



## BRIEFING PAPER

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# Tourism: statistics and policy

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### Inside:

1. Overseas tourism
2. Inbound visits
3. Outbound tourism
4. Domestic tourism
5. Tourism and the UK economy
6. Brexit and tourism
7. Tourism policy
8. The 'tourism landscape' in England
9. Tourism policy in the devolved nations



# Contents

<b>Summary</b>	<b>3</b>
<b>1. Overseas tourism</b>	<b>4</b>
1.1 Inbound and outbound visitors	4
1.2 Inbound and outbound tourist spending	6
<b>2. Inbound visits</b>	<b>7</b>
2.1 Reasons for visit	7
2.2 Inbound visitor origin	8
2.3 Destination of inbound visits	9
<b>3. Outbound tourism</b>	<b>11</b>
3.1 Reasons for travel	11
3.2 Destination of outbound visits	12
<b>4. Domestic tourism</b>	<b>14</b>
4.1 GB domestic tourism	14
4.2 Reasons for domestic trip	15
4.3 Destination of domestic tourists	16
<b>5. Tourism and the UK economy</b>	<b>17</b>
5.1 Economic output	17
5.2 Employment	18
5.3 International comparisons of tourism employment	19
<b>6. Brexit and tourism</b>	<b>20</b>
6.1 Opportunities	20
6.2 Challenges	21
<b>7. Tourism policy</b>	<b>23</b>
7.1 Tourism Sector Deal	23
<b>8. The ‘tourism landscape’ in England</b>	<b>26</b>
VisitEngland and VisitBritain	26
Inter-ministerial group on tourism	27
Tourism Industry Council	27
Events Industry Board	27
Discover England Fund	28
<b>9. Tourism policy in the devolved nations</b>	<b>28</b>
Scotland	28
Wales	29
Northern Ireland	29

## Summary

This note includes statistics on inbound and outbound visitors to and from the UK, domestic tourism in the UK, the contribution of tourism to the UK economy and the Government's tourism policy.

Between 1980 and 2018, the number of inbound visits to the UK increased by 205%. The number of outbound visits from the UK increased by a greater proportion – 310% over the same period.

From 2017 to 2018, the number of inbound and outbound trips fell.

### Visitor numbers:

- There were 37.9 million inbound visits to the UK in 2018, 3% fewer than in 2017. London was the most popular destination in the UK, attracting 50% of all visits.
- There were 72.8 million outbound visits from the UK, a fall of 1% on 2017. Spain was the most popular destination for UK tourists, attracting 22% of all visits.

There were 118.6 million domestic overnight trips made in Great Britain in 2018, a decline of 2% on the number of domestic visits made in 2017.

### Economic impact:

- In 2016, the economic output (direct GVA) of the tourism industry in the UK was £68 billion, 6% of total UK economic output.
- In 2016, the number of people directly employed in tourism in the UK was 1.5 million, 5% of all employment.
- Between 2015 and 2016, the number of people directly employed in tourism fell by 66,000 or 4.1%

### Tourism policy:

[Sector Deals](#) are partnerships between certain industries and government, created as part of the government's [Industrial Strategy](#). In June 2019, the government announced the [Tourism Sector Deal](#).<sup>1</sup> The aim of the deal is to boost productivity within the tourism sector, develop skills of the UK workforce, and support tourism destinations in the UK.

In the Tourism Sector Deal, the government and sector have committed to actions under the 'five foundations' to help increase visitor numbers in the UK, and enhance their experience, as well as future proof the industry.

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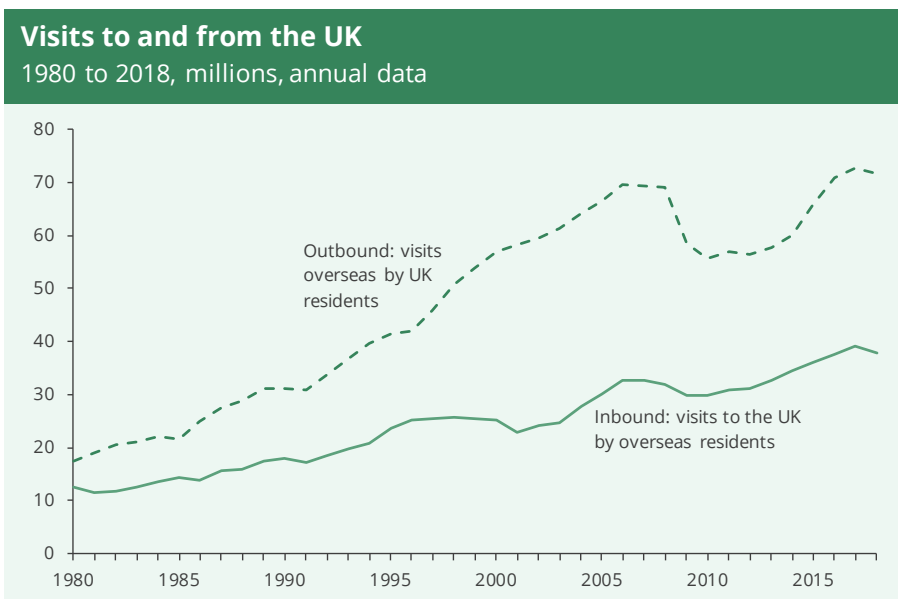
<sup>1</sup> Gov.uk, [PM announces new tourism sector deal](#), 27 June 2019

# 1. Overseas tourism

## 1.1 Inbound and outbound visitors

In 2018, there were 37.9 million visits to the UK by people living abroad, which was a 3% fall compared to 2017.

There were 72.8 million visits abroad by UK residents, which was also lower than the number in 2017; a 1% decline. The chart below shows the trend in inbound and outbound visits to and from the UK since 1980.<sup>2</sup>



There were 37.9 million inbound visits to the UK in 2018, 3% fewer than in 2017. This was the first time the number of overseas visits had decreased since 2010.

Source: ONS, International Passenger Survey, via [Travel Trends: 2018](#), 24 May 2019

Rising prosperity and falling travel costs have led to a boom in overseas tourism since the early 1980s. Between 1980 and 2018, the number of inbound visits to the UK increased by 205%. The number of outbound visits from the UK increased by a greater proportion – 310% over the same period.

The financial crisis of 2008/09 had an impact on both inbound and outbound visitor numbers. The number of outbound visitors from the UK fell particularly steeply – from a peak of 69.5 million in 2006, to 55.6 million in 2010. The number of outbound visitors breached the 2006 peak in 2016.

<sup>2</sup> ONS, [Travel Trends: 2018](#), 24 May 2019

## 5 Tourism: statistics and policy

Inbound visitor numbers were also affected by the financial crisis and its aftermath but to a lesser degree. Inbound visitor numbers fell from 32.8 million in 2007 to 29.8 million in 2010 – a fall of 3.0 million visitors or 9% in three years. The number of inbound visitors has since recovered steadily, surpassing the earlier high in 2014 and had continued to rise, until the fall from 2017 to 2018.

