

Subject:	Tourism Recovery Plan		
Date of Meeting:	17th June 2021		
Report of:	Executive Director for Economy, Environment & Culture		
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Ward(s) affected:	All		

FOR GENERAL RELEASE

1. PURPOSE OF REPORT AND POLICY CONTEXT

- 1.1 This report outlines the impacts of COVID19 on the visitor economy of Brighton & Hove and the work of the city's Destination Experience Group in guiding current recovery planning in the sector.
- 1.2 Covid-19 has dealt a devastating blow to many tourism and hospitality businesses in Brighton & Hove, causing what maybe lasting damage to investment and employment. Business, operators, employees, and freelancers have seen their livelihoods catastrophically impacted as they have been forced to close, in some circumstances partially re-open then re-close again or have been directed to remain closed during successive lockdowns.
- 1.3 The Brighton & Hove Destination Experience Group (DEG) was inaugurated in 2018 and is a working group made up of tourism business leaders in the city combined with council officers (Appendix 2). The purpose of the group is to provide a collaborative mechanism for monitoring, reviewing and improving the visitor experience across the city.
- 1.4 The DEG has the remit of developing a Destination Management Plan to aid in the delivery of the Visitor Economy Strategy 2018-2023 (Appendix 3) approved by committee in 2018. The strategy recommended prioritising two aspects of the Brighton Brand which are thematic strengths. These are:
 - Culture – which includes heritage, the arts, architecture and events & festivals.
 - Wellness – this is defined in the broadest sense and means escape, fresh air, nature and good food.
- 1.5 In response to the COVID19 crisis the remit of the DEG has shifted to concentrate on tourism recovery in Brighton & Hove. The two-year Tourism Recovery Plan for the city includes a set of recommendations on how best the Brighton & Hove tourism sector can adapt and recover. The two priority themes in 1.4 continue to be strengths for the city as a destination.

1.6 The second half of 2021 is being seen by the tourism sector as crucial to its survival. The highly successful vaccination roll-out and the Government's four step roadmap on the easing of lockdown gives the sector a route to recovery. There continues to be a great deal of uncertainty in the sector, which is constraining longer term decisions, but generally there is optimism that 2021 can make a strong contribution to recovery if the virus is kept in check.

2. RECOMMENDATIONS:

2.1 That the Committee adopts the Brighton & Hove Tourism Recovery Plan (Appendix 1) prepared under the auspices of the city's Destination Experience Group. This plan will become integral to the recovery of the sector.

2.2 That the Committee notes the work of Visit Brighton, the city's destination management organisation, in supporting the Tourism Recovery Plan and the wider visitor economy.

3. CONTEXT/ BACKGROUND INFORMATION

3.1 Over the course of 2019 (pre-pandemic) the value of the visitor economy to Brighton & Hove was estimated at £976 million. The city attracted over 12m visitors and supporting in excess of 24,000 jobs, which equated to 17.5% of all employment. This was the greatest level of economic impact in one year recorded since data analysis started in 2007. In 2021, from Jan – Mar, occupancy dropped in the City by approximately 63% against the equivalent period in 2020.

3.2 The Accommodation sector did demonstrate resilience with occupancy in August and September of 2020, when restrictions were lifted, rebounding to levels nearly equivalent to previous years. (Source: STR Global Research). It may take between three and five years to return to the 2019 economic impact.

3.3 The above figures are also reflected at a national level, the GDP figures from the Office for National Statistics released on the 13 April 2021 showed the severe impact that coronavirus is still having on the UK tourism industry compared with other sectors of the economy. The figures show that, compared to February 2020:

- The air transport sector is down by 91.6%
- Travel agencies and tour operators are down by 87%
- The accommodation sector is down by 73.9%
- Creative, arts and entertainment are down by 59.1%
- Food and beverage are down 51.3%
- Museums, Libraries, and other cultural activities is down by 48%

3.4 This compares to the average for the UK economy being a reduction of 7.8%, which demonstrates just how badly the visitor economy generally has been affected by the Covid19 pandemic.

3.5 It is also noted that the UK lost an average of 22 restaurants per day over the last 13 months with 10% of venues in the UK failing to open their doors at the end of April 2021 (Source: Curren Goodden Associates).

