Final Business and Regulatory Impact Assessment (BRIA)

Title: Scotland's Strategic Framework: Visitor Attractions

Purpose and intended effect:

The objective of Scotland's Strategic Framework is to set out a sustainable response to the pandemic to be implemented until either a vaccine or highly effective treatments to the virus are developed. The Framework covers the four key harms of the virus, how we will work to suppress the virus, and sets out our proposal to move to a strategic approach to outbreak management based on five levels of protection.

This BRIA concerns a range of visitor attractions and relates to the Levels Regulations (the Health Protection (Coronavirus) (Restrictions and Requirements) (Local Levels) (Scotland) Regulations 2020) which came into force on 2 November, and included requirements specifically related to museums and galleries. The Levels Regulations were amended on 20 November 2020 (by the Health Protection (Coronvirus) (Restrictions and Requirements) (Local Levels) (Scotland) Amendment (No. 3) Regulations 2020) to include requirements related to indoor attractions at visitor attractions.

This BRIA is focused on the set of measures within Scotland's Strategic Framework that relate to visitor attractions. (This BRIA does not cover funfairs, which are the subject of a separate BRIA.) However, individual measures need to be viewed within the broader context of the package of measures within each level, with the strategic framework taking a four harms approach to considering which interventions are introduced at each level through assessment of:

- direct health harms associated with COVID-19
- broader health harms
- social harms
- economic harms

The Strategic Framework[1] includes measures across a wide number of settings and provides a comprehensive approach to reducing infection rates and suppressing the spread of the virus. Each of the levels is designed to reflect the relative severity of the area it is being applied to, with progressively heightened restrictions implemented as necessary.

The key measures relating to visitor attractions are set out in the table below:

Visitor Attraction Measures (socialising rules apply)	Level 0 (Baseline)	Level 1	Level 2	Level 3	Level 4
Visitor attractions	Open	Open	Open	Open with protective measures	Closed

Background:

[1] https://www.gov.scot/publications/covid-19-scotlands-strategic-framework/

The UK Coronavirus Act 2020 received Royal Assent on 25 March 2020. The Scottish Government immediately used powers conferred by that Act to bring forward the Health Protection (Coronavirus) (Restrictions) (Scotland) Regulations 2020 ("the first regulations"), to implement physical distancing and impose restrictions on gatherings, events and operation of business activity. They came into force on Thursday 26 March 2020.

The Health Protection (Coronavirus) (Restrictions and Requirements) (Scotland) Regulations 2020 came into force on 14 September 2020 and revoked and replaced the first regulations. They make provision which is substantially similar to the first regulations, as amended at the date on which they were revoked.

On 9 October 2020, the Health Protection (Coronavirus) (Restrictions and Requirements) (Additional Temporary Restrictions) (Scotland) Regulations 2020 ("the additional temporary restrictions") set out additional restrictions, both nationally and specific to the central belt. These regulations suspended the effect of the Health Protection (Coronavirus) (Restrictions and Requirements) (Scotland) Regulations 2020 while the additional temporary restriction regulations were in force. The additional temporary restriction regulations were due to expire on 26 October but were extended by amendment until 6.00 am on 2 November to allow for consultation on the levels-based approach.

The Health Protection (Coronavirus) (Restrictions and Requirements) (Local Levels) (Scotland) Regulations 2020 implement the new Strategic Framework and were published on 30 October and came into force on 2 November. They have since been amended, most recently by the Health Protection (Coronavirus) (Restrictions and Requirements) (Local Levels) (Scotland) Amendment (No. 3) Regulations 2020.

Scotland's Strategic Framework:

Decision-making under the new Strategic Framework system is intended to be straightforward and transparent. It will build on existing structures and processes, will be informed by clinical advisers and evidence, and will continue the engagement with local leadership as decisions to move up and down levels are taken.

Decisions will continue to be made by Ministers, with input from relevant advisers, as implementing the restrictions outlined in the levels is the exercise of a statutory power for the protection of public health, for which Ministers are responsible and accountable.

Regular reviews of the levels system will take place and as soon as Ministers consider that any restriction or requirement is no longer necessary to prevent, protect, control or provide a public health response to the spread of COVID-19, they must revoke that restriction or requirement.

Purpose and intended effect: Scotland's Strategic Framework Visitor Attraction Protections in relation to visitor attractions, including museums and galleries

Introduction

The visitor attraction sector is an important part of Scotland's economy and society and has become more diverse in recent years, reflecting the growth in visitor numbers and wider visitor economy. Within the broader definition of visitor attractions, there are a number of sub-sectors.

These fall across the public, private and third sectors, and sometimes can combine more than one sector, for example public sector attractions that also have charitable status.