The recent fall in inbound visitor numbers to the UK has been associated with the fall in European visitors.<sup>3</sup> Interest of Europeans to visit the UK since the Brexit Referendum has fallen: from 72% in August 2016 to 64% in March 2019.<sup>4</sup> Patricia Yates, from VisitBritain, has said that there has been an increase of a 'wait and see attitude' among travellers due to

the global economic slowdown, the uncertainty related to the Brexit, as well as geopolitical and trade tensions.<sup>5</sup>

### **Box 1: International tourism statistics: methodology in brief**

Official data on international tourists visiting the UK and UK residents visiting foreign countries comes from the [International Passenger Survey](#) conducted by the Office of National Statistics.

This is a continuously conducted survey which consists of around 300,000 face-to-face interviews a year with people arriving and departing from the major UK airports, sea routes and the Channel Tunnel.

Data from this survey is also used in the provision of migration and population estimates.

International tourism data are published by the ONS annually in [Travel Trends](#) and monthly in [Overseas travel and tourism](#).

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<sup>3</sup> Antonia Wilson, The Guardian, [Tourist numbers to the UK down while global figures continue to rise](#), 22 January 2019

<sup>4</sup> VisitBritain, [Inbound consumer sentiment research](#), April 2019

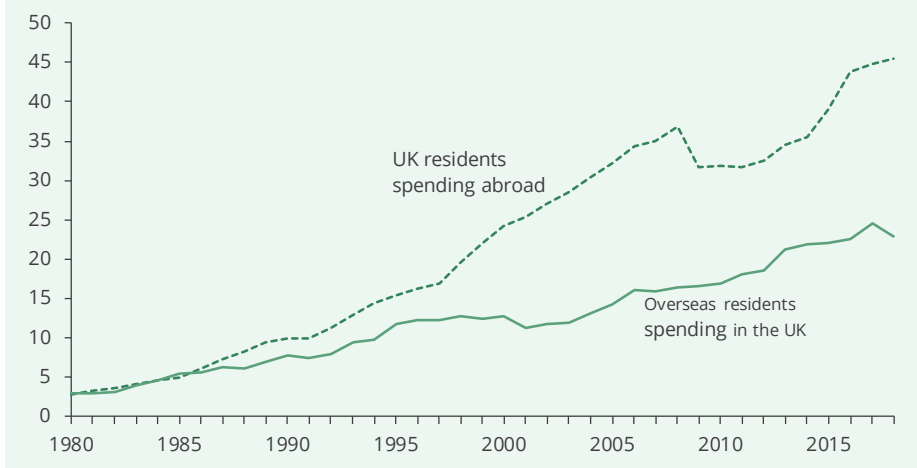
<sup>5</sup> Penny Walker, The Telegraph, [Is Brexit really to blame for a fall in visitor numbers to the UK](#), 23 January 2019

## 1.2 Inbound and outbound tourist spending

The total spend by overseas visitors to the UK in 2018 was £23 billion. This was a fall of 7% from 2017, when the spend was £24.5 billion.

### Tourism spending for visits to and from the UK

1980 to 2018, £ billions



Source: ONS, International Passenger Survey, via [Travel Trends: 2018](#), 24 May 2019

In 2018, the total spend of UK residents abroad was £45.4 billion. This was an increase of 1%, or £595 million from 2017.

## 2. Inbound visits

### 2.1 Reasons for visit

The table below shows the total number of visits to the UK by the reasons for the visit.<sup>6</sup>

Of the 37.9 million visits to the UK in 2018, 40% or 15.1 million were as part of a holiday.

11.8 million, or 31% of trips were made to visit friends or relatives resident in the UK: 8.4 million or 22% were for business reasons and a further 2.6 million were made for other reasons.

Inbound visits to the UK by reason for visit			
2018			
	Millions	% of total	% change 2017 to 2018
Holiday	15.1	40%	-2%
Friends/ relatives	11.8	31%	-2%
Business	8.4	22%	-4%
Miscellaneous	2.6	7%	-16%
<i>Total</i>	37.9		-3%

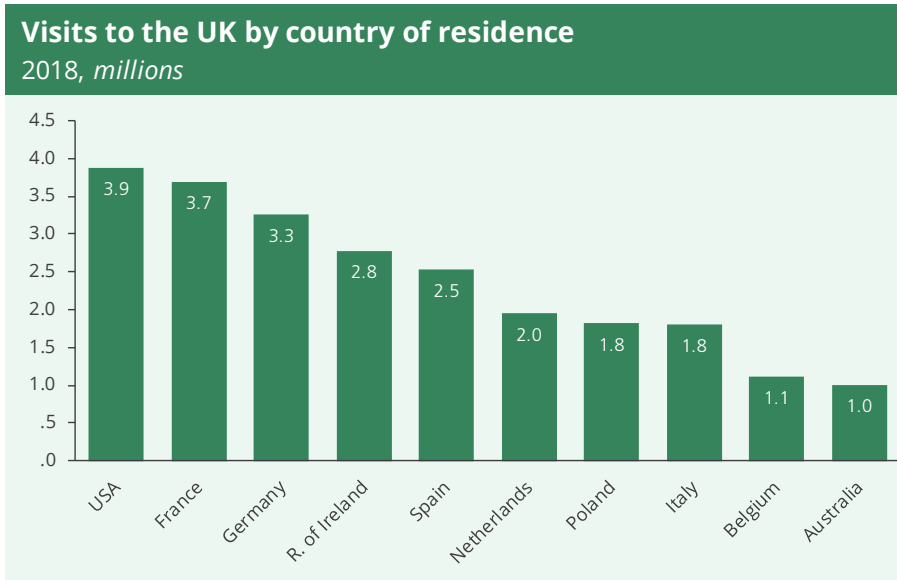
Notes Based on survey responses so subject to some sampling error

Source: ONS, International Passenger Survey, via [Travel Trends: 2018](#), 24 May 2019

<sup>6</sup> Source: ONS, International Passenger Survey, via [Travel Trends: 2018](#), 24 May 2019

## 2.2 Inbound visitor origin

The chart below shows visits to the UK by country of residence in 2018.



Source: ONS, International Passenger Survey, via [Travel Trends: 2018](#), 24 May 2019

Of the visitors to the UK in 2018, 71% were from Europe, 12% were from North America and 16% were from other countries.

French visitors and visitors from the USA each made 10%, and visitors from Germany made 9% of visits to the UK.

In total, foreign visitors to the UK in 2018 spent £22.9 billion, 7% less than 2017. Nearly half of the spend in 2018 (49%) was spent by visitors from the Europe.

Of the 71% of European visitors to the UK, 65% were from EU countries.



Visits to the UK by region of residence				
2018				
	Visits		Total spend (£billion)	Average stay (nights)
	Total (millions)	% of Total		
Europe	27.0	71%	11.3	5
North America	4.7	12%	4.1	8
Other Countries	6.1	16%	7.6	13
<i>Total (whole world)</i>	<i>37.9</i>		<i>22.9</i>	<i>7</i>

Top ten countries by total number of visits to the UK				
2018				
USA	3.9	10%	3.4	7
France	3.7	10%	1.4	5
Germany	3.3	9%	1.5	5
R. of Ireland	2.8	7%	0.9	3
Spain	2.5	7%	1.1	6
Netherlands	2.0	5%	0.7	4
Poland	1.8	5%	0.5	7
Italy	1.8	5%	0.8	5
Belgium	1.1	3%	0.4	4
Australia	1.0	3%	1.0	13

Notes Based on survey responses so subject to some sampling error

Source: ONS, International Passenger Survey, via [Travel Trends: 2018](#), 24 May 2019

## 2.3 Destination of inbound visits

The table below shows visits to the UK by destination in 2018.

