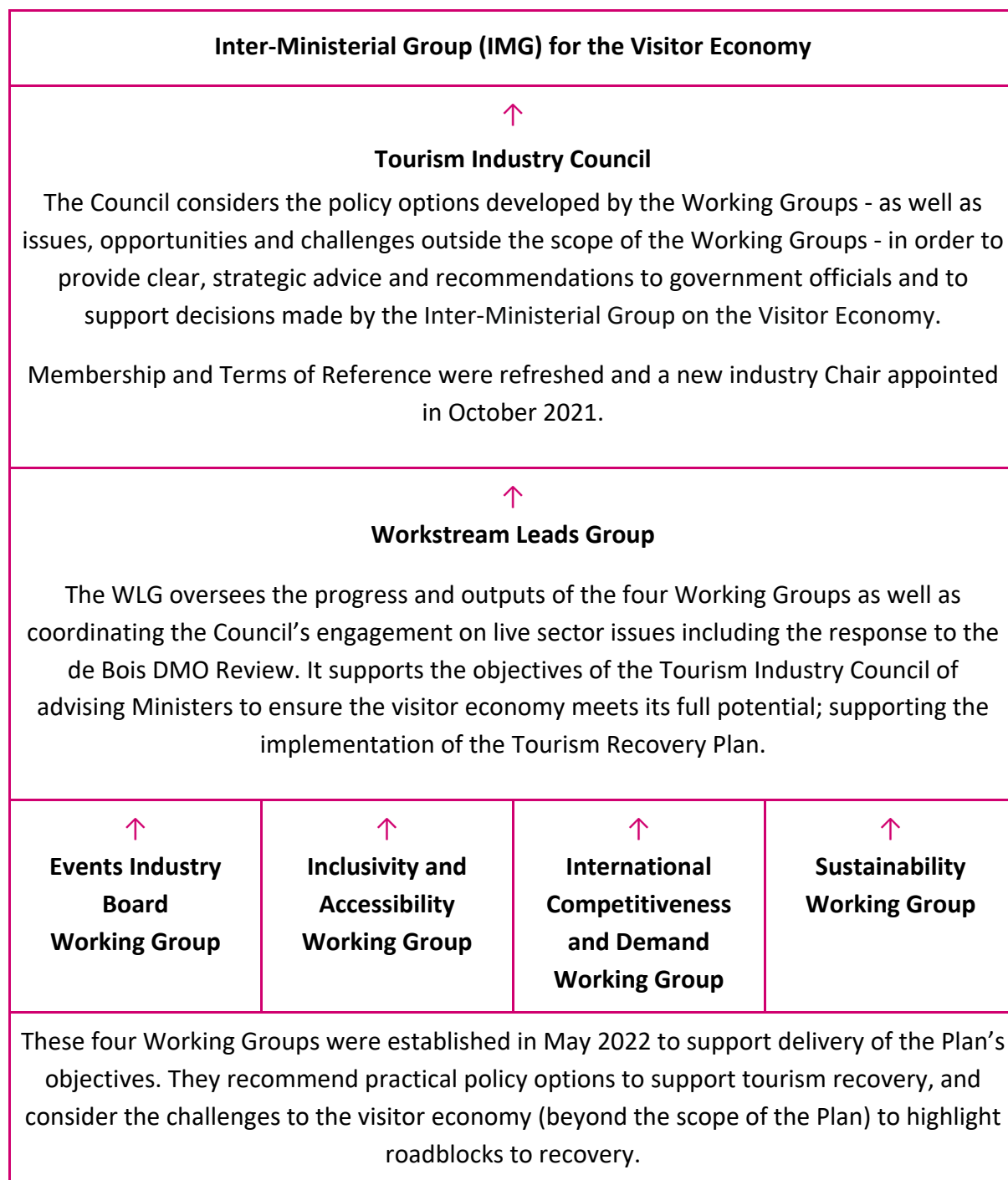
The Tourism Industry Council is a joint industry and government-led board with membership drawn from large employers, small businesses and representative organisations across the leisure and tourism industry.<sup>107</sup> The Council acts as a crucial sounding board and point of dialogue between Ministers and the industry. A strategic refresh of the Council's membership and Terms of Reference has been undertaken to ensure the group remains effective and representative of the breadth of the sector. A new industry Chair, Karin Sheppard of the InterContinental Hotels Group, has been appointed to drive the work of the Council forward,

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<sup>107</sup> [Tourism Industry Council - GOV.UK](https://www.gov.uk/government/organisations/tourism-industry-council)

and four new industry-led Working Groups have been established to take forward the Plan’s objectives on a granular level.

A Workstream Leads Group (WLG) has also been introduced and will sit above the Working Groups. Its purpose is to play an active role in developing policy advice and recommendations to feed into the Council, overseeing and coordinating the outputs of the Working Groups, and ensuring that Council itself is used strategically to the greatest effect to inform and advise the government. The WLG is composed of members that represent key short, medium- and long-term issues in the visitor economy, and includes representation from DCMS.