Museums and galleries: The museums and galleries sub-sector is an important part of the visitor attraction offer across our cities, towns and also in our rural areas, where a museum or gallery may form the hub for a particular destination. It may also attract additional activity through related craft, or other, businesses.

Distilleries: Distilleries have formed part of the visitor attraction sector in the Highlands and Islands for some time. However, the development of new, and more innovative, visitor centres, including in the Lowlands, and the increasing popularity of gin distilleries and their visitor centres has given this part of the sector a much higher profile in recent times.

Heritage attractions: The sub-sector of heritage attractions, which can include castles, country houses and palaces / sporting venues / railways / arts centres and visitor centres, is the main stay of the attractions sector. The most recent VisitScotland visitor survey indicated that 33% of visitors come to Scotland because of our history and culture

Safari parks, zoo and aquariums: This part of the visitor attraction sector has been an integral part of the tourism offer for a long number of years, for example Edinburgh Zoo and Blair Drummond Safari Park, but has also seen a growth in investment and diversity in more recent times.

Gardens, estates and country parks: Like museums and galleries, a particular garden, estate or country park can form the hub of a particular destination, driving visitor growth and encouraging peripheral activity, such as local cafes and shops.

Guided tours: As an attraction, guided tours can be found in many parts of the country. They can focus on particular topics, activities or geographical locations, and can take a number of forms, including walking tours, bus tours and boat trips, and can attract a range of visitor types, from adventure seekers to older age groups.

Visitor attractions can also combine a variety of elements within a single attraction, and these elements themselves can be classed as indoor, or outdoor, attractions. For the purposes of this BRIA, we will consider visitor attractions as a group, and also the particular measures relating to their indoor and outdoor elements.

The table below summarises available official data on visitor attractions registered for VAT and/or PAYE: This includes some but not all of the sectors outlined above. The visitor attraction sector includes a diverse range of activities and businesses. The table below summaries data relating to some of the biggest sub-sectors within the visitor attractions sector. It is important to note however that this is not an exhaustive listing and does not cover all visitor attractions.

Activity	Registered Enterprises (IDBR, 2019)	Registered Business Sites (IDBR, 2019)[2]	Employment (BRES, 2018)
Museum activities	100	155	4,000
Distilleries[3]	170	280	
Operation of historical sites and buildings and similar visitor attractions	60	135	4,000
Botanical and zoological gardens and nature reserve activities	35	90	2,000
Tour operator activities[4]	180	185	2,250
Activities of tourist guides[5]	50	50	600

However, this may not encompass the full range of premises and employment within these activities, as some may not be registered for PAYE or VAT, and there are substantial numbers of volunteers within the visitor attraction categories set out above.

The Association of Scotland's Visitor Attractions (ASVA), the sector's key Scottish Government stakeholder represents amongst its membership all of the above types of attraction, across the public, private and third sectors.

ASVA represents 481 individual attractions, with 262 member organisations. The sector employs a total paid workforce of around 8,400, with an additional volunteer workforce of close to 8,700[6].

The sector also encompasses a range of different employment types. Around 50% of employees with Museum activities, 44% of employees in Operation of historical sites, and 40% of employees in botanical and zoological gardens in 2019 were estimated to be part-time workers[7].

Museums and galleries are the largest identified sub-sector within the Scottish Government's visitor attractions sector, with 100 registered business at 155 sites[8]. There are over 420 museums in Scotland, 257 of which hold accredited status. The sector ranges from large national institutions employing hundreds of staff to small volunteer-run museums.

[2] Estimated 135 registered business sited with 'museum activities' and 'operation of historical sites…' are within the broader public sector (Source, IDBR).
[3] There are 280 distilleries operating in Scotland, a large number of these have visitor centres and offers distillery tours. We do not have data on the number of jobs these activities support.
[4] Taken to capture aspects of guided tour activities.
[5] Taken to capture aspects of guided tour activities.
[6] Moffat Centre Visitor Attraction Monitor 2019
[7] ONS, BRES.
[8] ONS, IDBR, 2019

The majority of the museums workforce is female, white and with a high level of education[9]. In Scotland 88% of the workforce hold a first degree while 58% hold both a first and second degree. See **Annex A** for additional information on museums and galleries.