Destinations of overseas visitors to the UK				
2018				
	Visits		Total spend (£billion)	Average stay (nights)
	Total (million)	% of total		
England	32.7	86%	19.8	7
Scotland	3.5	9%	2.2	7
Wales	0.9	2%	0.4	7
Northern Ireland	0.4	1%	0.2	6
<i>All visits to the UK</i>	<i>37.9</i>		<i>22.9</i>	<i>7</i>

Top ten areas of the UK visited by overseas residents				
2018				
London	19.1	50%	12.3	6
Lothian (Edinburgh)	2.4	6%	1.1	5
Greater Manchester	1.6	4%	0.7	5
West Midlands	1.4	4%	0.5	7
Kent	1.1	3%	0.3	5
Greater Glasgow	0.9	2%	0.4	6
Merseyside	0.8	2%	0.3	5
East Sussex	0.8	2%	0.3	6
Cambridgeshire	0.7	2%	0.2	7
Oxfordshire	0.7	2%	0.3	7

Notes Based on survey responses so subject to some sampling error

Source: ONS, International Passenger Survey, via [Travel Trends: 2018](#), 24 May 2019

Half of inbound visits to the UK were to London in 2018.

London was the most popular destination for overseas visitors to the UK in 2018. Half of all visits by overseas residents to the UK included London. There were nearly four times as many visits to London than to Scotland, Wales and Northern Ireland combined.

The government’s policy is to encourage overseas visitors to venture out of the capital, as expressed in the [Tourism Sector Deal](#).



Source: ONS, International Passenger Survey, via [Travel Trends: 2018](#), 24 May 2019

## 3. Outbound tourism

### 3.1 Reasons for travel

The table below shows the total number of UK visits abroad by the reasons for visit<sup>7</sup>.

Outbound visits from the UK by reason for visit 2018			
	Millions	% of total	% change 2017 to 2018
Holiday	47.0	66%	1%
Friends/ relatives	16.7	23%	-5%
Business	6.6	9%	-3%
Miscellaneous	1.4	2%	-23%
<i>Total</i>	<i>71.7</i>		<i>-1%</i>

Notes Based on survey responses so subject to some sampling error

Source: ONS, International Passenger Survey, via [Travel Trends: 2018](#), 24 May 2019

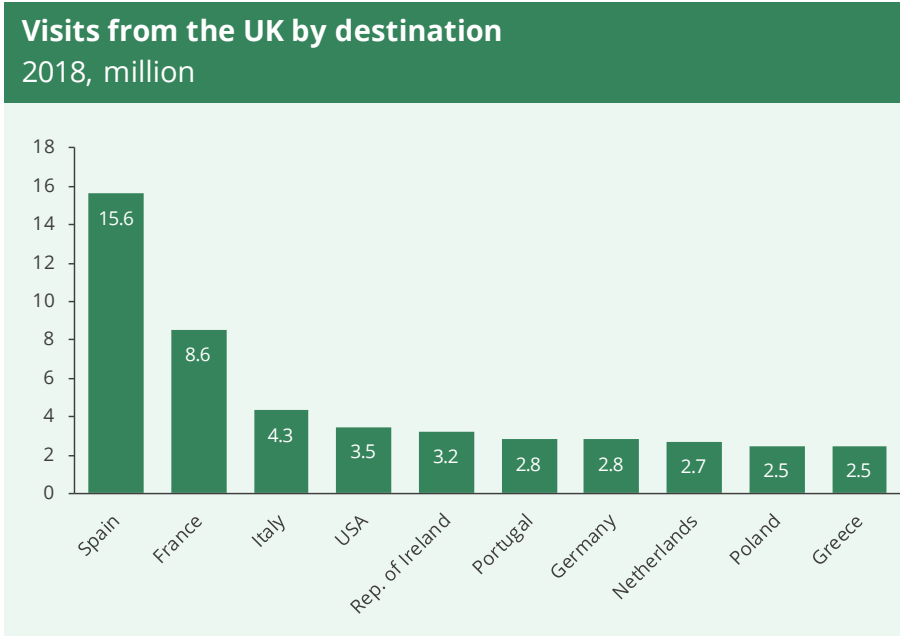
In total, 71.7 million visits were made from the UK to other destinations in 2018, down 1% on 2017.

66% of visits abroad in 2018 were holidays. 23% were to visit friends or relatives and 9% were for business reasons.

<sup>7</sup> Source: ONS, International Passenger Survey, via [Travel Trends: 2018](#), 24 May 2019

## 3.2 Destination of outbound visits

The table below shows outbound visits from the UK by the country of destination.



Source: ONS, International Passenger Survey, via [Travel Trends: 2018](#), 24 May 2019

Over a fifth of UK residents' visits abroad were to Spain in 2018, 15.6 million in total. A further 12% were to France (8.6 million).

The USA was the most visited non-European destination, with 5% of visits.

Of the 10 most popular destinations for overseas visits by UK residents, the longest average stay was in the USA (13 nights on average). Visits to Poland lasted for an average of 10 nights.

80% of overseas visits made by UK residents were to European destinations.

## 13 Tourism: statistics and policy

<b>Outbound visits from the UK by main destination</b>				
2018				
	Visits		Total spend	Average stay
	Total (million)	% of total	(£billion)	(nights)
Europe	57.3	80%	29.6	8
North America	4.0	6%	4.8	13
Other Countries	10.4	15%	11.0	19
<i>Total (whole world)</i>	<i>71.7</i>		<i>45.4</i>	<i>10</i>

<b>Top ten countries by total number of visits from the UK</b>				
2018				
	Visits	% of total	Total spend	Average stay
	(million)		(£billion)	(nights)
Spain	15.6	22%	8.9	9
France	8.6	12%	4.3	7
Italy	4.3	6%	2.6	8
USA	3.5	5%	4.3	13
Rep. of Ireland	3.2	4%	1.0	5
Portugal	2.8	4%	1.5	8
Germany	2.8	4%	1.1	5
Netherlands	2.7	4%	1.0	5
Poland	2.5	3%	0.9	10
Greece	2.5	3%	1.8	9
<i>Total World</i>	<i>71.7</i>		<i>45.4</i>	<i>10</i>

