

# Let's Shape the Future.

Working in partnership to reconstruct a resilient future for the visitor economy in Wales.



Llywodraeth Cymru  
Welsh Government



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# Delivering Together.

## This plan is for all of us.

Visit Wales is the team within Welsh Government that is responsible for the development and promotion of the visitor economy in Wales. Our role is to support and enable partners to grow our sector for the future.

While this plan has been produced by Visit Wales, we are just one of a number of partners with a part to play in delivering these goals. This plan is based on a framework of essential themes, around which short to medium-term interventions will be developed to support the recovery of the sector. It sets out clearly the priorities for reconstructing a resilient future for tourism, hospitality and events businesses across Wales.

## Taking this plan forward.

To underpin governance and drive forward delivery of the outline interventions covered in this plan, it is recommended that a new task & finish group is established. It is proposed that this group oversees the development of an accompanying Action Plan that will act as a living document, providing more detail around the interventions and addressing the 'who' and 'how' these will be delivered. The Action Plan will be updated on an ongoing basis and will continue to evolve in line with the pace of recovery of areas of the sector, and in the context of scientific evidence and government advice. This proposed task & finish group will play an important role in ensuring frequent engagement and communication with key stakeholders around delivery of the plan: from Welsh Ministers and Welsh Government officials, to stakeholder partners, industry bodies, unions and businesses.

## Welsh Government.

This Welsh Government is on the side of people in Wales. We are striving for a more prosperous, equal and greener nation. A more prosperous Wales means creating a thriving, socially-just economy, which benefits everyone fairly and tackles the causes of poverty.

An equal Wales means delivering better public services, helping everyone who needs them, when they need them, where they need them.

A greener Wales means creating a truly sustainable nation, where resources are managed for the common good, and protected for the future. It means harnessing the power of Wales' natural environment and exploiting the potential of new technologies.

We will use all of our devolved powers to make our nation flourish. And we will unleash the talents of everyone in Wales so that we thrive together. This government will make decisions in the interests of all people, in all parts of Wales, for this and for future generations.

Rydym yn adeiladu Cymru fel gwlad hyderus ac agored, gyda diwylliant cryf, dwyieithog a chroesawgar.

We will use every day we have, and every lever we have, to make Wales a more equal, fair and just society.

# Engaging the sector.

As part of Welsh Government and custodian of the Cymru Wales nation brand, Visit Wales works closely with other areas of its Culture, Sport and Tourism group, and more broadly across Welsh Government to help grow the visitor economy for the good of Wales. But we also depend on tourism and hospitality businesses, local authorities, trade bodies and other stakeholders to work with us to grow this sector.

As such, we have not developed this plan alone. It has been informed by wide-ranging conversations with the industry. Throughout the pandemic, strong communication channels have been forged between Welsh Government and stakeholders representing the sector – and more broadly, between local governments, business networks and surrounding communities.

In particular, the [Tourism Taskforce](#) and Hospitality Stakeholder Group, formed as short life COVID-19 working groups to provide independent recommendations for Welsh Ministers, play an important role in ensuring open channels of communication between Government and the industry.

A number of other groups have also been instrumental in shaping this plan, from the [Regional Tourism Fora](#), Event Wales Industry Advisory Group, the Business Events, Travel Trade Stakeholders, and Wedding Stakeholder Group.

Although the visitor economy in Wales is a wholly devolved area, VisitBritain and the UK Government will play an important role in working with us to deliver this recovery plan. It will also be important for the visitor economy to remain high on the agenda of the new political administration.

This plan acts as a bridge towards our strategic plan for the future: '[Welcome to Wales: Priorities for the visitor economy 2020-2025](#)'. Although it was published in February 2020, shortly before Wales went into national lockdown, it still provides a long-term sense of direction, setting out priorities and actions that will become increasingly relevant as the tourism industry bounces back.



Given the uncertain path to recovery for the industry, this plan will evolve. We must maintain on-going dialogue with our partners – and actively listen to our visitors and stakeholders.

# Introduction.

## **Croeso.**

The visitor economy in Wales has been severely affected by the COVID-19 pandemic. Our tourism, hospitality and events businesses have faced extreme challenges from the start. Restrictions to stop the spread of coronavirus have meant that usually bustling hotels, wedding venues, caravan parks, bars, cafes, restaurants, visitor attractions, major events and business supply chains that stretch from the mountains of Snowdonia to the sandy shorelines of the Gower Peninsula have suffered devastating losses to custom and anticipated income.

Despite extensive Welsh Government and UK Government financial interventions, the recovery of this sector is not going to be easy. Many businesses will be struggling; low on cash, needing to restock, facing critical supply chain problems, reduced staff numbers and low in confidence – but there is cause for hope. This is our opportunity to tackle many of the long-standing barriers to the industry such as seasonality, staff shortages and skills. It is our ambition to help business owners, those employed in the sector and local communities that rely on the visitor economy to flourish once more.

A careful balance and responsible tourism will be core to this – working with local communities and destination partners is crucial as we look to rebuild the sector, allowing locals and visitors to coexist and ensure the Welsh welcome is at the heart of the visitor experience.

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# The importance of our sector to the new economy.

From outstanding areas of natural beauty to vibrant cultures and a rich heritage, the visitor economy in Wales is vital. It creates jobs and boosts local economies, providing vital employment within tourism, hospitality and events sectors, and also across a range of other sectors and supply chains. It also plays an important role in supporting local communities and improving the health and wellbeing of visitors. Our industry enriches lives – and influences how Wales is perceived across the world.

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## Economy.

11.8% of the workforce in Wales is employed in tourism. Prior to the pandemic, it was one of the country's fastest growing industries. Tourism benefits many rural Welsh-speaking areas as the main driver of the economy and source of employment. Tourism employs higher proportions of underrepresented groups such as Black, Asian and Minority Ethnic workers than average.

The new '*Economic Recovery & Reconstruction Mission*' focuses on an important route to Welsh economic recovery, building on the foundations of '*Prosperity for All: The Economic Action Plan*'. Tourism has a significant role to play in supporting the delivery of these plans.