The second biggest sub-sector under visitor attractions relates to the operation of **historical sites and buildings**. This sub-sector includes the operation of 60 businesses across 135 sites and employs in the region of 4,000 people. This sector includes major tourist attractions in the central belt such as Edinburgh Castle, Stirling Castle and the Falkirk Wheel to much smaller sites of historical and cultural significance such as Maeshowe and Kilmarten Glen. The sector has a relatively high number of part time employees. Many historical sites and buildings will be open on a seasonal basis. Historical sites and buildings are geographically dispersed across Scotland and include sites within both urban and rural areas. Many of these sites are operated by Historic Environment Scotland. This sub-sector attracts 18m visitors in 2018 (up from 16m in 2016). In 2017-18 Historic Environment Scotland (HES) welcomed over 5m paying visitors and over 7m visitors to unpaid sites, National Trust for Scotland (NTS) welcomed 0.6m paying visitors and over 3m visitors to unpaid sites. The heritage sector as a whole generates £4.2bn for Scotland's economy in 2017 (increased from £3.4bn in 2014), and supports 66K full time-equivalent jobs (direct and induced) in 2017 (increased from 55K in 2014). This includes the contribution from visitor attractions but also the wider sector which includes construction, archaeology etc

There are 170 registered **distillery businesses** operating in Scotland. The majority of those produce whiskey. However, over 60 of Scotland's distilleries produce gin. Distilleries are particularly popular with tourists and there are a number of tour operators who run specialist trips to distilleries (often visiting multiple distilleries within a single day). Many of Scotland's distilleries also have a visitor centre with gift shops and provide tours and demonstrations for visitors. Some distilleries also have bars and cafes. Given the range of activities undertaken at distilleries we do not have specific data on the number of people employed within visitor attractions at distilleries. Distilleries are heavily geographically concentrated in the Highlands and Islands and are important to the rural economy. For the first time, in 2018 there were over 2m visits to distilleries - an increase of 6.1% year on year and 56% more than in 2010. Total spend during that year was £68.32m, up by 12.2% on 2017 (and up from £27m in 2010) and average spend was £34.08, up by 5.8%.

The sub-sector relating to **botanical and zoological gardens and nature reserves** also includes gardens, estates and country parks. Data from the IDBR estimates there 35 businesses operating within this sector, employing around 2,000 people. This category includes Edinburgh Zoo, the Highland Wildlife Park and Blair Drummond Safari and Adventure Park. Visit Scotland state there are over 400 gardens, woodlands and plant nurseries to visit in Scotland. Many of these will include both indoor and outdoor spaces. Visitor attractions range in scale from the 4 botanical gardens (at Benmore, Dawyck, Logan and Edinburgh) and National Trust gardens to much smaller gardens and country parks. This sub-sector draws heavily on the skills, experience and enthusiasm of volunteers

It is estimated that there are around 2,850 people working within the **tour operator and tourist guide sub-sector of visitor attractions**. The majority of these people, 2,250 are employed within tour operator related activities. This sub-sector comprises around 230 separate business operating over a large number of sites. This subsector is heavily dependent on international tourism. This sector includes a diverse range of activity from walking and cycling tours to bus

[9] https://www.museumsgalleriesscotland.org.uk/media/1242/character-matters-full-report.pdf

tours and boat trips. Some of the activities within this sub-sector are also likely to be subject to the travel restrictions within the Strategic Framework.

COVID-19 and visitor attractions

From March 2020, all visitor attractions were required to close, but they have been able to reopen from 15 July, subject to following relevant guidance, including physical distancing, advanced booked, and enhanced hygiene measures[10].

In August 2020, a survey was undertaken by the Moffatt Centre on the impact of Covid-19 on visitor attractions. The online survey was sent out by email to 776 Scottish visitor attractions with respondents being asked to provide data in relation to the impact of Covid-19 on their attraction(s). A total of 359 surveys were completed over a fifteen-day period in September/October 2020, which equates to a 46.3% response rate.[11]

Of the 359 respondents who were asked if their attraction was open prior to lockdown, 64.9% of respondents stated that their attraction was open, with just over a third indicating that their attraction was closed prior to lockdown. During lockdown all visitor attractions were required to close, but they have been able to reopen from 15 July, subject to following the guidance[12]. The majority of visitor attractions (64.3%) have re-opened with just over a fifth opening fully. Of those that have re-opened, two thirds have done so partially (42.9%) and just over a third of attractions (34.3%) have not re-opened. Of respondents stated that their attraction was open prior to lockdown, over three quarters have now re-opened post lockdown, however just over a fifth of attractions open prior to lockdown have indicated they have not re-opened. Over 80% of the respondents had opened by the end of August. Of the 123 respondents had not re-opened their attraction, the key factor for not re-opening in 2020 was due to it being not economically viable. Seasonality is an important issue for Scottish tourism. Just over a third of respondents identified their attraction as seasonal, just over half of seasonal attractions did not re-open. Of those that did re-open, just over a quarter stated they had extended their season, with the majority looking to extend between 1 and 2 months.

All respondents were asked if they believe their attractions are currently operating at an economically sustainable level. Of the 213 who responded, just under two thirds of the attractions stated they did not feel that they were at a sustainable level. Just over a third of respondents had spent between £1,000 and £4,999 in making their premises Covid-safe. In relation to maximum capacity with current physical distancing restrictions in place, of the 179 respondents that answered this question, just under 80% were working at capacities of 50% and under.