Notes Based on survey responses so subject to some sampling error

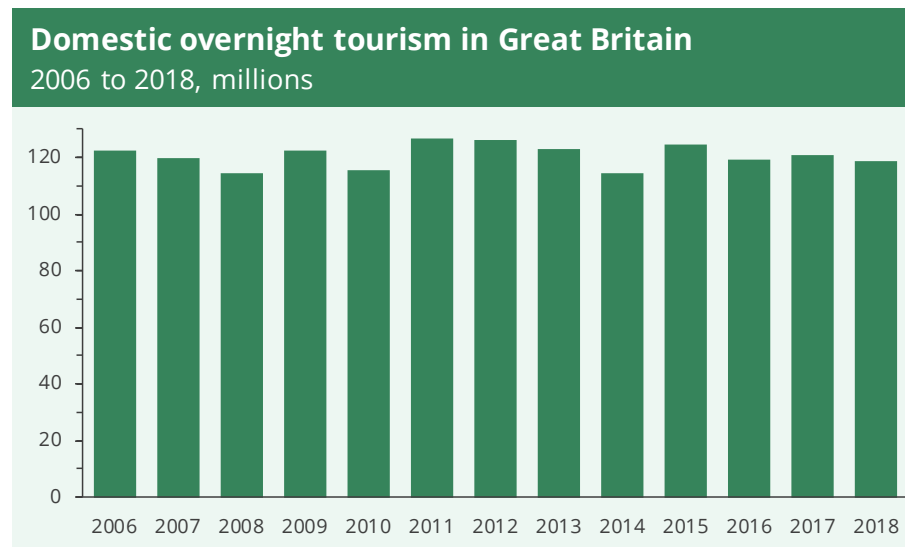
Source: ONS, International Passenger Survey, via [Travel Trends: 2018](#), 24 May 2019

## 4. Domestic tourism

'Domestic tourism' is defined as residents of Great Britain taking trips of one or more nights within Great Britain. Note that one resident taking two trips would count as two trips.

### 4.1 GB domestic tourism

In total, 118.6 million domestic trips were made in 2018, down 2% on the number made in 2017.<sup>8</sup>



In 2018:

118.6 million domestic trips

72.8 million foreign trips by UK residents

Source: VisitBritain, [The GB Tourist 2017 Annual Report](#), August 2018, p21 and VisitBritain, [GB Tourism Survey: 2018 Review](#), p2

Unlike the number of outbound and inbound visits, which have both risen in recent years, the number of domestic trips in Great Britain has, with the exception of 2015, remained flat or has fallen since 2011. From 2006 to 2018, the number of domestic trips in Great Britain has fallen by 4.0 million, or 3%.

Over the past 12 years, the highest number of domestic trips was 126.6 million in 2011, followed by 2012 with 126.0 million trips. However, there were 8% more trips in August 2012 than in August 2011, which may have been boosted by the Olympics.<sup>9</sup>

However, the number of domestic visits was over 50% higher than the number of foreign trips.

<sup>8</sup> Source Visit England, [The GB Tourist 2017](#), page 6

& [GB- All Trip Purposes 2018](#), page 2

<sup>9</sup> VisitBritain, [GB Tourist Statistics 2012](#), June 2013, page 8

## 4.2 Reasons for domestic trip

The table below shows overnight domestic tourism in Great Britain, broken down by reason for trip.

Domestic overnight tourism in GB by reason for trip 2018			
	Visits		Spend (£billions)
	Millions	% of total	
Holiday	57.9	49%	£14.3
Visit friends/relatives	41.1	35%	£4.7
Business	16.3	14%	£4.4
<i>Total</i>	<i>118.6</i>		<i>£24.0</i>

Notes: Based on survey responses so subject to some sampling error  
Includes all trips by GB residents within the Great Britain of one night or more  
Total does not sum due to some respondents not giving reason

Source: VisitBritain, [GB Tourism Survey: 2018 Review](#), p2

49% of all domestic tourism trips were made as part of a holiday in 2018. 35% of trips were to visit friends of relatives and 14% of trips were made for business-related reasons.

## 4.3 Destination of domestic tourists

The table below shows the destination of domestic tourist trips in 2018.

Destination of GB overnight domestic tourism			
2018			
	Visits		Spend (£billions)
	Millions	% of GB total	
England	97.4	82%	£19.3
South West	19.1	16%	£4.3
South East	16.2	14%	£2.7
North West	13.3	11%	£2.7
London	11.9	10%	£3.0
Scotland	11.8	10%	£2.8
Yorkshire and the Humber	10.5	9%	£1.7
Wales	10.0	8%	£1.9
East of England	8.8	7%	£1.6
West Midlands	7.8	7%	£1.3
East Midlands	7.8	7%	£1.2
North East	4.0	3%	£0.8
<i>Great Britain</i>	<i>118.6</i>		<i>£24.0</i>

Notes: Based on survey responses so subject to some sampling error  
Includes all trips by GB residents within the UK of one night or more  
Total does not sum due to some respondents not giving reason

Source: VisitBritain, [GB Tourism Survey: 2018 Review](#), p2,  
Gov.Wales, [Wales Tourism Performance Report: January to December 2018](#), 6 June 2019, p3  
& VisitScotland, [Scotland's Tourism Performance Summary Report 2018](#), May 2019, p2

England accounted for 82% of overnight domestic visits in Great Britain in 2017, compared with 10% in Scotland and 8% in Wales.

Expenditure by domestic overnight tourists in Great Britain totalled £24.0 billion in 2018, up by 1.2% on 2017. 81% of all domestic tourism expenditure occurs in England.

Domestic tourists in Great Britain outnumbered foreign visitors by over three to one in 2017, but spent similar amounts: £23.0 billion by foreign visitors compared with £24.0 billion by domestic tourists.

In 2018:

Domestic tourists  
spent £24.0  
billion

Foreign tourists  
spent £23.0  
billion



## 5. Tourism and the UK economy

### Box 2: Calculating the economic impact of the tourism industry

The contribution of tourism to the economy is not straightforward to calculate. Several industries provide services to tourists, including the accommodation services industry, the food and beverage services industry, and the museums and galleries industry. However, these industries might provide services to local people as well as tourists – for example, a country pub or a museum may serve local people as well as tourists. In addition, some non-tourist related industries provide services to tourists, such as parts of the retail industry.

These issues are addressed by the ONS Tourism Intelligence Unit which disentangles the *total* contribution of tourism related industries from the *direct* contribution made by tourism. The [Tourism Satellite Account](#) (TSA) publishes estimates of economic output related to tourism on this basis.