Our industry will also play a key role in delivering the *International Strategy for Wales*. As global markets reopen, the sector has the chance to influence and project Wales' reputation around the world as a country of beauty, vibrancy and resilience.

## Places and communities.

At the heart of rebuilding the industry are its people – and our sector will play an integral part in regenerating high streets and communities across Wales. While our long-term strategy is to invest in strengthening tourism communities and building integrated place-making programmes in key tourism locations in Wales, the support of local residents through these challenging times is essential. As Wales opens up, we must create a careful balance that is good for both local communities and our valued visitors from across Britain and beyond.

## Health and wellbeing.

With the closure of non-essential businesses and stay-at-home restrictions imposed, many people in the tourism industry have been badly affected. There are increasing concerns about the stress and mental health toll of the pandemic on individuals working in this sector. Improving the wellbeing of everyone in Wales is the mission which drives our government's approach to the economy. By using the principles of the *Wellbeing of Future Generations Act*, we will work together to support the sector towards economic recovery.

# A look back over the last year.

Lockdowns, social distancing and shutting non-essential businesses have all helped stop the spread of this horrendous virus. While restrictions designed to keep Wales safe have had a devastating impact on the visitor economy, businesses have demonstrated incredible resilience and innovation. During the brief reopening of the sector last summer, there was healthy demand for travel within Wales and from across the UK. But there are a number of lessons that can be learnt by looking back over the last year, some examples of which are provided as follows:

## Adaptability.

Last year many businesses adapted their premises to prioritise staff and customers' safety. Managing social distancing is now the 'new normal' for businesses across the sector. Other processes have also been established as parts of business operations; from collecting customer details to support contact tracing, to managing the number of customers in a setting, conducting risk assessments and implementing rigorous cleaning regimes. Clear guidance and staff training were essential for businesses.

## Communication networks.

Establishing strong communication networks with stakeholders helped in shaping messaging, campaign development, wider activity and the collective nature of this plan. The [Visit Wales news bulletins](#) also proved an important communication tool for the wider industry. We saw businesses come together to help their local communities to problem-solve and innovate – and this sense of purpose is something we do not want to lose.

## Public behaviour.

While the brief reopening of the sector was welcomed by businesses, littering, fly camping and illegal parking at tourism hotspots all increased, causing issues for local communities. In response, Visit Wales launched the [Addo "promise" tourism campaign](#) to promote responsible behaviour when visiting Wales.

## Local infrastructure.

Partial reopening of the sector presented some key challenges, highlighting important interdependencies at a local level. For example, with some car parks closed, others nearby were quickly overwhelmed. In order to help alleviate these problems, future consideration will look at how to support local infrastructure.

## Communities.

As lockdown lifted last summer, visitors were warmly welcomed back to Wales. However, this led to concerns around some communities being overwhelmed with visitors. Tourism and visitors are part of the community. A careful balance is needed to ensure tourism is not only good for visitors – but good for the economy, the people and communities of Wales.

# The road to recovery.

Much has changed since restrictions were first imposed on our lives last year. Although the vaccination rollout offers hope for a normal life, we have seen the emergence of new coronavirus variants in the UK. We are all learning how to live with this virus.

Currently, Welsh Government's [Coronavirus Control Plan](#) sets out four alert levels for easing restrictions. To assess the impact of moving between levels, a cautious approach is required. This enables Welsh Government to witness any effects of previous relaxations.

Decisions to reopen parts of the sector will be considered if there is enough headroom available to make further changes, while keeping the virus under control.

Wherever possible, a UK-wide framework will be taken – but Welsh Ministers will make independent decisions if needed, guided by public health data, not dates.

In order to reopen safely, it is acknowledged that the industry needs sufficient time to plan. Throughout the pandemic a close working relationship between Welsh Government and various stakeholder groups representing the industry has been key.

Although the all-Wales measures are unlikely to focus on specific dates, early signals will be provided to these groups regarding the potential easing of restrictions in advance.

Any interventions in this plan will be rolled out in parallel with any changes in the Coronavirus Control Plan.

At a time when the visitor economy also faces a number of broader challenges – from a global recession, changing travel attitudes, long-term impact on major events and the night-time economy and further coronavirus outbreaks – it is important that businesses stay flexible, adapting to rapidly changing circumstances. It could be some time before pre-pandemic visitor levels return. As such, the road to recovery for our sector remains uncertain.





# Insights: our sector.

In 2019, spending on tourism in Wales totalled **£5.97 billion** and the industry employed 149,600 people in Wales, totalling 11.8% of the workforce, of which, 122,400 people, 9.6% of total employment in Wales, worked in hospitality.

2019 saw:	Indicative 2020 performance:	Furlough (UK-level figures)
<ul style="list-style-type: none"> <li>– 10,698,000 overnight domestic GB trips to Wales – an increase of 6.8% and generating expenditure of £2,003 million.</li> <li>– 87,300,000 day visits in Wales – a decrease of 8.8%. These visits generated expenditure of £3,447 million.</li> <li>– 1,023,000 international trips to Wales – an increase of 3.6%. Visitor spending was £515 million, which was an 18.8% increase on the same time last year.</li> </ul>	<ul style="list-style-type: none"> <li>– Hotel occupancy rates down 20% over course of 2020, but only down 8% in August.</li> <li>– Occupancy in August 2020 was 90%, with many people making bookings once lockdown restrictions were lifted. However, in September, occupancy was the highest it had been over the last three years at 82% – 14 percentage points higher than the previous year.</li> </ul>	<ul style="list-style-type: none"> <li>– As of January 2021 56,800 Accommodation and Food Services, and Arts, Entertainment and Recreation workers in Wales were on furlough. Across the UK, over half of all workers in these industries were on furlough, compared to 16% of workers across all industries in the UK, and 14% in Wales.</li> </ul>

97% of tourism businesses in Wales reported a loss in revenue for 2020, with nearly half (49%) reporting losses between £10,000 and £50,000.