## Section 3 - Forward Look

Since the Plan was published in June 2021, the government has worked closely with the sector to make progress against all of the Plan's six objectives. It is vital now to build on the momentum of the achievements made against these objectives so far. There is still more that can be done against all six objectives, both in the short term to reach full recovery - especially in light of the new global economic challenges that have emerged since the Plan's publication - and in the medium to long term to build back better and create a more sustainable, dynamic, innovative and resilient sector.

The government will continue to revisit the objectives laid out in the Plan at regular intervals to ensure that the right policy interventions are in place to support the sector. In doing this, the government will continue to engage collaboratively across departments, with the devolved administrations and with industry experts through the fora that have been established or refreshed over the last year including the Inter-Ministerial Groups and the Tourism Industry Council and its Working Groups.

# Update to DCMS Select Committee on the Tourism Recovery Plan

## Annex - Further Detail on Objectives

### Objective 1: To swiftly recover pre-pandemic levels of domestic and international visitor volume and spend

DELIVERED	ON TRACK / IN PROGRESS	NEXT STEPS
<b>Reopening Safely</b>		
<ul style="list-style-type: none"> <li>● All COVID-19 restrictions were lifted as soon as it was safe to do so, with all businesses reopened by July 2021 and all border health measures lifted in March 2022, ahead of international competitors.</li> <li>● During the pandemic, the government maintained up to date guidance for businesses on how to operate safely in the 'Visitor Economy' and 'Hotels &amp; Accommodation' COVID-19 guidance throughout 2020 - 2022.</li> <li>● Maintaining presence and leadership on the global stage, the UK Government engaged with the Global Travel Taskforce and Borders and Health Measures Board, in addition to multilateral international engagement with G20 and G7.</li> <li>● VisitBritain delivered the 'We're Good to Go' campaign,</li> </ul>	Completed	Completed

DELIVERED	ON TRACK / IN PROGRESS	NEXT STEPS
<p>a UK-wide industry standard to reassure customers that businesses adhered to government and public health guidance, with 51,833 applications received.</p> <ul style="list-style-type: none"> <li>VisitBritain worked with the government to develop clear and accessible public communications via the 'Know Before You Go' scheme.</li> </ul>		
<b>Supporting Businesses</b>		
<ul style="list-style-type: none"> <li>The government provided over £37 billion of financial support to the tourism, leisure and hospitality sectors in grants, loans and tax breaks.</li> <li>In addition to the government's wider economic support package: a VAT cut for tourism and hospitality activities to 12.5% was introduced and extended until the end of March 2022; business rates relief was extended and increased from 50% to 75% in 2023-24 up to £110k per business; Restart grants of up to £18,000 were introduced; and a Recovery Loan Scheme for SMEs was introduced and extended until August 2024.</li> <li>The government provided over £1.5 billion in grants and loans to around 5000 organisations through the package of measures that comprised the Culture Recovery Fund (CRF). This included direct support for DCMS-sponsored museums and galleries, who were</li> </ul>	<ul style="list-style-type: none"> <li>The government will continue to support businesses with the costs of energy through the Energy Bills Discount Scheme, which will run from April 2023 to March 2024. Recognising that some businesses are particularly vulnerable to high energy prices, users in the 'Energy and Trade Intensive Industries' will receive a higher level of support, including museums, heritage sites and buildings and similar visitor attractions, and</li> </ul>	<ul style="list-style-type: none"> <li>The government's Autumn Statement 2022 sets out measures across business rates relief, investment, infrastructure and skills reforms which can help to deliver accelerated recovery and support the sector to achieve its growth potential.</li> <li>The government has committed to embedding tax simplification at the heart of the tax system as a core HM Treasury and HMRC priority.</li> </ul>

DELIVERED	ON TRACK / IN PROGRESS	NEXT STEPS
<p>among a number of beneficiaries across the country that are significant cultural and heritage visitor attractions.</p> <ul style="list-style-type: none"> <li>● The government has undertaken consultations on Business Rates Reform and Online Sales Tax seeking views from businesses to inform policy making.</li> <li>● The government delivered a £56 million Welcome Back Fund to help councils prepare for safe reopening across the country and particularly in coastal tourism destinations (2021).</li> <li>● The government delivered the second round of the £80 million Green Recovery Challenge Fund, supporting organisations to deliver nature-based projects that drive sustainable recovery, growth and job creation (2021)</li> <li>● The government provided support for eligible businesses through the Airport and Ground Operations Support Scheme - covering the equivalent of their business rates liabilities or COVID-19 losses - which was renewed until October 2021.</li> <li>● The government worked with the British Tourist Authority to deliver a targeted £300,000 Destination Management Company and Inbound Tour Operator</li> </ul>	<p>botanical and zoological gardens.</p> <ul style="list-style-type: none"> <li>● The government maintains no plans to introduce a Tourism Tax at this time.</li> <li>● The government will continue with regular engagement with stakeholders across the Visitor Economy through appropriate forums such as the DCMS-led Tourism Industry Council and the BEIS-led Hospitality Sector Council.</li> </ul>	<ul style="list-style-type: none"> <li>● Following a review of Air Passenger Duty (APD) as announced at Budget 2021, the government will introduce a package of APD reforms that will bolster UK air connectivity through a 50% cut in domestic APD, and further align with UK environmental objectives by adding a new ultra-long-haul distance band. These reforms will take effect from 1 April 2023. This package represents an overall tax cut to the aviation industry.</li> <li>● The government will undertake a review of Package Travel Regulations (PTRs) with a view to enabling businesses in the visitor economy to offer greater choice to consumers (2023)</li> </ul>