In relation to visitor numbers, of the 201 respondents, just under a third had welcomed up to 10% of the visitors when comparing their numbers to the same period in 2019. 13% of respondents stated that visitor numbers in 2020 were between 91% and 100% compared to 2019 with 3% of attractions seeing an increase in overall visitor numbers. In terms of turnover, two thirds of respondents had seen a decline in turnover of 50% or more when compared to 2019. Only 1% of respondents had seen an increase of comparative total turnover.

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[10] https://www.gov.scot/publications/coronavirus-covid-19-tourism-and-hospitality-sector-guidance/pages/overview/

[11] https://www.moffatcentre.com/visitorattractionreports/

[12] https://www.gov.scot/publications/coronavirus-covid-19-guidance-for-museums-galleries-and-heritage-attractions/

In terms of employment, 63.8% of respondents confirmed that they are or have used the Coronavirus Job Retention Scheme. It should be noted that this was prior to the subsequent announcement by the UK Chancellor that the scheme would be extended until March 2021.

Just over a third (38.1%) of respondents benefited from Government-led coronavirus funding, with only 17.9% benefiting from other funding support. Of the 75 visitor attractions that received Government-led funding over two thirds found it Essential/Very beneficial in sustaining their business. This increased to 80% for those businesses that received other funding. Of those visitor attractions that did not receive any type of funding, approximately 60% were not eligible. Of the 256 respondents, just under 50% believe their business is secure in the short term. However, this number significantly declines to under 25% when looking at the long term security of the business.

There has been a significant impact on all types of staffing levels. Survey results further highlighted that many unpaid volunteers were in the 'Shielding' or 'high risk' groups and therefore it was not viable to utilise this group of staff. There had been a 15% reduction in full-time permanent staff, (16% for those working part-time). There had also been a 41% reduction in full-time seasonal staff (54% part-time), as well as a 26% reduction in volunteers. Of the 263 respondents who answered this question, 31 business (11.8%) had made redundancies. This totalled 503 staff. The vast majority of respondents do not envisage making any future redundancies.

In respect of mitigations, respondents were asked if they would use an on-line booking system when they open. Over a half of the attractions (114) stated that they are using such systems, whilst the remainder of respondents (95) stated that they are not using an on-line booking system. Of the 114 respondents using the on-line booking system, over half stated that between 75% and 100% visitors were using the on-line facility. The same percentage of respondents stated that those booking on-line were booking less than a week prior to the visit. It could be surmised that uncertainty owing to the rapidly changing picture with regards to Covid-19 Guidelines, often announced at short notice, plays a significant role in the short lead time for bookings. Of the respondents who did not have an on-line booking system, over a third did not have the technical expertise or the monies to implement it, whilst over 40% of respondents do not see the need for this type of system.

In terms of geographical location, the Highland Local Authority submitted the highest number of responses (42) and also had the highest percentage (11.9%) of attractions that have re-opened again in 2020. The Local Authority area of Dumfries & Galloway had the highest percentage (3.4%) of attractions not opening again in 2020.

Policy Objective

The objective of the restrictions set out within the Strategic Framework is to ensure that the operation of visitor attractions is appropriate to the level of COVID-19 risk within the Local Authority area, also taking into account the other restrictions in place. Any restrictions on operations are intended to help control and suppress the spread of the virus, ultimately minimising transmission rates, hospital admissions, deaths and the potential overwhelming of the NHS.

Transmission

SARS-CoV-2 can be transmitted by three main routes: close-range respiratory droplets and aerosols, longer range respiratory aerosols, and direct contact with surfaces contaminated with virus. Transmission is strongly associated with proximity and duration of contact in indoor environments. It is possible for SARS-CoV-2 to be transmitted at distances of more than 2 metres.[13]

We know from contact tracing, international evidence and scientific research that a wide range of social, residential and workplace settings have been associated with transmission. The highest risks of transmission, including those from super-spreading events, are associated with poorly ventilated and crowded indoor settings with increased likelihood of aerosol emission and where no face coverings are worn such as bars, nightclubs, parties/family gatherings, indoor dining, gyms and exercise classes, and some visitor attractions. Poor ventilation and crowding have been suggested to be factors in numerous transmission clusters[14,15].

The Government recognises that transmission of the virus within households presents the highest risk, which is why gatherings in private dwellings was targeted first and will be restricted across all of the 5 levels.

However, other settings also have the potential to transmit the virus due to the risk factors. Understanding settings where multiple risk factors come together, and large outbreaks are likely to occur, is important in controlling the epidemic.

