



**Recovery and Realignment
Wiltshire Tourism Recovery Plan
March 2021**

Introduction

The tourism industry has been impacted to an unprecedented extent by the Covid-19 pandemic and the shock is likely to reverberate through the visitor economy in Swindon and Wiltshire for some time to come.

VisitBritain's central scenario forecast for inbound tourism to the UK in 2020, updated in Jan 2021, is for a decline of 76% in visits, from 40.9 million to 9.7 million, and a decline of 80% in spending from £40.9bn to £5.7 billion.

The revised central scenario for inbound tourism in 2021 is for 11.7 million visits, up 21% on 2020 but only 29% of the 2019 level; and £6.6bn spend, up 16% on 2020 but only 23% of the 2019 level.

In fact tourism experts surveyed by the World Tourism Organisation are forecasting a return to 2019 international tourism levels could take until 2023 or later.

The forecast for domestic tourism expects a 62% downturn in spend in 2020, down to £34.4bn against a 2019 spend of £91.6bn. Whilst a stronger recovery is forecast for domestic tourism the prediction is that spend will reach £61.7b, only 67% of the level of spending seen in 2019.

This magnitude of loss extrapolated to the Wiltshire level is devastating. VisitBritain estimates that in 2020 the value of tourism to Wiltshire's economy reduced by £900m from £1.5bn to just £600m. If Wiltshire tourism is able to match the predicted national rate of recovery, the value of tourism will recover in 2021 to £1bn, and to £1.2bn in 2022. It won't recover to 2019 rates before 2024.

Many competitor destinations around the UK are already increasing their investment in tourism as a result of the pandemic. Including a number of LEPs now investing revenue budgets in supporting the sector, including in Cheshire, Shropshire, Herefordshire, Oxfordshire, Kent and the South West.

Tourism and Hospitality is widely acknowledged to have been the hardest hit sector of the economy. Urgent action is required to accelerate the speed of recovery and to support local economies and communities around the whole of Wiltshire. Failure to take this action will result in Wiltshire under-performing against the national recovery; losing market share and experiencing a higher number of business failures and loss of jobs in our towns and rural destinations compared with competitor destinations.

This Tourism Plan has been developed in consultation with tourism businesses and stakeholders around the county and is intended to form a key element of Wiltshire and Swindon's wider economic recovery plans. The intention is that it links to and is used to help derive maximum benefit from, the national Tourism Recovery Plan due to be published by Government in April 2021.

Supporting 29,000 jobs, the visitor economy is embedded within the fabric of the economy in Wiltshire, with visitor expenditure extending across sectors, supporting not only accommodation providers and tourist attractions, but cultural venues, events, local transport, retailers, restaurants and local food producers. A decline in visitor expenditure directly impacts across all of these sectors and a decline in the health of these sectors results in declining competitiveness of our cities, towns and rural communities.

The SME and micro-businesses who make up the majority of the sector have struggled to survive through sustained lockdowns and business confidence in the sector is low. Although country cottages, camping, glamping and some types of serviced accommodation is set to benefit from the expected staycation boom this summer, all accommodation and most other tourism businesses are very concerned with medium and long term survival. Prospects for domestic travel to Wiltshire after the summer are extremely poor, despite welcoming the positive vaccine progress and immediate roadmap on lifting lockdown restrictions.

As a critical component of the Wiltshire economy, all partners and stakeholders with an interest in a thriving visitor economy must now work together to ensure survival and to realise the economic and social benefits of the visitor economy. For Wiltshire Council specifically these economic and social benefits include supporting the strategic role of Local Government in place shaping, building and shaping local communities and identities; helping make our places more attractive to new investment; and more attractive year-round places to live, work and study. Other economic and social benefits include supporting Shop Local objectives; supporting declining high streets, new SME business creation, supporting sustainable tourism objectives and helping younger people and parents into work.

Objectives of this Plan

This document outlines the tactical response required to safeguard and rebuild tourism in Wiltshire in 2021/22 and looks ahead, setting out strategic imperatives, priorities for action and a case for the investment required in order for the tourism industry to survive and thrive, delivering benefit to the wider Wiltshire economy as it recovers from the impact of the pandemic.

This Tourism Recovery Plan is intended to help guide and support the wider Wiltshire Economic Recovery Plans. It will support tourism businesses and communities around the county and significantly accelerate the speed of recovery.

The plan recognises that partnership working will be required between stakeholders and across sectors of the visitor economy, including the culture and leisure, retail, night-time economy and transport sectors and that, due to the fragmented nature of the industry and the market failure conditions in which it operates, a programme of targeted support will be required in order to safeguard the industry and its contribution to jobs and the wider economy in Wiltshire

VisitWiltshire

VisitWiltshire is the official Destination Management & Marketing Organisation for Wiltshire representing 500 Partners. In 2017 it was designated as one of 12 Lead Destinations in England by VisitEngland/VisitBritain. It is a public/private sector not-for-profit membership organisation responsible for promoting the area regionally, nationally and internationally. VisitWiltshire's priority

is to grow the county's Visitor Economy by raising awareness of the destination and generating additional tourism visits and spend.