3.6 The United Kingdom leaving the EU and the longer-term impact of having fewer overseas overnight visitors to the city - which generated over 2.3 million nights in 2019 - is another consideration likely to have a negative effect on revenues generated.

3.7 The recovery of the tourism sector requires all stakeholders to collaborate on practical solutions that are deliverable, this has been broken down into four Strategic Priorities, set out below.

- **Ensure the visitor economy is represented locally, regionally, and nationally to be heard on key issues:**

As funding and recovery policy is developed, it is crucial that as a major destination, the city is well connected and able to advocate for Brighton and Hove in regional, national and international dialogues and campaigns. Cohesive and coherent messaging from all stakeholders is required.

- **Build back consumer confidence and awareness:**

Engaging businesses in areas of activity such as the VisitBritain 'Good to Go' accreditation to recognise Brighton as having adopted UK standardised protocols. Welcoming back influencers and decision makers linked to public relations activity. VisitBrighton will host over 100 press & media visits to experience the city in 2021/22 and write about different elements of the tourism offer such as the dazzling attractions, superior shopping and fabulous food & drink. Media visits will be integral in recovery and partners across the city will support to deliver this activity. The #nevernormalbrighton campaign will be reactivated June-Dec 2021 with a support toolkit to be amplified by city businesses. The specific focus is on high-spend, off-season visitors, encouraging overnight stays and extending short breaks, whilst broadening the offer to encompass the Greater Brighton area.

- **Enhance 'look and feel' of City to encourage repeat, high value visits:**

The Policy & Resources (Recovery) Sub Committee on 29 March 2021 approved the allocation of £1.01M towards the look and feel of the city. Streets most used by visitors have been jet washed and a programme of graffiti removal has been put in place, additional toilets provided at the seafront along with additional waste collection services in this area, in addition staff have been recruited to ensure COVID-safe practices are followed by businesses. The City has received £0.58m from government as a Welcome Back Fund which will help to attract more visitors back to local high streets across the city through communications, events, public information, and temporary public realm change and in general to create additionality to these areas. Use of this fund is being directed by the priorities outlined in the Tourism Recovery Plan.

The Business Improvement District recently re-balloted the businesses in the BID area and on the 7th May the vote was confirmed as positive, this will create stability and ensure the work of the BID continues to enhance the unique retail and leisure offer delivering a thriving, safe, clean and vibrant city centre for residents and visitors alike.

- **Extend season to make Brighton a ‘must visit’ destination for high spend UK and International visitor’s year-round:**

In collaboration with the Cultural Recovery Governance Board and Brighton BID, a year-round citywide events programme is being organised in accordance with COVID regulations, to encourage visitors into the city over a longer period. A Christmas Festival is planned for the month of December, connecting into the Royal Pavilion Estate and the Lanes. A significant piece of work will focus on building back the conference and major business events programme, with a Brighton presence at meetings, conferences and exhibitions both in the UK and internationally. The Brighton Centre is due to reopen in August 2021. Much of the business using the centre which was displaced due to the pandemic has relocated to the Autumn of 2021 and 2022, along with the normal existing annual business already placed in the diary. Therefore the Brighton Centre will be operating with higher event capacity to the end of 2022 at least, which will assist in sustaining numbers of visitors outside of the main visitor months.

3.8 VisitBrighton has supported city businesses through the COVID19 pandemic by developing a Business Support Hub sign-posting business to grants, resources and relevant support available, providing updates on latest government guidance, funding opportunities for business and sharing information and guidance on the latest Alert Levels, and issuing 2-3 newsletters per week to the VisitBrighton tourism business database.

3.9 VisitBrighton developed the highly successful #NeverNormal marketing campaign in 2020. The Never Normal Brighton campaign really captured the spirit of the city in 2020. The campaign has been refreshed for 2021 where there is less emphasis on the pandemic buzzwords and instead a rallying cry to say that if you want a high quality get-away, we know just the place to visit. The tone and the language of the messaging this year will tap into that desire for people to get out and really make the most of post-lockdown life. The campaign will show how the attractions, people and activities on offer presents something different.

4. ANALYSIS & CONSIDERATION OF ANY ALTERNATIVE OPTIONS

4.1 The tourism recovery plan has been carefully considered and consulted upon, taking into account all possible options.