High-risk factors associated with transmission of the virus[16] include indoor spaces, where ventilation and physical distancing may be less easy to maintain, and places where people come together to spend prolonged periods of time (more than 15 minutes) in close proximity, enabling the virus to spread easily from person to person.
Risks are further compounded by speaking loudly, and when a 2m distance cannot be maintained, as evidence suggests that 1m distancing carries between 2 and 10 times the risk of 2m distancing[17].

The risk factors identified are particularly relevant across visitor attractions, potentially resulting in high risks of transmission.

Visitor attractions by their very nature result in high visitor numbers, with visitor attractions generally places where people come together and gather in close proximity for extended periods, thereby enabling the virus to spread easily from person to person.

Physical distancing may be less easy to maintain in some visitor attractions. Depending on the venue, issues associated with the ventilation of spaces (with recirculation of air being particularly problematic) and pinch points and bottlenecks (at entrances, exits and toilets) all contribute to increasing the risk of transmission.

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[13] Transmission of SARS-CoV-2 and Mitigating Measures, SAGE EMG June 2020

[14] Leclerc QJ FN, Knight LE. What settings have been linked to SARS-CoV-2 transmission clusters? [version 1; peer review: 1 approved with reservations]. Wellcome Open Res **2020**; 5:83

[15] Dillon Adam PW, Jessica Wong et al. Clustering and superspreading potential of severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2) infections in Hong Kong

[16] COVID-19: NOTE BY THE CHIEF MEDICAL OFFICER, CHIEF NURSING OFFICER AND NATIONAL CLINICAL DIRECTOR 7th October 2020

[17] Transmission of SARS-CoV-2 and Mitigating Measures, SAGE EMG June 2020

Additionally, depending on the venue, time spent at visitor attractions will likely increase the amount of time spent indoors, and the likelihood of touching interactive surfaces and objects also increases the risk of transmission. Keeping surfaces clean and regulating the movement of people throughout visitor attractions presents a challenge.

Risks outdoors are lower, with the risk of aerosol transmission considered to be very low outdoors due to high dilution of virus carrying aerosols and UV inactivation of the virus. The virus is not likely to survive for long periods of time on outdoor surfaces in sunlight, although it may survive for more than 24 hours in indoor environments. Outdoors, face to-face exposure (e.g. ≤2m for a prolonged period) should still be considered a potential risk for transmission via respiratory droplets. [18]

Many of the high risk factors for transmission are therefore present in visitor attractions:

- close and prolonged contact (more than 15 minutes) indoors amongst people from different households
- crowding and the ability to regulate the distance between people
- the likelihood of pinch points where adults and children might gather (e.g. toilets and corridors, entrances and exits),
- the likelihood of people touching surfaces and equipment and issues keeping facilities clean
- Mixing of age groups, particularly where older children or adults are indoors[19]

Current position of visitor attractions

ASVA has received reports from members advising that refunds for pre-purchased tickets are now being requested by customers who were planning to travel to visitor attractions, and a number are questioning whether it is viable to remain open when the potential catchment of visitors is very small.

There are also concerns about the level of funding support available to businesses impacted by restrictions set out in the Strategic Framework. With regards to the level of support and how long it will last, attractions have fixed costs often well in excess of the level of support being offered. There are concerns that the impact of the Strategic Framework restrictions will limit visitors to such an extent that the support offered is likely to be insufficient.

In common with other businesses, visitor attractions will be eligible for new £48 million support fund to support employees and businesses impacted by Strategic Framework Restrictions, if they are required to close by law, or are directly impacted by closures.

[18] Transmission of SARS-CoV-2 and Mitigating Measures, SAGE EMG June 2020

[19] https://www.gov.scot/binaries/content/documents/govscot/publications/research-and-analysis/2020/10/coronavirus-covid-19-children-and-transmission/documents/coronavirus-covid-19-children-and-transmission---report-from-the-advisory-sub-group-on-education-and-childrens-issues/coronavirus-covid-19-children-and-transmission---report-from-the-advisory-sub-group-on-education-and-childrens-issues/govscot%3Adocument/Coronavirus%2B%2528COVID-19%2529%2B-%2Bchildren%2Band%2Btransmission%2B-%2Breport%2Bfrom%2Bthe%2BAdvisory%2BSub-Group%2Bon%2BEducation%2Band%2BChildren%25E2%2580%2599s%2BIssues.pdf

Mitigations at visitor attractions include limiting visitor numbers through pre-booking of timed tickets to stagger entry and exit times and to prevent bottlenecks, provision of increased capacity for spaced queuing, physical distancing within venues, highlighted by clear signage and distance markings to manage visitor flow including through use of one way systems. There are also increased ventilation requirements. Risk assessments are required before any premises are able to reopen and are used to identify where increase hygiene measures, increased cleaning, and PPE provision should be provided.

Strong compliance has been reported by the sector to the mitigations set out in the guidance.