DELIVERED	ON TRACK / IN PROGRESS	NEXT STEPS
<p>Amplification and Distribution Fund.</p> <ul style="list-style-type: none"> <li>Government measures to combat the rising costs of energy bills, including the Energy Bill Relief Scheme which ran from October 2022 until March 2023, have supported tourism businesses as well as protected consumers from a drop in disposable income that could reduce willingness and ability to travel.</li> <li>VisitBritain delivered 'Taking England to the World' which encompassed 10 recovery webinars with 2477 participants (2021)</li> </ul>		<ul style="list-style-type: none"> <li>The government will explore the development of mitigations to the removal of the VAT-free shopping scheme.</li> </ul>
<b>Stimulating Demand</b>		
<ul style="list-style-type: none"> <li>The government, in partnership with the BTA and National Lottery, delivered the £10 million 'Days Out' campaign, which stimulated demand for more off-season day trips to tourist sites across the UK. As part of this, the public were able to redeem £25 vouchers against hundreds of attractions. The National Lottery 'Days Out' campaign saw 201,700 vouchers redeemed and £6.3m generated (Oct 2021- Mar 2022). An additional 115,551 trips were stimulated during the campaign that would otherwise not have taken place.</li> </ul>	<ul style="list-style-type: none"> <li>A new joint government and industry Tourism Industry Council Working Group on International Competitiveness and Demand has been established to recommend practical policy options to support tourism recovery. Chaired by Joss Croft, CEO of UKInbound</li> </ul>	<ul style="list-style-type: none"> <li>The government will focus on ensuring the UK's international tourism offer is as competitive - in terms of visa offer, border welcome and incentives for high-value visitors - as possible.</li> <li>The government will continue to monitor the position in relation to</li> </ul>



DELIVERED	ON TRACK / IN PROGRESS	NEXT STEPS
<ul style="list-style-type: none"> <li>● The government supported the successful delivery of events such as Her Majesty The Queen’s Platinum Jubilee (including an additional UK-wide bank holiday), the Birmingham Commonwealth Games and UNBOXED: Creativity in the UK (2022)</li> <li>● Alongside the Commonwealth Games, the government ran a £24 million Business and Tourism Programme, using the showcasing opportunity of sport to drive trade, investment and visitors to the region and the UK.</li> <li>● The government signed a Memorandum of Understanding with the Tourism Ministry of Saudi Arabia, and a Joint Declaration on Bilateral Cooperation (including a tourism strand) with Portugal. These frameworks committed the respective countries to work together on key tourism policy issues, and to share best practice on tourism policy implementation.</li> <li>● The government delivered the Great British Rail Sale, an initiative between the government and participating rail operators that offered up to 50% off some train tickets in spring 2022, with approximately 2 million journeys linked to the sale equating approximately 137 million miles of discounted journeys travelled on UK railways.</li> </ul>	<ul style="list-style-type: none"> <li>● VisitBritain is delivering their international marketing campaign, "See things differently", targeted at key GREAT markets in the EU, North America and the Gulf, to stimulate inbound demand and drive the dispersal of tourists to the nations and regions.</li> <li>● The government has created an exemption from visa requirements and the new Electronic Travel Authorization (ETA) scheme for Gulf Cooperation Council (GCC) nationals, starting in 2023, to provide a boost in international tourism numbers.</li> </ul>	<p>inbound group travel, including youth group travel.</p> <ul style="list-style-type: none"> <li>● DCMS will continue to work closely with DfT to explore opportunities to support the leisure rail sector.</li> <li>● Events across the UK will continue to draw domestic and international tourists, including HM the King’s Coronation, the Eurovision Song Contest in 2023 in Liverpool, the World Snooker Championship in Sheffield and Golf Open Championship in Liverpool in 2023, and the Women’s Rugby World Cup.</li> <li>● Bradford’s UK City of Culture tenure will begin in 2025 delivering an exciting cultural programme that will accelerate the recovery of the tourism industry, and</li> </ul>