5. COMMUNITY ENGAGEMENT & CONSULTATION

5.1 The Brighton & Hove DEG is a business-led working group providing a collaborative mechanism for monitoring, reviewing, and improving the destination experience, through collective actions. Membership of the DEG is included as Appendix 2. This group is the main route for officers to consult with the tourism sector. In addition, officers attend the Brighton and Hove Economic Partnership, which is a wide grouping of business leaders, including some from the tourism sector. Collectively these groups enable engagement and consultation.

6. CONCLUSION

6.1 The city’s visitor economy, which includes tourism, hospitality, events, attractions and heritage, is widely acknowledged as having been badly damaged by the

pandemic. The plan covered by this report is designed to work alongside other recovery actions, for example those identified by the recovery plan for culture. The plan provides a focus on collective action where businesses and the council work together to benefit the city – protecting jobs and revenues in a sector which generates major employment and enhances the city’s reputation as a premier seaside destination.

7. FINANCIAL & OTHER IMPLICATIONS:

Financial Implications:

- 7.1 There are no direct financial implications arising from the recommendations of this report. The council is utilising government funding to enhance the look and feel of the city and support attracting visitors to the city’s high streets during the recovery period. The visitor economy is critical to the council’s financial position supporting income streams through fees and charges and business rates, and cost avoidance through employment.

Finance Officer Consulted: James Hengeveld *Date: 24/05/21*

Legal Implications:

- 7.2 There are no legal implications in this report which is for noting.

Lawyer Consulted: Alice Rowland *Date: 21/5/21*

Equalities Implications:

- 7.3 None

Sustainability Implications:

- 7.4 None

Brexit Implications:

- 7.5 Unknown

Public Health Implications:

- 7.6 The country moved towards Step 3 of removing lockdown restrictions on the 17th May 2021 which enables travel, including holidays across the UK, allowing people to decide on the appropriate level of risk for their circumstances and most businesses in all but the highest risk sectors were able to reopen.

Step 4 of lockdown easing will not be before 21 June 2021, the government hopes to be in a position to remove all legal limits on social contact.

The Government have always maintained that when implementing the easing of lockdown they will be guided by data, not dates, so that they do not risk a surge in infections that would put unsustainable pressure on the NHS. For that reason, all the dates in the roadmap are indicative and subject to change. There will be a

minimum of five weeks between each step: four weeks for the scientific data to reflect the changes in restrictions and to be analysed; followed by one week's advance notice of the restrictions that will be eased.

Only when the Government is sure that it is safe to move from one step to the next will the final decision be made. The decision will be based on four tests:

- the vaccine deployment programme continues successfully
- evidence shows vaccines are sufficiently effective in reducing hospitalisations and deaths in those vaccinated
- infection rates do not risk a surge in hospitalisations which would put unsustainable pressure on the NHS
- our assessment of the risks is not fundamentally changed by new Variants of Concern

The Government has said it will continue to protect the public by ensuring local outbreaks are managed quickly and effectively and that they combat new dangerous variants, both within the UK and at the border.

Corporate / Citywide Implications:

- 7.7 The city has been deeply affected by the pandemic since the first lockdown commenced in March 2020. The effect on health, wellbeing, the economy and on individual livelihoods has been immense. It may take years for the city to fully recover, for example in lost jobs, accumulated debts and small businesses that have folded. The best route to recovery is through collective action which, via constructive dialogue with stakeholders, has identified a set of recommendations on how best the Brighton & Hove tourism sector can adapt in the changed tourism environment as a result of the crisis.

Most tourism businesses are operating in some form of other, but generally under a nature of reduced capacity, which is having significant impacts on their turnover. As the City moves from step 3 to step 4 of roadmap, if stage 4 of the roadmap is not achieved whereby Government removes all legal limits on social contact, it is likely that this will not be a sustainable situation for hospitality businesses in the short term, and the risk is that as Government support is lifted then liquidity for many businesses will be a significant issue.

SUPPORTING DOCUMENTATION

Appendices:

1. Brighton & Hove Tourism Recovery Plan
2. Destination Experience Group members
3. Brighton & Hove Visitor Economy Strategy 2018-2023