Conclusion

Limiting social mixing as much as possible in all settings, including within visitor attractions, is the most effective measure against transmission of the virus.

Our collective effort and sacrifices suppressed the virus to low levels during the summer. That came at a cost to education and learning, health and care services. We recognise and take account of these wider risks, particularly the critical twin risks in health of a second wave potentially coinciding with the seasonal flu, and the wider pressures that the winter period brings, impacting across health and social care. While taking difficult decisions to suppress the virus, we continue to weigh this against the potential mental and physical health, social and developmental harm that may be caused by any measures.

We know there will be significant financial hardships and risks for businesses as a result of any further protective measures that minimise the wider harm to our health and wellbeing as well as minimising the wider social and economic harms. The levels approach sets out proportionate action to address the harm from the virus whilst acknowledging the wider health, social and economic harms. When the risk of Covid rises, so too will the protective measures in these sectors. Similarly as the risk falls, the protective measures will ease.

It is widely recognised that wider health and wellbeing is impacted by our ability to mix with other people. The effects of loneliness are profound and increased markedly during lock down, alongside big increases in mental health problems. The limitations on visitor attractions are part of an overall system to balance suppression of the virus whilst minimising wider harm to our health and wellbeing as well as minimising the wider social and economic harms associated with the measures.

Across all of the five levels we seek to balance:

- The positive impact on the transmission rate of the virus through restricting the opportunity for mixing in settings in visitor attractions
- Enabling as much of the sector as possible to remain open safely, in ways that enable visitor attractions to remain viable and reduce the likelihood of redundancies
- The important role that visitor attractions play in maintaining our wellbeing
- The risk of people gathering elsewhere in less safe environments.

Consultation

Public Consultation:
No (precluded by urgent implementation timescales).

Business:
Given the need to respond quickly to protect public health as virus rates increase, there has not been time to undertake thorough engagement with visitor attractions on the Strategic Framework and these Regulations. However there has been direct engagement with the Association of Scottish Visitor Attractions (ASVA) and Museums Galleries Scotland (MGS) and the National Collections on the Strategic Framework. The Scottish Government will continue to regularly engage with the wider sector on these measures.

The Strategic Framework sets out that visitor attractions are open in levels 0, 1 and 2, and open with protective measures in level 3. Museums and galleries and all indoor attractions at visitor attractions are closed in level 4, but outdoor attractions may remain open.

During our engagement with the Association of Scottish Visitor Attractions (ASVA) and museums and galleries, there was several communications whereby the sector requested to be classified in the same category as public buildings (as libraries are) rather than visitor attractions, so they could then be “Open with protective measures” within level 3. We listened to the queries raised and considered this further and as a result the published levels information revised visitor attractions, which includes museums and galleries, in level 3 to “Open with protective measures”. Being able to be open in level 3 was the main concern raised by museums and galleries.

They have also highlighted that the travel guidance within level 3, whereby people should only travel outwith their local authority for essential purposes, mean that visitor numbers are severely reduced, resulting in many museums considering closure over the winter months. We maintain regular contact with the sector via MGS to understand the impacts that they are facing. Discussions with the sector suggest that the extension for the Coronavirus Job Retention Scheme (CJRS) has resulted in more museums considering closure until January, as the majority of staff wages can be covered by the CJRS. We maintain regular contact with the sector via ASVA to understand the impacts that they are facing.

Options:

A range of options have been considered, and we continue to work constructively with the industry to explore and assess alternatives. This section sets out some of the options considered.

Across all Levels there are a number of mitigating actions required including:

- wearing of facemasks
- social gathering rules
- enhanced hygiene and cleaning measures
- a requirement to carry out risk assessments
- limiting the number of visitors at one time so this can maintain physical distancing for the setting
- clear marking of two metre boundaries
- Signage should be used to communicate key health and safety points, such as hygiene
- staggering entry and exit times to prevent bottlenecks arising as people arrive or leave
- introduce a one-way system at entry and exit points, and throughout the public areas if possible.
- Implementing queue management systems

If the visitor attraction, museum or gallery has a retail or hospitality offering, then the relevant mitigations for that sector must be followed:

- eating and drinking while seated at tables is required at all levels
- wearing of facemasks
- adherence to the additional protective measures in place for hospitality and retail in Level 3, including restrictions on alcohol sales and shorter opening times

Sectors and groups affected

These Regulations will affect:

- Museums and galleries
- Indoor attractions at visitor attractions

The key measures which will affect museums and galleries and indoor attractions at visitor attractions, under the levels of the Strategic Framework, are presented in the table below:

Level 0 (Baseline)	**Level 1**	**Level 2**	**Level 3**	**Level 4**
Open	Open	Open	Open with protective measures	Visitor attractions closed

Many visitor attractions, have hospitality offerings so those may be negatively affected by the restrictions in levels 1-4. There is a separate BRIA for Hospitality, but the key measures which affect the hospitality sector are presented in this table:.

