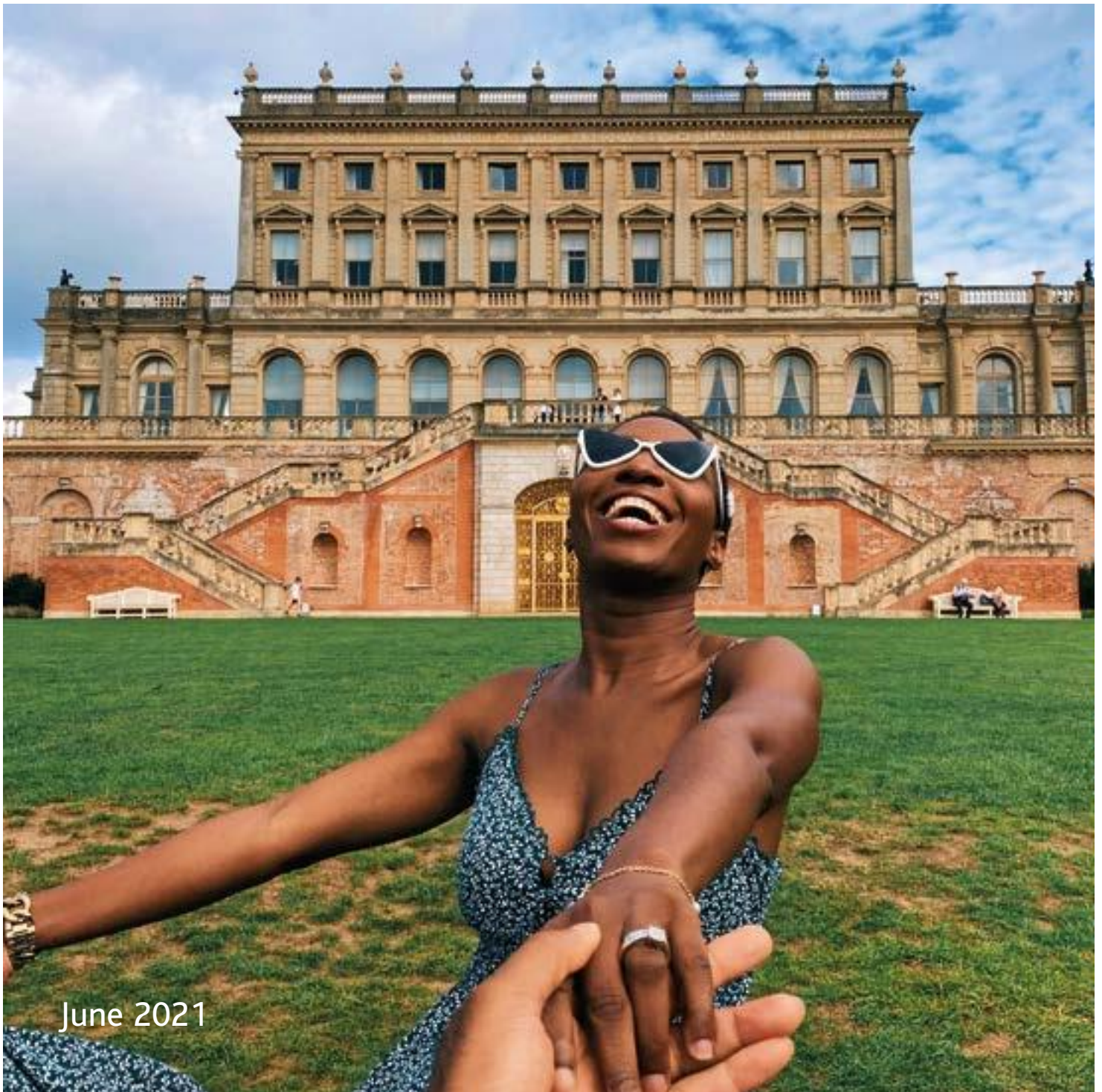




Department for
Digital, Culture,
Media & Sport

The Tourism Recovery Plan



June 2021

Executive Summary

1. In November 2020, as part of the first Global Travel Taskforce report,¹ the UK government made a commitment to bring forward a Tourism Recovery Plan in 2021. This commitment was reiterated in the Prime Minister's Spring Reopening Roadmap published in February.²
2. Tourism is an economic, social and cultural asset. The sector is a major contributor to jobs and growth in the UK, indirectly employing 4 million people and making a direct economic contribution of £75 billion a year pre-pandemic.³ The sector connects people to the UK's history, showcases the UK's innovation, and will have a key role to play in reviving the spirits of the nation as the country emerges from the pandemic.
3. The commitment to produce a Recovery Plan arose from the simple fact that tourism has been one of the hardest hit sectors of the UK economy by COVID-19. Tourism is a sector that relies on the mass movement and mixing of people, two of the factors most likely to spread the virus, and as such has been heavily affected by the necessary restrictions put in place to control the pandemic.
4. The UK government acted swiftly throughout the pandemic, providing a range of both targeted and pan-economic support measures to protect jobs and businesses across the tourism industry. Over £25 billion has been provided so far to the tourism, leisure and hospitality sectors in the form of grants, loans and tax breaks,⁴ and tourism has been one of the most reliant economic sectors on measures like the furlough scheme.⁵ Taken together, government support has helped ensure the majority of the sector will be there to welcome visitors once again as the economy reopens.
5. However, Oxford Economics does not predict tourism in the UK to return in full to 2019 levels of volume and expenditure until 2025.⁶ There are a wide range of factors influencing this, such as the pace of vaccine rollout in inbound markets, the impact of social distancing on capacity, the impact of the pandemic on consumers' discretionary spending power, the threat of potential variants of concern emerging and lingering doubts amongst consumers about their own safety when travelling. Nevertheless, these forecasts are simply not quick enough for a sector with so much to offer.
6. This Tourism Recovery Plan sets out the role that the UK government will play in assisting and accelerating the tourism sector's recovery from COVID-19. It also sets out a framework for how the government will work with the sector to build back better.
7. Looking ahead, the UK government wants to see a growing, dynamic, sustainable and world-leading tourism sector reaching its full potential and driving growth across all parts of the UK. Specifically, the aim is to:

¹ Department for Transport. Report of the Global Travel Taskforce. 24 November 2020.

² Cabinet Office. COVID-19 Response – Spring 2021. 22 February 2021.

³ Office for National Statistics. Tourism Satellite Account. November 2020.

⁴ Department for Digital, Culture, Media and Sport estimate, based on published data from the Office for National Statistics. Includes Coronavirus Job Retention Scheme, Bounceback and other loan schemes, the VAT cut, the Culture Recovery Fund, the Self Employment Income Support Scheme and Eat Out to Help Out.

⁵ Office for National Statistics. BICs survey Wave 27. April 2021.