Other business impacts of COVID-19 reported by businesses in February 2021 have included:

- Stress for owners – 48%
- Inability to plan ahead – 42%
- Loss of own savings – 19%



# Insights: our visitors.

Forecasting at this time is difficult. Given the fast-moving situation and the unique circumstances of the pandemic, the outlook and consumer intent can change daily.

However, we know that international travel will be slower to recover, and that short-haul is expected to recover faster than long haul. VisitBritain's internal forecasts have suggested international visits to Wales in 2021 may decline by 72%, compared to figures in 2019 which stood at 1,023,000. Spend is likely to decline by a similar amount.

Other factors could prevent inbound tourism from recovering to pre-COVID levels, even beyond 2021. These include the economic situation in each market, rising unemployment and potential fiscal tightening and new behavioural habits affecting leisure and business travel, and a predicted slower recovery of international tourism.

We will continue to examine data from surveys and other sources to understand consumers' intent to take holidays within the U.K – and abroad. Consumer behaviour has changed rapidly in the last 12 months. It is critical that we understand shifting consumer sentiment to underpin the implementation of the actions in this plan.

While we expect domestic tourism and 'staycations' to partially recover during 2021 once restrictions are eased, this is still likely to be well below 2019 levels.

Recent findings from the Tourism Business Barometer showed that of those businesses currently taking forward bookings for 2021, 67% report having fewer bookings than they would normally have at this time of year, with the majority stating that people remain cautious about booking.

**From a consumer perspective, the proportion of UK adults intending on taking a trip at key periods are currently:**

- 13% between April and June
- 27% between July and September
- 20% from October onwards
- 34% are not intending to take any domestic overnight trips at all

However, there is likely to be high demand for staycations in summer 2021, following disrupted travel plans in 2020 and early 2021. Last-minute bookings may accelerate, with 35% of those intending to take a summer break booking nearer the time.

**COVID-19 has accelerated some pre-existing travel trends but also created shifts in consumer values and lifestyles. Rural-based holidays, cultural excursions and camping trips are likely to remain popular in 2021.**

- The key barriers to travel confidence are:
- Restrictions from Government (59%)
  - A view that it is irresponsible to travel (48%)
  - Fewer places to eat out/drink (41%)

# About this plan.

This plan has been developed through conversations with our industry and wider stakeholders – building a clear picture of the challenges businesses currently face and are expected to encounter. It has relied on important research and insights from long-term trends shaping global tourism, the way people travel and how visitor expectations are likely to evolve. It is also based on in-depth analysis of the current performance of the sector and its future recovery prospects.

Key to successful delivery of this plan will be an ability to Communicate, Collaborate, and Innovate.

## Objectives.

The shared objectives of this plan are to:

- Understand the pressures affecting businesses by using key research and insights.
- Ease cash flow challenges affecting the industry through interventions delivered as a result of this plan and consider longer-term financial levers.
- Retain, develop and attract a skilled, committed and diverse workforce.
- Future-proof the sector – including business resilience, sustainability and profitability for the longer-term.
- Rebuild an engaged, sustainable and vibrant sector.
- Promote Wales in the UK and beyond as a distinctive place to visit, launching new products, experiences and events in line with the Cymru Wales brand.
- Improve the wider economic wellbeing of Wales, driving prosperity and sustainability.

## Assumptions.

While developing this plan, the following assumptions have been made:

- COVID-19 will have a cyclical rather than structural impact on consumer behaviour, except at the margins. For example, deciding not to fly or travel to business meetings.
- Domestic tourism is likely to surge as restrictions are eased.
- Tourism in coastal and rural areas across Wales are likely to bounce back stronger than cities – as seen last summer.
- International tourism will take longer to recover and is dependent on many variable factors including the rollout of vaccines.
- Short-haul travel is expected to recover faster than long-haul.

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# 8 essential themes.

This plan has been built on eight essential themes, around which interventions have been designed to support the sector through short to medium-term recovery.

## Our core themes are:

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1. Supporting business. →

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2. Valuing people. →

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3. Reopening safely. →

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4. Rebuilding consumer confidence. →

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5. Stimulating and managing demand. →

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6. Developing local visitor economies. →

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7. Transforming the sector to be more resilient. →

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8. Developing tailored recovery plans. →

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Although there are wide ranging interests regarding recovery, we must work together to recover the domestic market within the next six months to pre-COVID levels, and bring back international visitors to pre-COVID levels within at least 2 years. Clear lines of responsibility will need to be established across the public and private sector to determine how the proposed interventions will be shaped.

Our guiding principles to prioritise the type of intervention will be whether they are:

- Critical to the sector’s survival over the next six to 12 months.
- Essential to business survival and guaranteed employment.
- Important in helping businesses to become agile, flexible and resilient.
- Relevant for the longer-term and establishing an operating environment that addresses external challenges, drives high inclusive growth, enhances local infrastructure and supports transition to a low carbon economy.

The types of interventions detailed in this plan represent the views of a range of stakeholders and businesses across the sector. They demonstrate that a significant level of investment in support may be needed – beyond the public sector. If support is provided in the right way, tourism will generate very significant returns to the economy and local communities. While our overall vision for the future of the industry is set out in [Welcome to Wales: Priorities for the Visitor Economy](#), the pandemic has forced our sector to adapt.

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# 1. Supporting business.

Wales has a lot to offer. With the right help, our industry will recover. The unprecedented levels of financial and business support from Welsh Government and UK Government for our industry should be seen as an important investment in the future Welsh economy – and long-term prosperity of Wales.

## Interventions

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### Welsh Government compensatory funding.

While Welsh Government and its delivery partners have facilitated rapid and effective access to COVID-19 financial compensatory support packages throughout the pandemic, additional financial interventions are likely to be required to help particular areas of the sector and businesses most affected by COVID-19 restrictions over a sustained period of time.

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### Welsh Government recovery funding.

Ongoing market-readiness support to invest in skills, technology and innovation are likely to also be required to kick-start the reopening, recovery and future-proofing of the sector. Capital funding will be required to realise important infrastructure developments to ensure the on-going competitiveness of the sector, and destination management and marketing funding are also likely to be required to develop interventions to balance the spread of visitors in line with tourism infrastructure to ensure a positive impact on communities.