### 5.1 Economic output

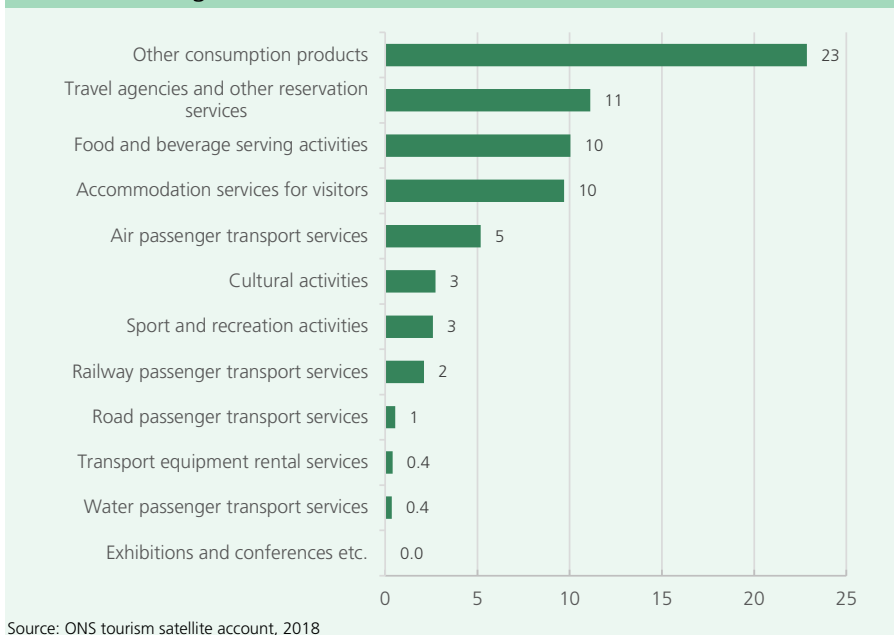
The economic output of the tourist industries grew by less than 1% from 2015 to 2016. The UK economy as a whole grew by 4% over this period.<sup>10</sup>

The economic output of the industries that make up the tourism sector vary considerably. The following chart shows the economic output of these sectors.

In 2016, the economic output of the tourism industry in the UK was £68 billion. This is 6.0% of total UK economic output.

#### Economic output of the tourist industries, 2016

£ billions, direct gross value added



The industry called 'other consumption products' includes all economic activity due to tourism that occurs outside the traditional tourism

<sup>10</sup> ONS, [The UK Tourism Satellite Account \(UK-TSA\): 2016](#), 2018, see data table TDGVA-2016. Economic output is direct Gross Value Added, which is similar to GDP. Total UK economic output is from the [Annual Business Survey](#)

industries. This includes car parking, costs associated with second home ownership, and the purchase by tourists of goods such as clothing.

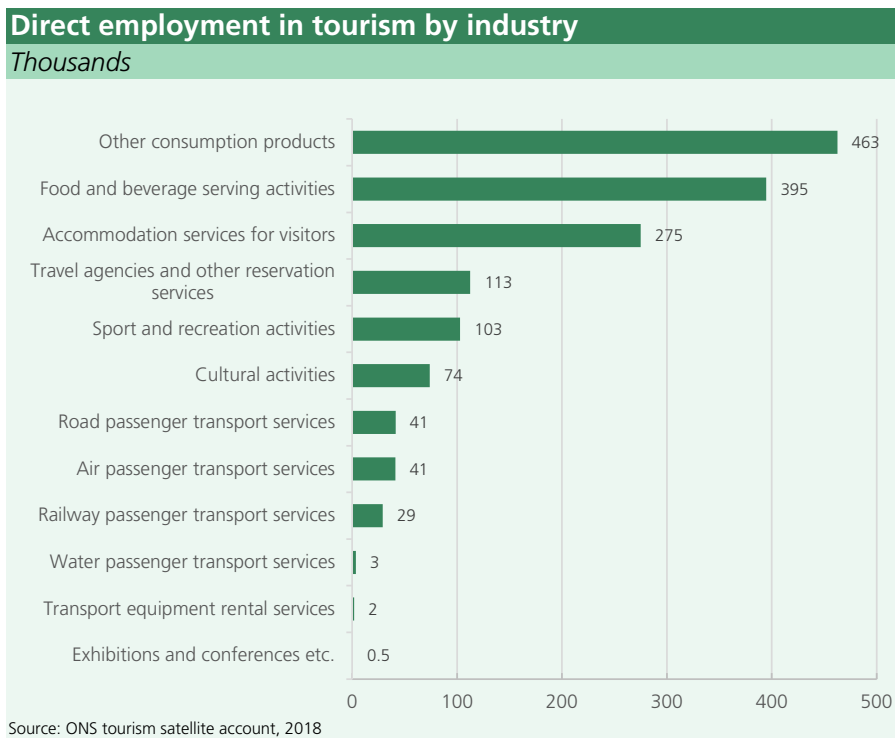
In 2016, the other consumption products category contributed the most to tourism economic output – £23 billion. The travel agencies and other reservations services category contributed £11 billion, the food and beverage service industry contributed £10 billion, the same as the accommodation services industry.

## 5.2 Employment

In 2016, the number of people directly employed in tourism in the UK was 1.5 million, which was 5.0% of all employment in the UK.<sup>11</sup>

Between 2015 and 2016, the number of people directly employed in tourism fell by 66,000 or 4.1%.

The following chart shows direct employment in tourism in each of the tourism industries.



As with economic output, direct tourism employment was largest in the other consumption products industry – 463,000 in 2016.

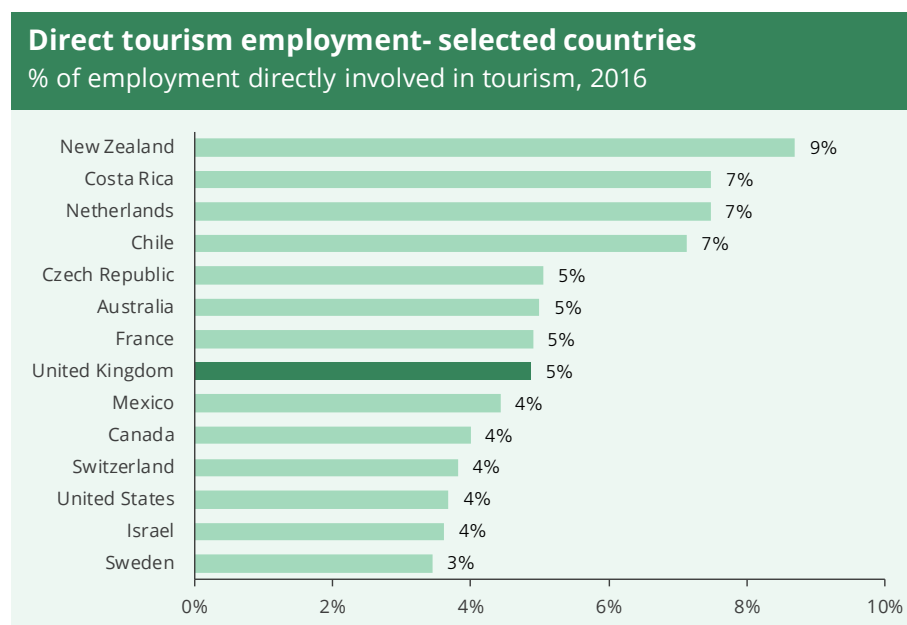
Tourism employment was 395,000 in the food and beverage service industry. In the accommodation services industry, tourism employment was 275,000.

<sup>11</sup> ONS, [The UK Tourism Satellite Account \(UK-TSA\): 2016](#), 2018. See data table T7-2016

## 5.3 International comparisons of tourism employment

Estimates of employment directly involved with tourism are published by the [Organisation for Economic Cooperation and Development \(OECD\)](#).<sup>12</sup>

The following chart shows the proportion of total employment that is directly involved in tourism in selected OECD countries. These data are for 2016.



Source: [OECD data on tourism employment](#)

Of these selected countries, the proportion of employment in the UK that is directly involved with tourism is about average at 5%.