⁶ Oxford Economics – published alongside the Tourism Recovery Plan.

- Recover domestic overnight trip volume and spend to 2019 levels by the end of 2022, and inbound visitor numbers and spend by the end of 2023 – both at least a year faster than independent forecasts predict.
 - Ensure that the sector's recovery benefits every nation and region, with visitors staying longer, growing accommodation occupancy rates in the off-season and high levels of investment in tourism products and transport infrastructure.
 - Build back better with a more innovative and resilient industry, maximising the potential for technology and data to enhance the visitor experience and employing more UK nationals in year-round quality jobs.
 - Ensure the tourism sector contributes to the enhancement and conservation of the country's cultural, natural and historic heritage, minimises damage to the environment and is inclusive and accessible to all.
 - Return the UK swiftly to its pre-pandemic position as a leading European destination for hosting business events.
8. In the short term, these objectives will be achieved by getting the tourism sector reopened safely and providing businesses with the support they need to return back to profit. For example, the government has allocated at least £19 million to domestic and international marketing activity, with a £5.5 million domestic campaign already underway. Measures such as the VAT cut for tourism and hospitality, and a continuation of business rates relief for eligible properties will continue supporting businesses with cash flow, and new proposals set out in this Plan such as the introduction of a domestic tourism rail product and a voucher scheme run by the National Lottery, will help stimulate demand. There is a particular focus in the Plan on maximising the set piece events scheduled for 2022; Her Majesty's Platinum Jubilee, the Festival UK* 2022⁷ and the Commonwealth Games will all act as major domestic and international tourist draws.
9. Once restrictions are lifted, the government will focus on building back better. For example, the Plan lays out significant levels of UK-wide investment already underway in tourism product and infrastructure, as well as new support due to come in over subsequent years, such as the £4.8 billion Levelling-Up Fund. A root and branch independent review led by Nick de Bois, assessing how best to structure and support tourism at a regional level is also underway, having been launched in March. Other measures, such as an expanded advocacy and ambassadorial programme for business events, are also set out.
10. The Plan will be delivered in close partnership with the tourism sector and the devolved administrations and will take a whole of government approach. Mechanisms are being put in place to revisit the Plan at regular intervals, including a new inter-Ministerial group for Tourism, chaired by the Secretary of State for Digital, Culture, Media and Sport and supported by the Minister for Tourism.
11. This Plan represents an important milestone in the recovery of the tourism sector from this pandemic. It will ensure the tourism sector is well placed to reach its full potential and contribute to the UK government's ambitious overall plan for growth.

⁷ A working title.

Chapter 1: The Framework

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

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

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