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### UK financial levers.

Engagement will still be required with UK Government to continue to provide the necessary funding in order to ensure the healthy recovery of the visitor economy in Wales. Influencing the role of the UK Government in supporting the sector remains a key priority over the weeks and months ahead.

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### Equality of support.

A key priority will be to ensure equality and inclusion for Black, Asian, and Minority Ethnic Workers across the sector through support provision. Consideration will also be given towards potential future support for any businesses that may not have been eligible for financial help to date. This will include identifying the need for targeted support for small operators, freelancers and businesses whose longer-term revenues have been severely affected by the pandemic.

# 1. Supporting business.

## Interventions



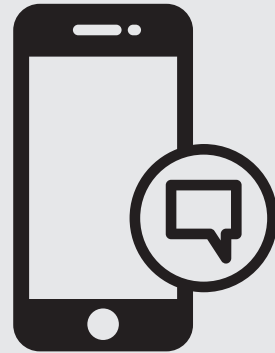
### Mental Health & Wellbeing.

Staffing problems, keeping customers safe and an uncertainty over whether trading will resume have all placed unique pressures on tourism, hospitality and events businesses and their staff. Sector-specific mental health and wellbeing support for workers has been identified as a priority.



### Scenario planning.

To address the upcoming challenges of 2021, businesses will need scenario planning support and guidance. Developing flexible strategies will be important for business recovery.



### Communications.

Effective communication is needed to ensure that businesses are aware of and can access continued support from the government.



## 2. Valuing people.

Tourism, hospitality and events businesses provide vital jobs to communities across Wales – particularly in rural areas. Pre-COVID, there were skill shortages in key areas of the sector as businesses found it difficult to recruit and retain staff and the pandemic has not helped this growing problem. Without support to employ the right people, the sector could suffer further.

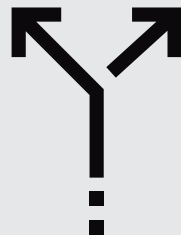
As the sector recovers, restrictions over hiring EU nationals may also mean that businesses in remote areas are faced with further recruitment problems. A clear picture will not emerge until the sector re-opens and research is undertaken to determine the impact the pandemic has had on recruitment, retention and skills.

### Interventions



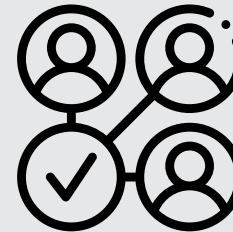
#### Collaboration.

A collaborative approach between Welsh Government, Wales Tourism and Hospitality Skills Partnership and unions will be required to address skills shortages. The aim of the Skills Partnership is to address short, medium and long-term issues relating to recruitment, training and retaining staff in the sector – and to propose solutions to the relevant agencies. Businesses will also need to work together to access funding, training for their staff and sharing knowledge.



#### Evidence-based decision making.

The Skills Partnership will gather evidence-based research and information. It will identify issues and concerns from the industry regarding skills shortages and propose solutions to Welsh Government, Regional Learning and Skills Partnerships and other stakeholders. It will also provide information on recruitment, training provision, funding and best practice.



#### Staff recruitment.

It is acknowledged that there is a need to attract people back to work in this industry and to ensure they understand the rewarding career opportunities it provides.

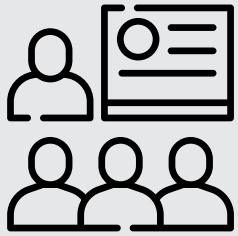


#### Staff retention.

As restrictions are lifted, businesses are likely to need help in making the right decisions – especially regarding furlough in order to maximise employee retention. Increased job satisfaction and high morale amongst employees will lead to greater retention of staff. For some, their operations will not return for some time; retaining staff skills in the sector to serve other visitors in the interim by diversifying could be an opportunity, within their locality. For example using guides and operators to provide new experiences and local product/destination training.

## 2. Valuing people.

### Interventions



#### Staff training.

Employers will need to allow staff who have been on furlough for several months to settle back into work. Training on making the workplace COVID-secure will be required – as well as digital and innovation skills to support future businesses.



#### Working conditions.

Employers will need to familiarise themselves with any changes to Welsh Government regulations on keeping workplaces COVID-secure for their staff and visitors, and staff will need to be made aware of the need for a specific COVID-19 risk assessment. Businesses will also require support to enable them to commit to strategies that maximise local employment opportunities, built on fair work principles.





### 3. Reopening safely.

To ensure the safe reopening of the sector, close consultation between Welsh Government, local authorities and bodies representing the sector and its workers will be needed. Clear lines of communication regarding safety measures for businesses must be put in place.

#### Interventions



#### Consultation.

Ongoing consultation between Welsh Government and industry stakeholders will ensure sufficient notice as possible is provided to the sector to enable preparation for reopening. For example, coach and tour operators require at least 8 weeks notice to avoid significant delays to operations. Engagement with unions will also be required to ensure the needs of employees are met as they return to work. Clear channels of communication between Welsh Government, local authorities and destination partners will be important in understanding the potential impacts that easing restrictions will have on local infrastructure.

#### Communications to and between businesses.

Businesses must familiarise themselves fully with any changes to Welsh Government regulations and guidance to keep tourism, hospitality and events settings safe. Timely, clear and effective communications will be needed from Welsh Government, local authorities and industry bodies. Consistency also needs considering e.g. if group sizes are to be limited, this needs to be decided, promoted and enforced from day one. Businesses will need to gear up quickly to respond to interest and enquiries.

#### Destination management and safety.

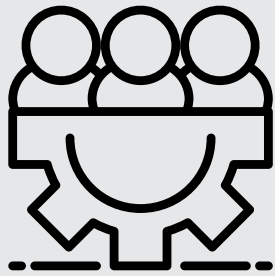
From police border controls, effective traffic management, access to adequate toilet facilities and managing bottlenecks around tourism hotspots, joined up destination management plans will be required to reduce the negative impact that reopening the sector may have on local communities and infrastructure. Having quality information available and accessible on what is open for individuals and groups and practicalities e.g. car and coach parking, drop-offs, etc. is needed in the light of changed operations and urban environments.