In New Zealand the proportion is considerably higher at 9%.

Tourism employment in the US is 4%, and only 3% in Sweden.

<sup>12</sup> OECD, [Enterprises and employment in tourism](#), 2018

## 6. Brexit and tourism

Below are some of the potential opportunities and challenges created by the UK's decision to leave the EU. Neither list is intended to be completely comprehensive. As the nature of the future relationship between the UK and the EU emerges, the lists will change.

### 6.1 Opportunities

- **Attracting tourists from non-EU countries** – the UK is already popular with tourists from non-EU countries, but Brexit provides an opportunity to exploit these markets to a greater extent. The Department for International Trade is working in non-EU markets to attract trade and foreign investment, partly by marketing the UK as a destination. The GREAT campaign has “dialled up” its campaign in markets such as Australia and Canada, and is working with a wider range of government departments to market the UK.<sup>13</sup>
- Since the EU Referendum in June 2016, the pound has lost its value against the dollar and the euro. A **weaker pound** means that it is generally cheaper for foreign tourists to visit the UK, which will potentially make the UK a more attractive destination for international tourists.
- **Staycations** – if Brexit leads to more complex travel requirements for UK tourists visiting the EU, it is possible that domestic tourism (or ‘staycations’) will increase in popularity. Evidence collected by Travel Weekly website suggests that uncertainty around travel requirements has increased interest in domestic holidays as an alternative to European holidays.<sup>14</sup> A survey by [VoucherCodes](#) revealed 25% of British citizens will cut down on holidays because of Brexit, and 36% will opt to staycation in 2019.<sup>15</sup> The weaker pound (which generally makes travel abroad by UK residents more expensive) may also help to boost the popularity of domestic tourism.
- **Employment in tourism industries** is heavily reliant on employees from other EU countries. In the whole UK economy, 7% of employees are EU27 nationals. In the two biggest tourism industries, this proportion is far higher: 12% in food and beverage service industries, and 19% in accommodation service activities.<sup>16</sup> This reliance on employees from other EU nationals could present an opportunity for more employment of UK nationals in tourism industries, if migration from the EU to the UK falls after Brexit. But this point is arguable – see over the page for the counter-view.

<sup>13</sup> Influence Online, [Can the GREAT Campaign Lead Britain's Soft-Power Drive Post-Brexit?](#), September 2018

<sup>14</sup> Travel Weekly, [Staycations 'set for Brexit boost'](#), October 2018

<sup>15</sup> VoucherCodes, [Wales takes the staycation crown](#), 4 March 2019

<sup>16</sup> ONS, Labour Force Survey, 2016. Quoted in HC Library Briefing Paper, [Employment of other EU nationals in the UK](#), August 2017

## 6.2 Challenges

- Brexit may lead to more **formal barriers between the UK and the EU**, increasing the complexity for tourists traveling across the UK border and ultimately discouraging tourism to and from the UK.
- **The UK is sometimes used by non-EU tourists as a “gateway” to other European countries.** This is particularly true of American tourists. If travel between the UK and the EU is less straightforward than it is now, this market may be impacted. Although it should be noted that the UK and some other EU countries already have different arrangements in place for visitors from third countries, in which case Brexit would have limited impact.<sup>17</sup>
- The DCMS Select Committee found that the possible **loss of funding from the EU** to tourist areas and Destination Management Organisations after Brexit could be “extremely damaging”.<sup>18</sup> EU funding supports the development of marketing strategies for tourist areas, as well as the regeneration of some historically deprived tourist areas. The UK government has guaranteed all funding from the EU until the end of 2020, regardless of whether it concludes a deal with the EU.<sup>19</sup>
- Many areas of **consumer protection** are subject to EU regulations. Brexit could have a major impact on many of these. In some cases the UK government has stated that they will ensure that these protections are rolled over to protect EU and UK consumers in the UK after Brexit, but often the reciprocal rights of UK consumers in the EU are still subject to final agreement with the EU. The consumer rights currently protected in EU law include:<sup>20</sup>
  - Roaming charges have been abolished in the EU for phone data contracts issued in the EU since June 2017. The UK government has indicated that the abolition of roaming charges will still apply in the UK post-Brexit, but it is not yet clear what will happen to charges levied on UK tourists in the EU.<sup>21</sup>
  - The [Package Holiday Directive](#) protects EU consumers in case of the insolvency of their travel agent during their holiday. There is still some debate as to whether the ‘mutual recognition’ of financial protection regimes in different EU states ensured by this Directive will exist after Brexit.<sup>22</sup>
  - The [Consumer Rights Directive](#) ensures a range of protections for EU consumers, including transparent pricing and a 14 day right of withdrawal from many goods and services purchases. Often UK law goes beyond the rights established in EU law, and these are likely to remain for EU tourists visiting the UK after Brexit. But it is not clear if the

<sup>17</sup> Politico, [Commission to airports: prepare for no-deal Brexit](#), June 2017

<sup>18</sup> DCMS Select Committee, [The potential impact of Brexit on the creative industries, tourism and the digital single market](#), January 2018, p24

<sup>19</sup> HC Library Briefing Paper, [UK funding from the EU](#), November 2018

<sup>20</sup> ABTA, [What Brexit might mean for UK travel](#), 2016, p10

<sup>21</sup> HC Library Briefing Paper, [The abolition of roaming charges and Brexit](#), July 2017

<sup>22</sup> Tourism Weekly, [Brexit threat to EU-UK package-travel rules](#), November 2018

reciprocal rights of UK citizens in the EU will be guaranteed after Brexit.<sup>23</sup>

- The European Health Insurance Card (EHIC) is available to all EU citizens and entitles holders to local healthcare services. The [Healthcare \(International Arrangements\) Bill 2017-19](#) (introduced by the government to the House of Commons on 29 November 2018) seeks to establish the basis for a new arrangement allowing the EHIC scheme to continue, subject to an agreement with the EU.
- The **European Common Aviation Area** (ECAA) is the EU's internal aviation market, and allows UK registered airlines to fly without restrictions to other ECAA member states, and *vice versa*. This makes air travel between EU member states straightforward for operators and cheap for consumers. Brexit might mean more restrictions on flights between the UK and other EU states, potentially increasing complexity for operators and prices for consumers. However, the UK government has consistently stated that an air transport agreement can be done with the EU that ensures continued connectivity between the UK and the EU.<sup>24</sup>
- As mentioned earlier in this section, the tourism industries are considerably more reliant on the employment of people from other EU countries than the rest of the economy as a whole.<sup>25</sup> So, if Brexit resulted in lower levels of EU migration to the UK and **fewer EU workers**, this would have a disproportionate effect on the UK tourism sector. If key roles could not be filled, then it is possible that these roles will be taken on by UK workers. But it might be that these vacancies are not filled easily, causing increased demand for tourism workers, pushing up tourism wages resulting in higher costs for domestic and international visitors to the UK, possibly making the UK a less desirable tourism destination.<sup>26</sup> In the final months of 2018, the Chief Executive of UKHospitality Kate Nicholls said "...if hospitality employers do not have access to EU workers, and under the proposed terms they will not, then we will...see more venue closures."<sup>27</sup>

<sup>23</sup> House of Lords EU Justice Sub-Committee, [Brexit: will consumer rights be protected?](#), December 2017, p8

<sup>24</sup> HC Library Briefing Paper, [Brexit and transport](#), November 2018, Section 6

<sup>25</sup> HC Library Briefing Paper, [Employment of other EU nationals in the UK](#), August 2017

<sup>26</sup> DCMS Select Committee, [The potential impact of Brexit on the creative industries, tourism and the digital single market](#), January 2018, p14

<sup>27</sup> [New Government migration proposals will devastate hospitality](#), UKHospitality press notice, 17 December 2018

## 7. Tourism policy

[Sector Deals](#) are partnerships between certain industries and government, created as part of the government's [Industrial Strategy](#). The Deals typically involve a high level council made up of industry leaders and ministers, a competitive fund to encourage R&D and innovative practice in the industry, and measures to support training and recruitment. At time of publishing, there are ten sector deals.