We provide services and expertise that supports the performance and growth of the tourism industry in Wiltshire. In 2020 VisitWiltshire worked with over 1,200 tourism businesses from all sectors of the visitor economy. As well as high profile marketing, PR and travel trade activity, business support including advice, research and industry insight, advocacy, training opportunities.

Future Forecasts for Travel to Wiltshire

VisitBritain estimates and forecasts predict that domestic tourism will be the first to recover in 2021 and that with public sector intervention tourism recovery will be attained fully for some destinations by 2022. Despite significant pent-up demand, without intervention international tourism is not expected to return to pre covid levels until 2023 and beyond. Significant marketing activity will need to be undertaken to prevent a decline in the domestic staycation market in 2022 as a result of international traveller opening up.

Despite optimism for a return on the staycation in 2021 and release of pent-up demand for some types of businesses (eg holiday cottages, glamping, luxury hotels), there are a number of barriers to business recovery that this plan addresses. Tailored sector-specific business support is required to support businesses in understanding and responding to travel restriction and how to employ social distancing measures. Plus on how to respond to reduced capacity challenges facing, for example, event organisers and many small accommodation providers; to changing consumer preferences such as for outdoor venues and new experiences; and to changing customer requirements for direct consumer and indirect intermediary bookability.

A greater degree of risk aversion amongst travellers is likely to lead to visitors seeking 'off the beaten path' type experiences and destinations and to a greater importance on pre-trip planning (WTTC report). Increased use of digital for pre travel booking, planning and reassurance. Sustainable tourism will become an increasingly important factor for travellers.

National sentiment research carried out by ALVA and BVA/BDRC indicates that Wiltshire's is well placed to benefit from visitors wanting to get off the beaten track and discover new experiences away from crowds. Rural areas and towns that invest in tourism development and promotion have a good opportunity to benefit. The sentiment studies suggest that larger towns will have to work harder to attract visitors. There is expected to be an increasing amount of resistance to tourism from honeypots which the tourism recovery plan will need to address through seasonal and geographic spread.

The nature of restricted capacities will see a slower return for business and event travel, but through this tourism plan those that are supported through a programme of tourism-specific business support and who can take advantage of latest relevant technology and techniques will recover quicker.

Strategic Challenges

Market Failure and the need for effective sector support

The tourism industry is predominantly comprised of SMEs, who need support to work together to reach visitors under meaningful destination brands.

Effective industry support

The pandemic has shown the tourism sector to be difficult to reach, tending not to engage in general business support schemes.

DMO Funding

Funding for DMOs to develop long term rebuilding and marketing initiatives is limited due to constrained local authority budgets

Health of Wider Visitor Economy

All sectors of the visitor economy have been impacted by the pandemic. A decline in the health of retail, food and drink and cultural sectors impacts negatively on the attractiveness of the visitor offer, further inhibiting ability to attract visitor spending.

Industry use of Digital Technologies

It will be vital to see the traditionally low industry use of digital technologies increase for marketing and booking purposes for developing leisure and corporate tourism business.

Wiltshire Brand Awareness

There is a need to secure longer term funding in order to develop a sustainable long term approach to destination brand building in a highly competitive environment.

General market conditions

The pandemic comes at time of uncertainty and challenge for the industry due to the effects of Brexit and amplifies the difficulties faced in international markets.

Principles of this recovery plan

Four core principles cut across the plan and will be critical to its success:

- **Collaboration**
We will proactively identify opportunities for collaboration with partner agencies within Wiltshire (including SWLEP, Wiltshire Council, Business West, FSB, BIDs, Town Councils, etc.), within and across visitor economy sectors and within and outside of Wiltshire's boundaries. We will seek to maximise benefit for tourism from aligned strategies in the cultural, heritage, high street and will work with our partner trade associations and with VisitBritain and VisitEngland ensuring a strong voice for tourism and its role in wider economy.
- **Insight based**
All action will be underpinned by insight and intelligence, maximising the impacts of expenditure and investment. We will champion the gathering and sharing of robust insight and information across the tourism sector and between aligned sectors of the tourism economy and this information to lobby for what the industry needs.
- **Innovation and adaptability**
As a largely rural destination Wiltshire is well placed to capitalise on demand for domestic tourism breaks but it will be essential that the visitor experience takes account of immediate changes in in visitor behaviours and needs. Many businesses have shown innovation

throughout the lockdowns, including development of outdoor cultural programmes, take home services, etc. In the medium to long term innovation must continue to ensure the competitiveness of Wiltshire's offer, enabling the county to compete for a share in tourism recovery in a competitive market.

- **Sustainability**
All plans to recover and grow the value of tourism for the Wiltshire economy must take into account the need to protecting natural environments and resources, provide authentic tourist experiences that celebrate and conserve heritage and culture and creating lasting socio-economic benefits for communities through employment and income earning opportunities.