#### Safety mitigations.

Businesses need to be fully informed on the latest COVID-19 regulations and conduct and regularly review their specific COVID-19 risk assessment to ensure they keep their premises safe for staff and visitors, while continued monitoring of venues will be required to ensure compliance. More businesses will be encouraged to sign up to the “We’re Good to Go” industry standard, signalling that a company has adhered to Government and industry guidelines. This UK wide scheme, in place since July 2020, is now also recognised internationally by the World Travel and Tourism Council (WTTC) for its international global standardised health and hygiene protocols and its role in supporting the recovery of the UK tourism sector.

# 3. Reopening safely.

## Interventions



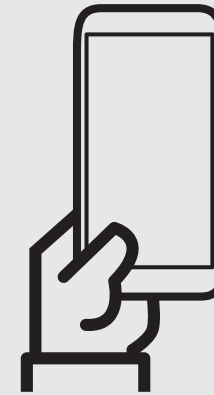
### Industry collaboration.

The successful reopening of the sector will require a collaborative approach. This will create a forum where businesses are able to share best practice ensuring safe business operations and know how and so that businesses know where to seek support. Working together to enable all parts of the sector will be key – especially attractions, smaller hospitality businesses and other experiences. This will ensure that businesses are able to open up as soon as allowed to all visitors (including for group visits), encouraging visitors to all venues to spread the impact and benefits. Finding ways of delivering group tours – with consistency across multiple attractions/activities – is also needed.



### National-led communications.

To keep the sector open and safe, Visit Wales will implement a sustained 'Addo' – Promise behavioural campaign to mitigate anti-social behaviour whilst welcoming visitors back. This campaign, which was welcomed by consumers and the industry during the brief reopening of the sector last year, provides a real opportunity for collaboration across the industry on messaging – and will be used as a 'preparedness' campaign during the phases of re-opening, providing an important welcoming message to visitors and an on-going reminder throughout the season to keep Wales safe.



### Local-led communications.

Communication at a local and regional level will also play a key role in influencing where and when people visit and explaining any differences between restrictions in Wales and other areas of the UK. Consumers will be encouraged to plan ahead and demonstrate responsible public behaviour when visiting. Communication will also be needed to reassure customers and local host communities. Visit Wales will share an 'Addo' toolkit with partners to ensure a collaborative and consistent approach to communication.



### Cross-border communications.

As travel restrictions are lifted, extensive cross-border communications explaining any differences in regulations between England and Wales will be required as they affect tourism. This includes engagement with ethnic minority groups to overcome any language barriers. Providing clear advance booking information – especially for travel trade business which operates cross-border (sometimes with combined England and Wales tours) will be needed.

## 4. Rebuilding consumer confidence.

Staycation bookings are expected to increase as the sector reopens. However, consumer confidence needs to be rebuilt. The population is likely to be split, with many people keen to visit Wales, while others – such as the elderly or vulnerable – more reluctant. Much will depend on the success of the UK vaccination programme and the resistance to any new coronavirus strains.

### Interventions



#### Research & insights.

Research and insights will be required to monitor public confidence. Sharing this information with the industry will also enable businesses to help predict demand and prepare for the future.



#### Consumer reassurance.

“We’re Good to Go” is the official UK mark to prove a business has met Government and industry COVID-19 guidelines. This benchmark will continue to help build consumer confidence by showing visitors that businesses are operating safely. Similarly, the ‘Addo’ – Promise campaign will reassure people that a collaborative approach is being taken towards ensuring that tourism, hospitality and events settings in Wales are welcoming and safe.



#### Positive PR and influencers.

Influencers and key industry spokespeople will play a key role in driving consumer confidence. We must continue to promote a positive message to our audiences that Wales’ tourism and hospitality businesses are safe.



#### Sense of Croeso / Welcome.

As travel restrictions are lifted, Visit Wales and other industry partners will work together to welcome visitors back. While international tourism is likely to take longer to recover, it will be important to continue to focus on building Wales’ profile as a world-class destination.



#### Public transport.

In line with creating a greener Wales, a collaborative working relationship with Transport for Wales will be needed to encourage visitors to start reusing public transport and reinforce Wales’ credentials as an engaged, sustainable and vibrant nation.

## 4. Rebuilding consumer confidence.

### Interventions



#### Destination management and reassurance.

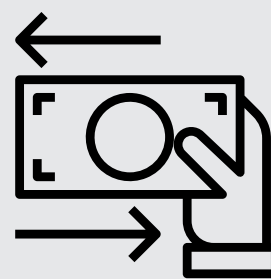
Consumers and communities will need reassurance that adequate measures will be put in place to support the return of tourism and potential overcrowding of popular destinations across Wales.



# 5. Stimulating and managing demand.

As the sector reopens, it is likely there will be high demand for domestic travel. However, given it is anticipated that international tourism will take longer to cover, competition between other UK nations will be intense.

## Interventions



### Research & insights.

Regular research conducted by Visit Wales will need to continue to gauge consumer sentiment and to help predict a clear sense of future demand. Using technology and live data to determine a real time picture of visitor demand will help to identify where the focus needs to be in terms of managing capacity and demand.

### Seasonality, Spend and Spread.

Targeting the three key challenges of seasonality, spend and spread will help manage demand as the sector reopens. In order to develop the industry, the focus will need to be on encouraging more people to come to Wales during off-peak periods (Seasonality), encouraging visitors to spend longer and spend more in Wales (Spend) and helping people discover new tourism-ready parts of Wales (Spread).

### Cash flow and pricing.

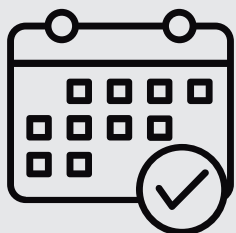
While there are some indications that businesses are anticipating an influx of bookings for the upcoming season, some may be facing hidden cash flow problems. Vouchers issued to consumers during lockdown are likely to be redeemed as the sector reopens. Potential interventions may also be required to encourage customers to book during off-peak periods to minimise the impact on badly-affected businesses. Businesses will be fed data and insights to support them in anticipating demand, and to provide them with the confidence to maintain consistent pricing and avoid radical price hiking or discounting.