### 7.1 Tourism Sector Deal

In June 2019, the government announced the [Tourism Sector Deal](#).<sup>28</sup> The aim of the deal is to boost productivity within the tourism sector, develop skills of the UK workforce, and support tourism destinations in the UK.

[VisitBritain](#), the national tourism agency, say the deal is a

game-changer for tourism, spelling a step-change in how we underpin the success of tourism for a generation, moving it to the top table as a leading industry for the UK Government's future economic planning.<sup>29</sup>

In the Sector Deal, the government and sector have committed to actions under the 'five foundations' to help increase visitor numbers in the UK, and enhance their experience, as well as future proof the industry.<sup>30</sup> The Five Foundations are ideas, people, infrastructure, business environments, and places.

#### Ideas

Government action:

- Help the British Tourist Authority to develop [Tourism Exchange Great Britain](#) (TXGB). This is a platform for English tourism suppliers to link with distributors with global reach, such as Expedia or Booking.com.
- Provide £40,000 to the Tourism Alliance in England, who have commissioned research into businesses and compliance in the sector.

Sector action:

- Develop a new tourism data hub to help the sector understand the motivation and movement of UK visitors in real time. It will also gather data about why people choose *not* to visit the UK.

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<sup>28</sup> Gov.uk, [PM announces new tourism sector deal](#), 27 June 2019

<sup>29</sup> VisitBritain, [Tourism Sector Deal highlights](#)

<sup>30</sup> The Industrial Strategy has five 'horizontal' policies, referred to as the five foundations of productivity, which should aid the government in meeting the aims of the strategy.

## People

Government action:

- The rollout of two new [T Levels](#): Cultural Heritage and Visitor Attractions, and Catering. T Levels are new courses being introduced from September 2020, offering a mix of classroom and practical learning. The government will also involve the industry in the Post-16 Qualification review, which will help the industry have an impact on future policy.
- Support campaigns which promote apprenticeships and career opportunities, such as [‘Fire It Up’](#)
- The Department for Work and Pensions will continue to work with the hospitality industry to ensure there is still a clear route into the tourism sector.

Sector action:

- Creation of 30,000 new apprenticeship starts in the sector a year by 2025.
- Set up a mentoring programme to support 10,000 employees in the sector. There is also a target to have 80 per cent of the workforce having in-work training.
- There will be a retention and recruitment campaign, funded by a £1million commitment from employers.

## Infrastructure

Government action:

- By developing rail, and through the Aviation and Maritime strategies, travel to and around the UK will be made easier for tourists.
- In August 2019, the government launched a [£250,000 competition](#) for conference centres to apply for funding to improve their broadband infrastructure.
- Invest in Museum, Heritage, and Arts sector projects, in order to improve visitor experiences.
- Develop a new website for the British Tourist Authority, which will have more information on accessibility in the UK.

Sector action:

- 130,000 new hotel rooms to be built by 2025.
- New measures to support the government’s aim of making the UK the most accessible tourism destination in Europe by 2025, such as promotions showing people with accessibility issues, and improved accessibility itineraries online.

## Business environments

Government action:

- The Government launched an [International Business Events Action Plan](#) alongside the sector deal. The plan outlines the strategy of the UK Government to maintain its position as a leading destination for International Business Events in Europe. It is an update to the Government’s Business Visits and Events Strategy.

Sector action:



- The Events Industry Board will advise government on sector policy, and identify key industry areas they can support.

### Places

Government action:

- The government will pilot up to five new Tourism Zones. Areas will become Tourism Zones by a bidding process, and will receive targeted support from the government. This should increase visitor numbers, skills investment, and extend the tourism season. Since the Tourism Sector Deal was announced, areas have already started to put together bids to become a Tourism Zone, such as [North Wales](#), and [Cumbria](#).

Sector action:

- Larger businesses will support smaller ones by offering training and support.
- Businesses, local authorities, and Local Enterprise Partnerships (England) in Tourism Zones will prioritise which areas need extra funding.

Tourism is a **devolved policy area**, so England, Northern Ireland, Scotland, and Wales each have a national tourism board with differing tourism policies. The UK government is able to consult the devolved governments on future project and work. Some competencies of the Tourism Sector Deal, such as visas and immigration, are not devolved.<sup>31</sup>

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<sup>31</sup> HM Government, [Industrial Strategy: Tourism Sector Deal](#), 2019, p12

## 8. The ‘tourism landscape’ in England

The “tourism landscape” is composed of the bodies that market and seek to encourage growth in the value of tourism in the UK.

The tourism landscape in the UK is set out in detail in the Department for Culture Media and Sport (DCMS) paper, [The tourism landscape](#).<sup>32</sup>

The central measures which the Government has taken to “strengthen coordination and collaboration across the tourism landscape” are:

- Change the arrangements governing **VisitBritain and VisitEngland**
- Establish an **Inter-Ministerial Group on Tourism** to hold meetings with between Ministers involved with tourism policy.
- Re-vamp the **Tourism Industry Council** to bring together Government and industry leaders.
- Establish an **Events Industry Board** to enhance UK major events planning and delivery.
- Create a **Discover England fund** to encourage collaboration between ‘destination organisations’ in England

On 27 November, in a press release from DCMS, the Government signaled its intention to deliver a landmark sector deal for the UK tourism industry to attract more domestic and overseas visitors and help drive major economic growth.<sup>33</sup>

### VisitEngland and VisitBritain

VisitEngland and VisitBritain are both parts of the British Tourist Authority, which was established by the [Development of Tourism Act 1969](#).