DELIVERED	ON TRACK / IN PROGRESS	NEXT STEPS
<ul style="list-style-type: none"> <li>● The government supported the delivery of set-piece global business events to boost inbound visitor numbers and spend, including the World Travel Market.</li> <li>● VisitBritain’s £14 million international marketing campaign “Welcome to Another side of Britain” ran from February to June 2022. This first tourism campaign post-pandemic delivered a boost to the UK economy of £190 million and created more than 3500 jobs.</li> <li>● VisitEngland’s ‘Escape the Everyday’ campaign focused on attracting travellers to destinations across England. The campaign also provided £2 million for Destination Management Organisations to market their regions to domestic audiences.</li> <li>● VisitBritain expanded the remit of their ecommerce platform to cover domestic as well as international customers. Domestic travellers are now able to access a wide range of attractions and travel products tailored to the UK market (Sep 2021).</li> <li>● VisitBritain promoted various food and drink marketing campaigns (as well as cultural, natural and heritage experiences/attractions). Won Travelmole's Web Award for the US Food and Drink campaign, in partnership with ‘Food is GREAT’. VisitBritain have been working with Wine GB on a bespoke training programme,</li> </ul>		<p>help to drive regional growth.</p>

DELIVERED	ON TRACK / IN PROGRESS	NEXT STEPS
<p>focussed on maximising wine tours and cellar door sales with an aim to roll this out more widely to food and drink businesses.</p> <ul style="list-style-type: none"> <li>● VisitBritain delivered ExploreGB Virtual, bringing together UK travel trade suppliers with buyers from over 30 markets (2022).</li> <li>● As UK City of Culture 2021, Coventry delivered an exciting year-long programme of cultural events and activities which drew in visitors from across the UK, boosted investment and inspired pride of place. There were over 700 events held throughout the year and 123 direct jobs were created for the delivery of the programme. There was £172.6 million investment secured into the city as a result of Coventry being awarded the UK City of Culture.</li> </ul>		

**Objective 2: To ensure that tourism benefits every nation and region**

DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
<b>Growth in every nation and region</b>		
<ul style="list-style-type: none"> <li>● The government developed the £4.8 billion Levelling Up Fund, which is investing in infrastructure that improves everyday life across the UK. The Round 2 prospectus made specific reference to the Visitor Economy to attract bids from the sector, and provided funding for visitor economy projects such as Eden Project North and the regeneration of Gateshead Quays and the Sage as well as £594 million to restore local heritage sites and £672 million to improve transport links.</li> <li>● The government awarded six Growth Deals to support the Visitor Economy, with an estimated value of £467.5 million (2021 and 2022)</li> <li>● The government delivered the £3.6 billion Towns Fund, providing capital funding for 101 towns to develop innovative solutions that levelled up their local economies, including the £1 billion Future High Streets Fund (2021)</li> </ul>	<ul style="list-style-type: none"> <li>● The government will continue to deliver the Levelling Up Fund, which will invest in infrastructure across the UK until 2024-25.</li> <li>● The government will continue to deliver the £2.6 billion UK Shared Prosperity Fund (UKSPF) between 2022 - 2025 to empower investment in local priorities such as: building pride in place, supporting high quality skills training, supporting pay, employment and productivity growth and increasing life chances.</li> <li>● The government will continue to deliver Devolution Deals as proposed in the Levelling Up White Paper, providing greater freedoms and flexibilities at a local level, meaning councils can work more effectively to improve the Visitor</li> </ul>	<ul style="list-style-type: none"> <li>● The government will work with VisitEngland to implement recommendations from the DMO Review including introducing a new accreditation system in 2023 and piloting the Destination Development Partnership multi-year core funding model in the North East of England.</li> <li>● The government and the BTA will continue to explore the potential to expand some Discover England Fund projects beyond the English borders into Scotland, Wales and Northern Ireland.</li> <li>● The Rural England Prosperity Fund will provide up to £110 million to eligible rural local authorities between April 2023 and March 2025. It will fund</li> </ul>

DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
<ul style="list-style-type: none"> <li>● The government delivered the £220 million UK Community Renewal Fund. This Fund supported people and communities most in need across the UK to pilot programmes and new approaches and invested in skills, community and place, local business, and supported people into employment (2021)</li> <li>● The government supported the publication of the independent Nick de Bois Destination Management Organisation (DMO) Review (2021) and published HMG's response to the DMO Review supporting recommendations to improve the structure and coherence of the DMO landscape (2022)</li> <li>● The government delivered a North East 'Policy Sprint', exploring how national and local government, regional partners and the private sector can support the Visitor Economy at a regional level (2022)</li> <li>● DfT published an Aviation Strategy entitled 'Flightpath to the Future' in May 2022. This sets out a vision for delivering a modern, innovative and efficient aviation sector of the future, focused on the next ten years. It includes a ten-point plan and the</li> </ul>	<p>Economy in their area. The Devolution Deal already agreed for York and North Yorkshire sees the government explicitly commit to working with the newly established combined authority to explore the best structures and geographies for future Destination Management and Marketing interventions.</p> <ul style="list-style-type: none"> <li>● In line with the High Streets Strategy and the Hospitality Strategy, the government will work with local authorities and local businesses to develop hospitality-led regeneration hubs - with demonstrators delivered in every nation of the UK - that will create unique regional offers to attract visitors and create opportunities for local people.</li> <li>● The Government is investing over £35 billion in rail between 2022/23 and 2024/25 including High Speed Rail Two, rail enhancements and vital renewals to boost connectivity</li> </ul>	<p>capital projects for small businesses and community infrastructure which will help to improve productivity and strengthen the rural economy and rural communities. Investment will be based on local priorities and support a range of projects which could include grants for converting farm buildings to other business uses, and rural tourism such as investments in visitor accommodation.</p> <ul style="list-style-type: none"> <li>● The government will work with stakeholders to emphasise the accessible and flexible nature of coaches, and how they can support the sector's recovery. The government will also explore with stakeholders including tourism bodies opportunities to promote the use of coaches, and facilitate and improve coach access -</li> </ul>

DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
<p>establishment of an Aviation Council – bringing together the Minister for Aviation and CEOs from across the industry – to implement the commitments set out in the Flightpath.</p> <ul style="list-style-type: none"> <li>● DfT published the Maritime Recovery Route Map which sets out government and industry’s priorities, covering the Maritime 2050 themes of environment, technology and innovation, infrastructure and importantly people and skills. Industry and government continue to work together to support the recovery of the sector and the coastal communities it supports.</li> <li>● The government published Sir Peter Hendy’s final report of the Union Connectivity Review (Hendy Review) on November 26, 2021 alongside a commitment by the former Prime Minister to forge and strengthen transport bonds that will create a more cohesive and connected United Kingdom, increasing access to social and economic opportunities for all UK communities.</li> <li>● Defra’s 2022 Regional Food and Drink Summit brought together 120 SMEs to learn</li> </ul>	<p>across the country – focusing on the Midlands and the North</p> <ul style="list-style-type: none"> <li>● The government is investing £3 billion on buses this Parliament, including over £1 billion to deliver improvements to bus services throughout England, including in areas such as Cornwall and Brighton, to help deliver the bold vision for bus services set out in the National Bus Strategy and to support visitors to travel in a more sustainable way.</li> <li>● The government will invest up to £135 million to cap single bus tickets at £2 on most routes in England outside London from 1 January to 30 June 2023 to help passengers save on regular travel costs and increase bus usage.</li> <li>● The government is carefully considering the 19 recommendations of the Hendy Review on Union Connectivity and is continually engaging with</li> </ul>	<p>including parking - to tourist destinations.</p> <ul style="list-style-type: none"> <li>● The government will consider ways to support the development of the country’s food and drink tourism offer, raising domestic and international awareness of the wealth and variety of unique local food cultures across the country. Through strong links to regional food and drink organisations across the UK, Defra is looking at ways to support food groups and SMEs to develop regional food identities, to increase public awareness of the Geographical Indication (GI) concept (where a sign is used on products that have a specific geographical origin and possess qualities or a reputation that are due to that origin) and of GI products to contribute to pride of place and</li> </ul>

DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
<p>from best practice and design their own action plans. Regions with a strong food and drink identity, especially those that are home to prominent food and drink products (including those accredited under the UK geographical indication scheme), help to drive both domestic and international tourism.</p>	<p>stakeholders across the UK to seek views on how the recommendations can be taken forward to strengthen transport connectivity for the benefit of all parts of the UK. The government aims to publish a full response to the review as soon as practical.</p> <ul style="list-style-type: none"> <li>● VisitBritain’s new Gateway Innovation Fund is providing grants to deliver international marketing activity for a specific inbound gateway or region, showcasing the best of what the UK has to offer and motivating international travellers to explore the UK in 2023.</li> <li>● The Local Government Association will continue to support local councils across the country by providing Leadership Essentials training and improvement support, including piloting training specifically for local council officials supporting and promoting their local visitor economy.</li> </ul>	<p>strengthen links between food promotion and tourism.</p>

**Objective 3: To build back better with a more productive, innovative and resilient tourism industry.**

DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
<b>Innovation and Resilience</b>		
<ul style="list-style-type: none"> <li>● The government published a Call for Evidence in June 2022 on developing a Tourist Accommodation Registration Scheme in England, which closed in September 2022 and received almost 4,000 responses. Based on the findings of the Call for Evidence, the government introduced legislation for a registration scheme for short-term lets through the Levelling Up and Regeneration Bill.</li> <li>● Government and industry jointly delivered the £200m 5G Testbeds and Trials (5GTT) Programme, as part of which seven tourism projects across the UK were awarded a total of £22.9m.</li> <li>● Government schemes such as ‘Help to Grow: Digital’ were also put in place to upskill businesses, and the Digital Boost platform has already helped 300 tourism businesses to build their digital capability.</li> </ul>	<ul style="list-style-type: none"> <li>● The government is exploring how Electronic Travel Authorisation (ETA) data and UK Visas and Immigration (UKVI) commercial platforms can support tourism.</li> <li>● Work is underway to improve the British Tourism Authority’s digital capabilities via their Transformation Programme, which will build a completely new approach to using technology and releasing the value of data. This will include everything from improving data storage and management to leveraging the best technology to make accessible actionable insights, from automating and analysing data to innovative product development that supports the sector.</li> </ul>	<ul style="list-style-type: none"> <li>● Based on the outcomes of the Call for Evidence on a Tourist Accommodation Registration Scheme in England, the government will publish a public consultation exploring the details of how a registration scheme for short-term lets will operate in England.</li> <li>● The government and British Tourism Authority will explore the development of a Tourism Data Hub at an appropriate future date.</li> <li>● The government will deliver the 2025 UK Border Strategy, which aims to deliver a world class border that will make travellers’</li> </ul>



DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
	<ul style="list-style-type: none"> <li data-bbox="1016 284 1525 1219">● In December 2022, DSIT launched its first Alpha Trials to test new low-latency Low Earth Orbit (LEO) satellite connectivity to some of the UK's most remote areas as part of the government's plans to ensure everyone can access fast and reliable coverage. Those sites set to benefit include Rievaulx Abbey in the North Yorkshire Moors National Park, where improved connectivity will enhance the visitor experience by helping people to better engage with the educational content relating to the ancient monument; and a Scouts Cymru-managed camping site and outdoor activity centre in Crafnant Valley, where improved connectivity will help improve safety for visitors traversing the site as well as enabling new educational resources for visiting groups.</li> </ul>	<p data-bbox="1653 284 1962 352">journeys smoother and more secure.</p>

DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
<b>Skills and Labour</b>		
<ul style="list-style-type: none"> <li>● The government established the Hospitality &amp; Tourism Skills Board to address the needs of the Visitor Economy and the wider hospitality sector.</li> <li>● The government updated the International Education Strategy, renewing a commitment to support the UK's education sector to attract international students thereby furthering the nation's soft power, increasing education exports, and building a network of alumni who would return to the UK to visit, live and/or do business. The Strategy also recognises the crucial contribution of English Language Training to the UK's global potential and the need to support and promote the UK's English Language Training sector.</li> <li>● The government delivered the Help to Grow: Management scheme to upskill 30,000 small and medium size enterprises in the UK over three years.</li> <li>● The government supported the creation of the Digital Boost platform, providing free advice and support for small businesses across all sectors to</li> </ul>	<ul style="list-style-type: none"> <li>● The government will continue to work towards the Plan for Jobs, including through the framework of the Skills for Jobs White Paper which sets out the government's vision for how post-16 technical education and training can help support people to develop the skills needed to get good jobs and improve national productivity.</li> <li>● The government is investing £2.5 billion in the National Skills Fund until 2025, to help people gain skills to improve their job prospects, including in sectors such as hospitality. A consultation on this Fund was held in 2022 to ensure it is fit for purpose and delivering the most effective results across the economy.</li> <li>● Apprenticeships in hospitality and catering will be showcased as part</li> </ul>	<ul style="list-style-type: none"> <li>● The Hospitality &amp; Tourism Skills Board will continue to pursue an employer-led, coordinated and proactive approach towards recruitment, retention and upskilling, including by developing innovative new recruitment campaigns such as Hospitality Rising, developing skills and training, and working closely with government partners.</li> <li>● The government is undertaking a thorough review of the issues holding back workforce participation.</li> </ul>

DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
<p>build their digital capability, which has supported 300 businesses in the tourism sector.</p> <ul style="list-style-type: none"> <li>● The government put in place various measures aimed at getting people back into employment, including schemes to support a growth in apprenticeships and traineeships (including incentive payments for employers), and a national Kickstart programme focussed on supporting 16 to 24-year-olds on Universal Credit to gain skills and experience.</li> <li>● In January 2022, the government launched the Way to Work campaign to move job-ready welfare claimants into work. This drive helped over 500,000 jobseekers into work, many taking on roles in new sectors, and saw many employers recruiting through job centres for the first time.</li> <li>● The government amended the law to allow prisoners at open prisons to apply for high quality apprenticeship roles in industries such as hospitality and cheffing, not only rehabilitating offenders but also plugging skills gaps in these sectors.</li> </ul>	<p>of the government’s Career Starter Apprenticeship campaign</p> <ul style="list-style-type: none"> <li>● The government has expanded Sector-based Work Academy Programmes (SWAPs) which support benefit claimants to learn the skills that employers in particular industries such as hospitality are looking for and is aiming to deliver a further 80,000 starts to SWAP in 2022/23 and is aiming to deliver a further 80,000 starts to SWAP in 2022/23</li> <li>● The government is progressing Youth Mobility Scheme (YMS) arrangements with countries inside and outside the EU.</li> </ul>	

**Objective 4: To ensure the tourism industry contributes to the enhancement and conservation of the country’s cultural, natural and historic heritage and minimises damage to the environment**

DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
<b>Sustainability</b>		
<ul style="list-style-type: none"> <li>● The government delivered £67 million in capital funding through Heritage Stimulus Fund and NLHF Kickstarter funds. The funds supported hundreds of maintenance and restoration projects, many of which had been delayed by the pandemic (2020-21).</li> <li>● The government delivered the ‘Delivering for Rural England’ Report and the Glover Landscapes Review, which recommended that National Parks and Areas of Outstanding National Beauty (AONB) should become leaders in</li> </ul>	<ul style="list-style-type: none"> <li>● The government is investing £950 million in a network of electric vehicle charging hubs at every service station on England’s motorways and major A-roads.</li> <li>● The government is supporting the provision of electric vehicle chargepoints in domestic properties and workplaces, including small accommodation businesses alongside providing funding to local authorities through the Local EV Infrastructure Fund to transform the availability of charging for drivers in England without off-street parking. The government has expended the Local Electric Vehicle Infrastructure (LEVI) Pilot funding to an additional sixteen local authorities. This extension commits nearly £22 million to deliver 2,400 EV chargepoints and 600 gullies. This is supported by nearly £17 million in private investment plus £2 million from wider local authority funds. In</li> </ul>	<ul style="list-style-type: none"> <li>● The government, working with the Tourism Industry Council and the British Tourism Authority will develop a Sustainable Tourism Plan in 2024.</li> <li>● The government will continue working with all partners including through the Jet Zero Council (partnership between government, industry and academia) to test, develop and implement the solutions needed to achieve Jet Zero.</li> <li>● The government will continue to deliver the 25 Year Environment Strategy and has published its Environmental Improvement Plan for 2023-2028, including actions such as completing the England Coast Path and opening a new National Trail across the north of England to increase access to nature and protect our natural heritage.</li> </ul>

DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
<p>sustainable tourism, by working together with Destination Management Organisations, Local Authorities, Local Enterprise Partnerships, and local businesses (2022)</p> <ul style="list-style-type: none"> <li>● The government published the Electric Vehicle Infrastructure Strategy</li> <li>● The £8m Traditional Farm Building Restoration project delivered via Historic England restored 126 historical buildings in selected National Parks, benefiting the heritage and beauty of our protected landscapes and supporting the visitor economy of our national parks.</li> </ul>	<p>addition, the government has launched the £8 million LEVI Capability Fund, which will equip local authorities with the skills and ambition to scale up their plans around EV charging strategies.</p> <ul style="list-style-type: none"> <li>● The government will lay legislation that will consider the outcomes of the government response to improve the consumer experience at public EV chargepoints including regulating to simplify payment methods, ensuring reliability and mandating open data.</li> <li>● The government is investing £7 million to complete the England Coast Path and Coast-to-Coast National Trail.</li> <li>● The government is delivering the Transport Decarbonisation Plan, outlining credible and ambitious pathways to deliver transport’s contribution to carbon budgets and meet net zero by 2050.</li> <li>● The government is delivering the Jet Zero Strategy, published in 2022 and setting out the Department for Transport’s approach for</li> </ul>	<ul style="list-style-type: none"> <li>● The government will invest £4.4 million in England's National Parks, in recognition of the vital role that these Parks play in conserving wildlife and natural heritage and the important role they play in tourism and regional economies. This funding will be used by National Park Authorities to support and protect these vital national assets, through activity such as improving visitor centres, creating new trails, or supporting access and engagement programmes.</li> <li>● The government will continue to protect and enhance the historic environment through existing agri-environment schemes such as Countryside Stewardship and through the development of future Environmental Land Management Schemes. This will include introducing a heritage standard in the Sustainable Farming Incentive and securing a legacy for woodland access created through the Nature for Climate Fund programme of the Local Nature Recovery scheme.</li> </ul>

DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
	<p>the aviation sector to reach net zero by 2050.</p> <ul style="list-style-type: none"> <li>● The Farming in Protected Landscapes scheme, currently delivered across 10 National Parks and 34 Areas of Outstanding Natural Beauty (AONBs) since 2021, will also be extended until March 2025. This will help National Parks and AONBs to continue delivering positive outcomes for nature, climate, people and place.</li> <li>● A new Tourism Industry Council Working Group on Sustainability has been established to recommend practical policy options to support tourism recovery. Chaired by Patricia Yates, CEO of the BTA.</li> </ul>	