### Product offer.

Outdoor attractions and wellbeing experiences are likely to be in high demand when the sector reopens. Making products visible is important when encouraging visitors to spend more in Wales. To reopen the sector safely, audiences will be encouraged to discover new places. Initiatives such as The Wales Way tourism route will help consumers identify destinations off the beaten track. Given the anticipated slower recovery of international tourism, there will be an opportunity to focus on tailored experiences to attract new domestic audiences to Wales.

# 5. Stimulating and managing demand.

## Interventions



### Extending the domestic season.

Support is likely to be needed towards boosting bookings during the shoulder seasons (autumn and winter months). Key to success will be the availability of suitable products and memorable experiences. Visit Wales will continue to work with stakeholders to grow the future of the industry, helping people to discover Wales, especially during the shoulder seasons. Other ideas that will be considered include extended opening hours at attractions and encouraging group travel bookings to avoid peak periods.



### Marketing recovery.

Visit Wales will develop a phased marketing recovery plan with a view to reinvigorating the Year of Outdoors campaign from summer 2021, increasing awareness and future propensity to visit Wales, particularly into autumn and winter. Visit Wales will also continue to invest in digital platforms to provide enhanced user experiences, real-time visitor information and build on our important digital gateway for Wales on the world stage. Opportunities will be provided for sectors, destinations, local and national partners to engage with Visit Wales in digital best practice, the national campaign and outdoor theme, and to provide input into the future themed year approach.



### International markets.

Although international tourism is not projected to fully recover for some time, it will be important to keep Wales front of mind and increase consideration for when international markets re-open. The award winning Cymru Wales brand and destination marketing campaign approach is already being deployed to re-build Wales' profile internationally, providing an important foundation for on-going work to build Wales' reputation as a world-class visitor destination to attract more international tourists in the future. Beyond Visit Wales' campaigns, maintaining the relationship with VisitBritain will also be important in helping to promote Wales as a holiday destination as part of the UK offering. In the more immediate term, Visit Wales will input into the [Global Travel Taskforce](#), set up at a UK level to provide recommendations for facilitating the return to international travel. This includes conveying the views of the sector in Wales for a return to inbound international tourism.



### Travel trade.

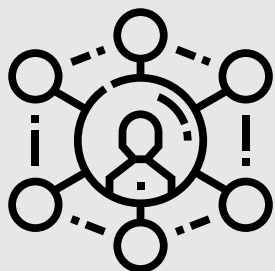
Virtual and digital travel trade engagement will continue to identify opportunities for Wales with UK and international tour operators (including potentially through VisitBritain's TXGB exchange). Plans for live engagement will need building now, along with interventions for those suppliers impacted for the longer-term, but essential for Wales to thrive again as an international destination. All businesses need to be ready to respond to enable this important area of the sector to enjoy a strong year of trading. Bringing international travel back to Wales as soon as possible safely is critical to recovery – effective input into the [Global Travel Taskforce](#) plan and incoming tourism bodies is essential.

## 6. Developing local visitor economies.

Although local-led Destination Management and integrated place-making are featured as long-term priorities in our strategic plan "[Welcome to Wales: Priorities for the Visitor Economy 2020-2025](#)", developing a clear short-term destination management plan will ensure that the impact of reopening the sector on local infrastructure and communities is minimal.

It is vital that the structures put in place are adequately funded so that visitors to Wales are warmly welcomed. We must build a better, more resilient, future for Wales.

### Interventions



#### Destination management and working together.

Local authorities, national parks and destination management partners must work together to manage and distribute resources to reduce the impact of tourism on local infrastructures and communities. Beyond a safe re-opening of the sector, a coordinated response will be needed to key issues and future opportunities, from addressing visitor management infrastructure and investment needs, to reviewing visitor management policy and ensuring effective resourcing of public authority capacity at a local level. Success will rely on a clear understanding around the inter-dependencies and collaboration between destination partners and communities at a local level.

#### Destination marketing.

From a marketing perspective, digital marketing support will be required for sector groups and destination management partners to enable them to maximise their online presence. Together, contemporary ways for promoting the regions and destinations of Wales to new audiences will be explored. A partnership approach to developing stronger and more consistent propositions for the different places and stories that strengthen Wales' identity from the perspective of a potential visitor will be required; procuring this work from others according to clear briefs. In addition, campaigns to promote responsible behaviour in tourism hotspots will be needed to avoid anti-social behaviour in the future.

#### Place-making programmes.

Visit Wales will drive forward integrated place-making programmes in destinations where tourism is either the main or a key economic sector. This will include continuing to work across Welsh Government and with outside partners to develop truly joined-up place-making and visitor experience masterplans, ensuring that the investment and interest of a wide range of interventions is brought to bear within each community in a focused and coordinated way, from transport, heritage and regeneration to public health.

#### Destination management structures.

In the longer-term there will be need to support improved destination management across Wales via a reinvigorated structure and Destination Management Partnership approach, with a greater emphasis on true public/private working and on cross-organisational delivery to get the basics right. A destination management conference will be required to design this in practice.

# 7. Transforming the sector to be more resilient.

This is a challenging time for our industry – but businesses can adapt. There have been many examples witnessed of businesses evolving to take advantage of new technologies and supply new markets.

A strategic plan for the sector “[Welcome to Wales: Priorities for the Visitor Economy 2020-2025](#)” was published prior to the pandemic in February 2020, setting out a clear vision for the future of our industry. However, areas of this plan may need to be revisited to ensure it is relevant post-COVID.

## Interventions



### Innovation.

To support businesses, a focus needs to be placed on boosting product innovation and investment in funding to help the sector survive – and thrive. This is our opportunity to secure sector-wide commitment to reduce Wales’ carbon footprint and promote sustainable tourism.