Following the 2015 Spending Review, the Government clarified the distinction between VisitEngland and VisitBritain and established separate ring-fenced budgets for each organisation.<sup>34</sup>

- **VisitBritain** is responsible for the promotion of Britain as a tourism market (including England, Scotland and Wales) to overseas markets. In 2016/17, its total budget is £51 million.<sup>35</sup>
- **VisitEngland** is responsible for developing tourism in England, including through closer working between local destination organisations. VisitEngland budget in 2015/16 is £17 million.<sup>36</sup>

VisitBritain’s budget is £51 million

VisitEngland’s budget is £17 million

<sup>32</sup> DCMS, [The tourism landscape](#), May 2016

<sup>33</sup> DCMS, [Government signals intention to secure tourism sector deal](#), 27 November 2018

<sup>34</sup> VisitBritain, [Minutes of Board meeting](#), held on 8 December 2015

<sup>35</sup> VisitBritain and VisitEngland, [2016/17 Business Plan](#), p8

<sup>36</sup> *Ibid*

In the [2019 Spending Review](#), the Government settlement for the Department for Digital Culture, Media, and Sport included

- Continuation of the Discover England Fund to promote inbound tourism
- Over £300 million to support national museums and galleries
- £46 million for the Birmingham Commonwealth Games, which is a proportion of the near £600 million the government had committed to the games

### Box 3: GREAT Britain campaign

The GREAT campaign is a marketing campaign to encourage foreign visitors to Great Britain. A number of government agencies are involved in this campaign, including VisitBritain, the Foreign and Commonwealth Office, UK Trade and Investment, UK Visas and Immigration and the British Council. The GREAT campaign budget allocated to VisitBritain from DCMS is £20 million in 2016/17, 39% of VisitBritain's total income.<sup>37</sup>

## Inter-ministerial group on tourism

DCMS is the department with principle responsibility for tourism policy and a tourism minister (currently [Helen Whately MP](#)).

However, tourism cuts across a wide range of policy areas, and so the Government have created the Inter-Ministerial Group on Tourism to facilitate discussions between relevant Ministers from BIS, Home Office, DCLG, DfT, HMT and DEFRA. The group meets quarterly and ministers from the devolved administrations are also invited when relevant matters are discussed.

## Tourism Industry Council

In common with other economically significant industries (such as the [automotive industry](#) and the [construction industry](#)) the tourism industry has a high level council which facilitates discussions between Government and industry leaders.

The [Tourism Industry Council](#) will ensure the Tourism Sector Deal is being delivered. A sub-group of the council, The Hospitality and Tourism Skills Board, will be established and managed by UK Hospitality and the British Beer and Pub Association (BBPA). The Board will oversee the increased number of apprenticeship starts and the new mentoring programme listed in the Sector Deal. This information will feed in to the Council.

The Tourism Industry Council will also task the Skills Board with the aims of the Sector Deal, and will have reports on the progress of the Deal from the Chair of the British Tourist Authority.

## Events Industry Board

The Events Industry Board was set up to implement the [Business visits and events](#) strategy published in March 2015.

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<sup>37</sup> VisitBritain and VisitEngland, [2016/17 Business Plan](#), p8

The [Events Industry Board](#) is tasked with promoting the UK as a destination for major events such as sporting events, major business conferences and international meetings.

### Discover England Fund

Tourism in England is promoted by VisitEngland and also a substantial network of Destination Management Organisations (DMOs), such as the [Cumbria Tourism](#) or [Visit Kent](#). The Culture Media and Sport Select Committee stated that there are “200+” such organisations in England and they come in a “variety of shapes and sizes.”<sup>38</sup>

DMOs rarely have a significant role in the management of their destination, but rather provide information to potential visitors and market the destination.

The new [Discover England Fund](#) is designed to encourage closer cooperation between these organisations. The Fund will be used to develop projects that encourage tourists to visit England, including digital projects that are well integrated with other such projects, widening the choice of destinations presented to tourists.

The Discover England Fund will operate over three years from 2016 to 2019. Funding will be phased over these three years, with £6.5 million awarded in 2016/17, followed by £11.76 million in 2017/18 and £22 million in 2018/19.<sup>39</sup>

## 9. Tourism policy in the devolved nations

This section briefly summarises tourism policy in the devolved nations.

### Scotland

The Scottish Government views tourism as “of vital importance to the Scottish economy.”<sup>40</sup>

[VisitScotland](#) is the national tourism agency for Scotland, charged with marketing Scotland as destination for domestic and international visitors.

The [Scottish Tourism Alliance](#) is an independent trade body representing the Scottish tourism industry. This body is charged with facilitating the strategic growth of tourism in Scotland, including the development of the Scottish tourism strategy, [Tourism 2020](#).

The strategy aims to grow visitor spending by £1 billion by 2020, compared to the 2012 level. 2015 figures show that visitor spending in Scotland had risen by £500 million since 2012.

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<sup>38</sup> Culture, Media and Sport Committee, [Tourism](#), 26 March 2015, HC 614 2014/15 p11

<sup>39</sup> VisitBritain and VisitEngland, [2016/17 Business Plan](#), p7

<sup>40</sup> Scottish Government, [Tourism is everyone's business](#), 2016

The strategy involves the following key policies to achieve this overall aim:<sup>41</sup>

- Strengthen Digital Capabilities
- Strengthen Industry Leadership
- Enhance the Quality of the Visitor Experience
- Influence Investment (specifically flight access & transport connectivity, built infrastructure, digital connectivity and business growth finance)

Data and analysis of tourism in the Scottish regions can be found in the VisitScotland publication [Tourism in Scotland's regions](#).

## Wales

[VisitWales](#) is the Welsh Government's tourism body. It is a body of the Department for Economy, Science and Technology.<sup>42</sup>

The central aim of VisitWales is to increase spending by tourists in Wales by 10% compared with the 2013 level.<sup>43</sup>

VisitWales hopes to achieve this aim by prioritising the following policies:<sup>44</sup>

- Develop tourism activity and specialist markets and secure maximum benefit from major events in our high profile venues.
- Promote Wales as a destination by making a high quality tourism offer.
- Work to extend the tourism season and associated benefits.
- Identify funding opportunities to improve the visitor infrastructure and product in Wales.
- Support investment in staff training and management to support a high quality tourism industry.

[Partnership for Growth: strategy for tourism 2013-2020](#) is the Welsh government's strategy to increase visitor spend to Wales.

## Northern Ireland

Within the Northern Ireland Executive, tourism policy is the responsibility of [the Department for the Economy](#).

The national tourist board in Northern Ireland is [Discover Northern Ireland](#).

The Hunter Review (published in 2013) sought to review and refresh tourism structures in Northern Ireland. The Northern Ireland Executive accepted all of these recommendations (with some minor amendments).

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<sup>41</sup> Scottish Tourism Alliance, [Mid-term review 2016](#), May 2016

<sup>42</sup> Welsh Government, [Tourism strategy: partnership for growth 2013-2020](#), 2013, p5

<sup>43</sup> Welsh Government, [Tourism policy webpage](#), 2016

<sup>44</sup> Welsh Government, [Tourism strategy: partnership for growth 2013-2020](#), 2013, p5

As of May 2016, 22 of the 33 recommendations had been implemented, with action on the remainder “ongoing”.<sup>45</sup>

A useful summary of tourism policy in Northern Ireland has been produced by the Research and Information Service of the Northern Ireland Assembly: [Northern Ireland tourism: structures](#).

Recent statistics on tourism in Northern Ireland may be found on the [NI Department for the Economy](#) website.

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<sup>45</sup> Northern Ireland Executive, Department for the Economy, [Developing tourism strategy and policy in Northern Ireland](#), 2016

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