Hospitality Measures (socialising rules apply)	**Level 0 (Baseline)**	**Level 1**	**Level 2**	**Level 3**	**Level 4**
Hospitality (restaurants, cafes, bars, public houses) – indoors	Licensing times apply	2130 Last Entry 2230 Closed	Alcohol only with main meal 1900 Last Entry 2000 Closed 'Wet pubs' closed	No alcohol 1700 Last Entry 1800 Closed 'Wet pubs' closed	Closed
Hospitality (restaurants, cafes, bars, public houses) – outdoors	Licensing times apply	2130 Last Entry 2230 Closed	2130 Last Entry 2230 Closed 'Wet pubs' closed	No alcohol 1700 Last Entry 1800 Closed 'Wet pubs' closed	Closed

<u>Our approach to assessing options</u>

Within this BRIA we have compared the package of measures within each level against the baseline approach of level 0. This has allowed us to present the clinical evidence for intervention at each level setting out the health benefits, whilst acknowledging the potential impacts on visitor attractions. We have also set out some other key options considered at each level. Throughout these measures we have sought to develop the right package of measures to reduce circulation of the virus whilst limiting wider health, economic and social harms.

Our objective is to get all parts of the country to level 0 or level 1 and remain there if we can. Within these levels, we would expect to see low incidence of the virus with isolated clusters, and low community transmission. Broadly, these levels are the closest we can get to normality without a vaccine or effective treatment which would allow us to move to Phase 4 of the Route Map and then back to normality. They would be similar to the measures in place during the summer, once we reached Phase 3. The Baseline and Level 1 are designed to be sustainable for longer periods.

In assessing the relevant options for each level we considered current and previous restrictions, international best-practice and examples, clinical and sectoral input, and proposals from policy colleagues, industry, and experts. We analysed the relative impact of each of the options on the spread of the virus, as well as the additional costs and benefits.

Level 0

The Baseline (Level 0) is designed to be sustainable for longer periods. Within this level, we would expect to see very low incidence of the virus with isolated clusters, and low community transmission. Broadly, this level is the closest we can get to normality, without a vaccine of effective treatment in place. The Baseline is similar to what was in place before 9 October, when physical distancing, and enhanced hygiene measures were in place.

Option 1: All visitor attractions are open, with mitigating measures in place (Baseline)

Option 1 (the Baseline) involves the opening of all indoor and outdoor attractions, subject to guidance and mitigations in place (physical distancing and hygiene measures in place; check in advance for visiting arrangements such as pre-bookable time slots; face coverings indoors are compulsory for all visitors and staff; no meetings socially at a visitor attraction in a group of more than 6 people from 2 separate households outdoors or indoors).

With Option 1, all visitor attractions can open as long as they follow the mitigating actions set out in the guidance and summarised above. Physical distancing requirements and other mitigating actions will reduce transmission rates and therefore enables visitor attractions to open at level 1. This does however reduce the numbers of visitors that can be in the attraction at any one time. This may reduce the revenue that can be generated by a visitor attraction. Staff costs will be an important factor as there will need to be sufficient visitor services / front of house staff and cleaning staff to ensure the attraction can operate in accordance with the guidance, which may require more staff than would have previously been needed. The attractions may also need to be adapted to ensure that physical distancing and hygiene measures can be followed, for example by installing screens and hand sanitation stations, and marking one way visitor flows. It is a decision for individual organisations to make as to whether they can operate in a financially viable manner with these mitigations in place. However, by remaining open, attractions will be able to provide some safe and much needed social interaction and opportunities, which will have both physical and mental wellbeing benefits, as well as providing some financial relief to the sector, which has been hard hit by the impact of the virus. It will ensure reduce levels of job losses in the sector and ensure more attractions are able to survive the season.

As set out in the introductory section, the visitor attractions sector has a high level of volunteers. Volunteering is known to have positive benefits on mental wellbeing and loneliness and social isolation. Allowing visitor attractions to open with mitigating measures in place will potentially allow people to continue to volunteer.

Conclusion

At Level 0 (the Baseline), the opening of all visitor attractions, with mitigating measures, would allow the sector to operate at the maximum level of economic sustainability whilst also containing the transmission of the virus. The sector would still be impacted by the mitigating measures put in place, such as physical distancing and reduced visitor numbers, as well as the impact of related measures and guidance incidental to the operation of attractions.

Levels 1 and 2

Level 1 is designed to be sustainable for longer periods. Within this level, we would expect to see very low incidence of the virus with isolated clusters, and low community transmission.