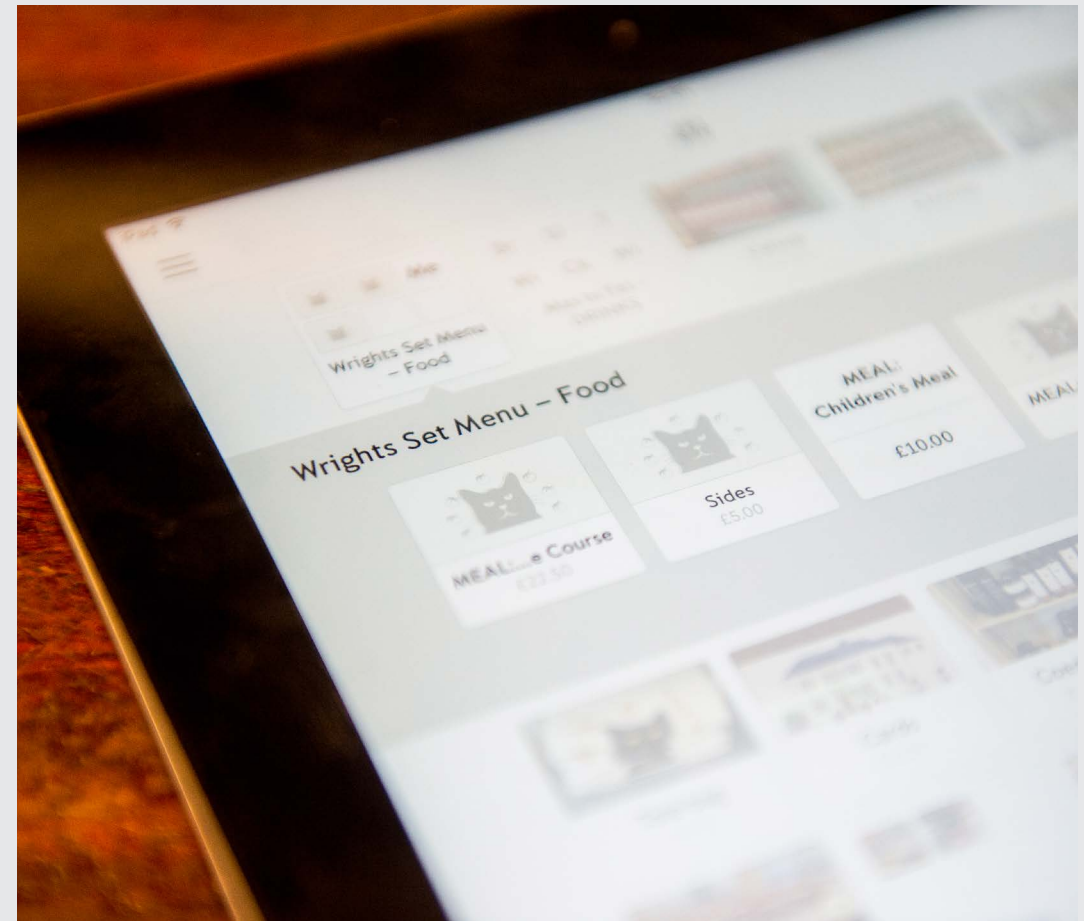
### Investment in digital capability and capacity.

The digital capability and capacity for businesses will be a priority to enable businesses to take advantage of technology to help improve their productivity and agility, increase their resilience and create new market opportunities in the future. Digital training will also be vital for those working in our industry. Consideration will need to be given towards who and how this will be resourced.



### Digital trends.

Nowadays far more consumers are searching for holidays or booking attractions online – and many small businesses will need support to improve their online presence. When it comes to marketing Wales, we must showcase the best that this nation has to offer – providing virtual tours and stories to attract visitors and make our products more visible online.





## 8. Developing tailored recovery plans.

The roll-out of this plan is dependent on the Coronavirus Control Plan and movement between the four alert levels. It is anticipated that there will be longer-term impact on some key sub-sectors, particularly those involving the free movement of large groups of people such as major events, business events, the night time economy and the cruise sector.

This also extends to certain types of businesses within the sector such as operators of wedding venues, which have not only depend on long lead times for new bookings, but which also support important local supplier ecosystems.

For key high risk sectors, more comprehensive future-proofing and tailored recovery plans are likely to be required, including advisory groups to put forward a range of ideas for how best to accelerate re-opening and recovery.

More comprehensive future-proofing and tailored recovery plans will be required for the safe reopening of these high risk sectors, including advisory groups to put forward a range of ideas for how best to accelerate the recovery of these areas of the sector.

### Key Interdependencies.

#### Vaccinations.

As tailored recovery plans are developed for high risk areas of the sector, there will be a need to monitor the progress of the vaccination rollout, learning how effective they are on any new coronavirus strains emerging in the UK.

The impact on the sector should population-wide vaccine certification be introduced will need to be considered. In particular, any international travel certification introduced to enable future travel will impact on the sector. This includes any potential short-term changes introduced in this area to act as a bridge to longer-term objectives on delivering vaccine certification to facilitate travel.

### Testing.

We can now use new testing technologies in addition to existing lab tests to test at far greater scale, frequency and speed. Our refreshed testing strategy sets out how we will use lateral flow devices to regularly test the asymptomatic workforce across sectors to safeguard and maintain services. As we open the economy there are opportunities to support the tourism and hospitality sector workforce with regular testing.

The strategy also recognises that it could theoretically be possible to enable people with a negative test result to undertake activities that might not be possible otherwise. However, the use of testing in this way has not been approved by the relevant regulatory bodies and there are potential risks associated with it that need to be better understood. We will need to take a very cautious approach and be guided by the evidence. Testing in this way also presents practical and logistical challenges which means even if possible, it may not be a viable option in all cases.

## 8. Developing tailored recovery plans.

### Major events.

The events industry in Wales was effectively shut down overnight in March 2020. The danger of coronavirus spreading when people gather in large groups, and the implications of national and international travel to and from events, means that the sector will also be one of the last to fully reopen.