1. Industry Rebuilding - Safeguarding for a stronger future

Aim:

Ensure the survival and return to profitability of the tourism sector in Wiltshire

Actions:

- Work closely with DCMS, VisitBritain and VisitEngland, with trade bodies including the Tourism Alliance, UKInbound, and ETOA, travel trade, media and others to ensure a joined-up approach in communicating evidence based requirements for government support for the industry. These will include:
 - Immediate and short-term measures such as business rates relief, rent protection, business support and loans, VAT relief, furlough extension as well as longer term financial support for those sectors of the industry which will take longer to recover – such as those predominantly serving international markets and business travel and those unable to operate profitably due to restricted capacities.
 - Recognition that this is a critical time for the tourism industry and not a time to impose additional burdens in red tape or taxation.
 - An acceleration and expansion of tourism zones as proposed in the Tourism Sector Deal, making the case for the Great West Way, which is 30% of the whole route and encompasses the whole of Wiltshire, to be included as a Tourism Zone
 - Improved sub-national tourism data and insights collected and produced by ONS
 - New national initiatives to inspire confidence and rebuild demand, such as Eat out to Help Out
- The creation of a functioning network of appropriately funded destination management organisations throughout England, including in Wiltshire.
- Work with Wiltshire Council to ensure planning restrictions are used to assist business recover and reopen safely, e.g. a simplified route for pavement licensing and increasing the number of days allowed for such temporary events, a temporary right that allows local authorities, either by themselves or by others on their behalf, to use land to hold a market

without having to apply for planning permission and an automatic right for restaurants and drinking establishments such as pubs and cafes to serve takeaway food.

- Work with Wiltshire Council, SWLEP, Business West, FSB and other business advice agencies to deliver practical signposting for the tourism industry to best sources of practical support; disseminating business information, information on relevant tourism accreditation schemes, sector-specific training, signposting to grant availability, etc. (VisitWiltshire to be main point of contact for tourism industry)

2. Rebuild Demand and Restore Visitor confidence

Aim: Build consumer confidence and demand for domestic breaks, growing the market in 2021/2

Actions:

- Cross partner working with VB/VE/Great West Way other destinations to maximise marketing communications for domestic tourism trips
- Engage with and proactively encourage business participation in initiatives designed to inspire confidence including the VisitEngland “We’re Good to Go’ accreditation
- Deliver reassuring consumer messaging through VisitWiltshire communications to align with national campaigns including a spring Escape the Everyday VisitWiltshire campaign
- Develop and disseminate new itineraries and content to meet needs of travellers post covid
- Target local residents to re-engage with our towns and cities, attractions and other tourism businesses via targeted campaign activity including a dedicated Wiltshire Residents campaign and via Shop Local initiatives
- Maximise benefit to Wiltshire of involvement in the Great West Way initiative and Great West Way spring domestic DEF marketing campaign
- Seek opportunities for targeting travel press, influencers and bloggers

3. Positioning Wiltshire as destination of choice in 2021/2 and beyond

Aim: Achieve cut through and gain a greater share of the visitor market for Wiltshire both in the immediate domestic recovery and longer term.

Actions:

- Deliver a programme of immersive communications throughout 2021 inspiring travel to Wiltshire - highlighting authenticity, off the beaten track experiences, safety and security.
- Maximise coverage for Wiltshire in the Great West Way Escape the Everyday Campaign in spring 2021
- Invest in a targeted campaign in Quarter 4 2021 in order to drive bookings throughout 2022
- Work closely with the Wiltshire tourism industry and visitor economy sectors delivering cohesive campaigns online and in social media (e.g. using shared hashtags to amplify communications reach)
- Continue our strategy of working closely with the travel trade both domestically and internationally to secure Wiltshire on independent and group travel programmes through to 2023 that are being worked on now.
- Work with media and influencers to showcase Wiltshire to the domestic market

- Develop new itineraries and content aligned to visitor motivations for dissemination on VisitWiltshire.co.uk and social channels and those of partners, VisitEngland, VisitBritain and others.
- Work closely with VisitEngland and VisitBritain on national campaign activity to ensure Wiltshire representation
- Work closely with the cultural sector to explore development of content programmes to appeal to visitor markets.

4. Building a Wiltshire tourism experience for the future

Aim: Ensure that the Wiltshire offer is competitive in the global tourism market, achieving its potential for increased market share.

Actions:

- Work with Wiltshire Council to identify and capitalise on opportunities for tourism and the visitor economy to benefit from strategic initiatives such as: High Street funding in Salisbury and Trowbridge; railway station initiatives in Wilton, Corsham & Devizes; WHS strategy;
- Work closely with SWLEP to identify and capitalise on opportunities for tourism and the visitor economy to benefit from strategic initiatives such as the Great West Way and carbon-neutral tourism product development.
- Collaborate with the cultural sector on long term product development
- Continue to on-board bookable product and experiences into the TX GB platform in recognition of the important role of digital in providing reassurance and bookability
- Develop a long-term collaborative strategy to increase the strength of our destination brands including Wiltshire, Salisbury, market towns, Great West Way
- Develop a long-term product development strategy in collaboration across towns and agencies involved in the visitor economy
- Increase the quality of the tourism offer across the county, identifying and addressing gaps such as in the accommodation offer
- Work with partner agencies on sector skills development – enhancing digital skills, service and welcome
- Develop a Major Events Strategy