**Objective 5: To ensure the tourism industry provides an accessible and inclusive offer that is open to all**

DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
<b>Inclusivity</b>		
<ul style="list-style-type: none"> <li>● The government delivered an initiative in partnership with Family Holidays Charity and VisitEngland, ‘England for Everyone’, which provided free holidays for families from low socio-economic backgrounds (May 2022)</li> <li>● The government has appointed a Disability &amp; Accessibility Ambassador for Tourism - Ross Calladine, VisitEngland, Host of England’s Inclusive Tourism Action Group (Jan 2022)</li> <li>● As of the end of September 2022 there were 2,464 employers from the hospitality, leisure and tourism sectors as members of the Disability Confident scheme.</li> <li>● VisitEngland allocated up to £170k from its core grant in aid to accessible tourism in the 2022/23 financial year.</li> </ul>	<ul style="list-style-type: none"> <li>● The government is delivering the £30 million Changing Places Fund to increase provision of Changing Places toilets in public buildings including hotels.</li> <li>● The government is continuing to deliver the Inclusive Transport Strategy.</li> <li>● The Department will finish delivering an accessibility audit of all 2,573 stations across Great Britain at the end of March 2023. Once the data has been quality assured, it will be passed on to GBRTT who will develop a solution to share the audit data with the public.</li> <li>● A new Tourism Industry Council Working Group on Inclusivity and Accessibility has been established to recommend</li> </ul>	<ul style="list-style-type: none"> <li>● The government will continue to work with the Tourism Industry Council Working Group, the Disability &amp; Accessibility Ambassador, England’s Inclusive Tourism Action Group (EITAG), and other stakeholders to develop our approach to accessibility and inclusion, focusing on actions to build on existing best practice and toolkits, such as the National Accessible Scheme (NAS).</li> <li>● The government and Tourism Industry Council Working Group will deliver Ministerial roundtables exploring barriers to participation in tourism. Based on the evidence gathered at these roundtables, and in partnership with the Tourism Industry Council Working Group, the government will develop policy, including identifying and prioritising policy interventions and a roadmap, to deliver the</li> </ul>

DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
<ul style="list-style-type: none"> <li>The government co-sponsored a British Standards Institution Publicly Available Standard (PAS 1899) alongside national disability charity Motability to provide specifications on the designing and installing accessible public EV charge points. PAS 1899 was published in October 2022.</li> </ul>	<p>practical policy options to support tourism recovery. Kate Nicholls (CEO UK Hospitality) has been appointed as Chair of the group. Kate is the Department for Business and Industrial Strategy's (BEIS) first ever Disability and Access Ambassador for the hospitality sector and will therefore bring her experience and network to the role and prevent duplicate work with BEIS.</p>	<p>ambition to become the most accessible tourism destination in Europe by 2025.</p> <ul style="list-style-type: none"> <li>The government will explore opportunities to increase the number of employers in the hospitality, leisure and tourism sectors signed up to Disability Confident.</li> </ul>



## Objective 6: To make the UK a leading European nation for hosting business events

DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
<b>Supporting business events</b>		
<ul style="list-style-type: none"> <li>● The government provided targeted ministerial advocacy in support of valuable international business events (2021 and 2022)</li> <li>● The government boosted confidence in bookings and attendance at trade shows, conferences and exhibitions through the Live Events Reinsurance Scheme (Sept 2022).</li> <li>● VisitBritain’s Business Events Growth Programme (BEGP) provided £1.2 million in support for events and event bids between 2016 and March 2022. Last financial year, the BEGP supported 24 international events across the UK’s strongest sectors - supporting cities’ visitor economies and enhancing their reputation as global leaders in their target sectors.</li> <li>● VisitBritain’s Domestic Support Fund awarded a total of £200,000 to 29 UK events.</li> <li>● The government invested in events infrastructure via the ‘broadband competition’ to improve connectivity in events venues (first grants were delivered to successful applicants in 2022)</li> </ul>	<ul style="list-style-type: none"> <li>● The government will continue to enhance the Ministerial Advocacy Programme, including increasing Ministerial attendance at business events and letters of support for event bids.</li> <li>● The government will continue at appropriate fiscal moments to evaluate the case for expanding the VisitBritain Business Events Growth Programme.</li> </ul>	<ul style="list-style-type: none"> <li>● The government, working with the Tourism Industry Council Working Group, will produce a strategy for sustainable business events in line with the broader Sustainable Tourism Plan.</li> <li>● The government will work to ensure the business events sector is fit for the future, including working with the sector to identify skills gaps, capacity gaps and gaps in venue provision.</li> <li>● The government will work with the sector to Identify improvements to accessibility.</li> <li>● The government will work with GREAT &amp; VisitBritain to designate Events Ambassadors.</li> </ul>

DELIVERED	ON TRACK / IN PROGRESS	FUTURE DELIVERY
<ul style="list-style-type: none"> <li>● The Events Industry Board has been relaunched as a Tourism Industry Council Working Group to ensure the group is used strategically and with a stronger authority to recommend practical policy options to support tourism recovery and drive this agenda forward (Feb 2022)</li> <li>● VisitBritain held flagship virtual business events, MeetGB and ExploreGB, to showcase UK venues, destinations and suppliers and build their connections with international partners.</li> <li>● VisitBritain published a series of resources to support UK destinations in their strategic decision-making and business development activities. This included UK sector toolkits to enhance destinations' bids for international events, as well as guides to embed legacy and wider societal impact strategies into event design.</li> </ul>		