Nevertheless, a full and vibrant cultural, business and sporting events programme for Wales is essential. It is argued that events, above all else, can demonstrate that Wales is, once again, fully open. In order to do this safely and effectively, however, the Event Wales team need to continue to provide leadership and guidance to the sector in Wales through the Event Wales Industry Advisory Group and its sub-groups established among Sports, Arts and Business stakeholders.

In line with the relevant Welsh Government and UK Government regulations and guidance – to which the Group will need to contribute – Event Wales will oversee the tentative return of selected test events to run in Wales during Spring/Summer 2021, if conditions allow.

This is as a means of road-testing a route for a full programme of events to return safely as soon as possible. It will run alongside any additional UK Government/Welsh Government-deployed funding support for the sector.

### Night-time Economy.

The night-time economy, heavily reliant on free movement of larger gatherings of people, has been hugely affected by the COVID-19 crisis. Live performances (from musicians to bands, DJ performances, comedy, quizzes and nightclubs) bring additional risks in terms of amplified sound. However, this sector provides an important social and cultural role in society (particularly for young people) and contributes positively to mental health and wellbeing.

Close consultation over the coming months with key stakeholders from the British Bar & Pub Association to the Night-time Industry Association (NTIA) will be required to ensure the safe re-opening of this area of the sector. Innovation within the sector to ensure these types of premises are able to adapt will be key to re-opening. This includes organic risk mitigators such as audiences facing stages to watch entertainment and key safety measures put in place where the 2m social distancing rule is not commercially viable.

Despite the UK vaccination programme rolling out at pace, a number of key challenges are still presented by testing, with rapid flow lateral testing technology not yet proving viable for 'testing to enable' scenarios.

To help rebuild this sector, a collaborative approach between Welsh Government and industry bodies representing the different parts of the night-time economy will be required to explore measures for opening parts of the sector. However it is not anticipated that every venue will be able to re-open in the immediate future and therefore ongoing consideration will need to be given to potential financial support. Similar to the Events industry, the aim will be to work together to identify pilot schemes around which portions of the sector may be able to open viably while operating within key COVID-19 safety parameters – providing a pathway towards reopening.

## 8. Developing tailored recovery plans.

### Travel Trade.

Domestically, the re-opening of tourism and hospitality businesses for travel trade/group travel is expected to mirror the timeframes that will apply to all visitors. Travel trade/group travel should be possible (as in 2020) once travel restrictions are lifted and serviced accommodation and attractions re-open. However, there are key issues with specific impacts on this part of the industry:

- The minimum 8-week long lead-in time to cancel or re-arrange existing bookings, and to plan new bookings once re-opening dates are announced;
- The pivotal role of visitor attractions within the tour and coach holiday offer; if some attractions do not re-open or restrict access – such as to groups – that will create issues for operators to honour their advertised tours/holidays;

– Potential supply chain issues throughout the sector may further hamper the successful re-start of travel trade business in 2021 and beyond;

– Clear marketing and communications to ensure the understanding of the Wales offer and any restrictions (especially as operators often will operate across borders)

Internationally, additional challenges are present e.g. quarantines, and working with our industry along with the Global Travel Taskforce, VisitBritain, UKinbound, Coach Tourism Council and other bodies will be essential to ensure that Wales welcomes international travel trade business as soon as it is safe to do so. Working closely with key stakeholders throughout the industry will help develop practical plans to address these issues.

### Cruise.

The early stage of the pandemic gave rise to high profile outbreak incidents associated with the cruise lines, which meant that the cruise industry in Wales and the rest of the UK was effectively closed down in mid-March 2020. During last year, out of 103 cruise calls booked for Welsh ports, only one actually called in at Cardiff and the rest of the season was cancelled. The impact of the pandemic has meant that some lines are now declaring bankruptcy, with others having sold some of their fleet in order to survive.

As an industry, cruise was worth 10 billion in 2019 to the UK economy and supports an extremely diverse supply chain. Prior to the pandemic, there was an increase in the number day calls to the UK from 1.1m to 1.7m and this is testament to a collaborative four nation approach taken to growing the industry.

The danger of coronavirus spreading on board a ship and involvement of passengers travelling to and from European and international ports, means that the cruise sector presents a high level of risk and will be one of the last areas of the visitor economy to be fully operational.

However this collaborative four nation approach provides strong foundations for working together to enable the safe re-opening and recovery of the sector. This includes consultation with cruise lines to enable adequate preparation time for re-opening. (A ship typically requires up to 12 weeks to prepare for service including re crewing and ensuring all protocols and training are in place to a uniformly high standard. It also takes a similar period for critical elements of the shore side supply chain to prepare for a secure return to service).

The UK COVID-19 Framework for the safe resumption of cruise was published in September 2020 and is the result of significant work between the Department of Transport, UK Chamber of Shipping, Cruise Lines International Association, cruise operators and other industry stakeholders and in line with the relevant Welsh Government and UK Government regulations. This Framework provides a solid foundation for a re-opening and recovery plan for the sector, and for a phased approach to sailings in line with any relevant Welsh Government regulations.

# Measuring success.

Our industry has been faced with many challenges during the pandemic. As vaccinations offer us a life out of lockdown, we must now work together to promote Wales as a safe place to explore, attracting tourists from across Britain to holiday in Wales over the next six months.

Ultimately, the success of this plan will be measured in terms of whether our key stakeholders believe the necessary actions have been taken over the next few months to help the domestic market recover to pre-COVID levels within the next six months, and bring back international visitors to pre-COVID levels within at least 2 years.

Success will also be measured in terms of whether the right conditions have been put in place to create resilience within the sector for the longer-term – and whether we will be in a position to return to our strategic vision for the future [“Welcome to Wales: Priorities for the Visitor Economy 2020-2025”](#).

The visitor economy is a people-industry, and its success relies on ensuring that everyone that engages with it benefits. From visitors, local residents, and crucially, partners within the sector itself. This means continuing to grow the economic benefits of tourism, hospitality and major events, maximising their collective contribution to prosperity across Wales, through an industry that has recovered well and is once again performing at its best.



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