Within Level 2, we would expect to see increased incidence of the virus, with multiple clusters and increased community transmission. There would be a graduated series of protective measures to tackle the virus, focusing on key areas of risk – broadly, indoor settings where household mixing takes place with less, or less well-observed, physical distancing and mitigations. The measures would be intended to be in place for limited periods and only for as long as required to get the virus down to a low, sustainable level.

Option 1: Baseline

Option 1 (the Baseline) involves the opening of all indoor and outdoor attractions, subject to guidance and mitigations in place as outlined above at Level 0.

Option 2: Close indoor visitor attractions

Option 2 involves the closure of all indoor visitor attractions. This means that all those attractions, or elements of attractions, that operate indoors would be required to close. Those attractions, or parts of attractions, which operate outdoors, would remain open.

By closing indoor attractions, this would serve to reduce the remaining transmission risks that were not eliminated through mitigations put in place but allow continued benefits for health, wellbeing and economic viability by allowing outdoor attractions to remain open.

Closure of indoor attractions would, however, reduce further visitor numbers and sustainability, this impacting on current, and future, economic viability. It will also have a negative impact on socialisation and general wellbeing, increasing the risks of harm from social isolation and loneliness and people lose access to settings to socialise.

Option 3: Close all indoor and outdoor visitor attractions

This option would see the closure of all types of visitor attraction. Closure (as part of a broader package of closures across business areas where transmission is likely to occur) would have the most significant positive impact on transmission rates and spread of the virus. It would significantly reduce opportunities for people to meet in areas which are characterised by many of the high-risk factors associated with transmission of the virus identified by scientific evidence and modelling.

Closure of all attractions for any significant period would, however, reduce visitor numbers to zero and thus have a detrimental impact on attraction income, which will be unlikely to meet fixed costs and could lead to severe levels of job losses in the sector. Future viability of the attractions sector as whole could also be affected, with attendant impact on Scotland's wider tourism sector.

Closure would also have a negative impact on socialisation and general wellbeing as people would not be able to meet in visitor attractions, increasing the risks of harm from social isolation and loneliness and people lose access to settings to socialise.

Options

At Levels 1 and 2 we considered all three options outlined above. We considered that the risk of transmission, taking into account mitigations in place, would be sufficient to select Option 1 at all of these levels. This would provide a degree of public safety but would also continue to allow the sector to retain some financial viability, and to protect this important part of the tourism offer to ensure survival throughout the pandemic. It would also continue to allow public health benefits through increased social interaction.

Level 3

Level 3 is intended to apply for limited periods of time. Within Level 3, we would expect to see increased incidence of the virus, with multiple clusters and increased community transmission. There would be a graduated series of protective measures to tackle the virus, focusing on key areas of risk – broadly, indoor settings where household mixing takes place with less, or less well-observed, physical distancing and mitigations. The measures would be intended to be in place for limited periods and only for as long as required to get the virus down to a low, sustainable level.

Option 1: Baseline

Option 1 (the Baseline) involves the opening of all indoor and outdoor attractions, subject to guidance and protective measures being in place, this being more rigorous monitoring and implementation of the mitigations as outlined above at Level 0.

Where visitor attractions include retail or hospitality offerings they should therefore adhere to the additional protective measures in place for these sectors at level 3 – including restrictions on the sale of alcohol and shorter opening times for these facilities.

Option 2: Close indoor visitor attractions

Option 2 involves the closure of all indoor visitor attractions. This means that all those attractions, or elements of attractions, that operate indoors would be required to close. Those attractions, or parts of attractions, which operate outdoors, would remain open.

By closing indoor attractions, this would serve to reduce the remaining transmission risks that were not eliminated through mitigations put in place but allow continued benefits for health, wellbeing and economic viability by allowing outdoor attractions to remain open.

Closure of indoor attractions would, however, reduce further visitor numbers and sustainability, this impacting on current, and future, economic viability. It will also have a negative impact on socialisation and general wellbeing, increasing the risks of harm from social isolation and loneliness and people lose access to settings to socialise.

Option 3: Close all indoor and outdoor visitor attractions

This option would see the closure of all types of visitor attraction. Closure (as part of a broader package of closures across business areas where transmission is likely to occur) would have the most significant positive impact on transmission rates and spread of the virus. It would significantly reduce opportunities for people to meet in areas which are characterised by many of the high-risk factors associated with transmission of the virus identified by scientific evidence and modelling.

Closure of all attractions for any significant period would, however, reduce visitor numbers to zero and thus have a detrimental impact on attraction income, which will be unlikely to meet fixed costs and could lead to severe levels of job losses in the sector. Future viability of the attractions sector as whole could also be affected, with attendant impact on Scotland's wider tourism sector.

Closure would also have a negative impact on socialisation and general wellbeing as people would not be able to meet in visitor attractions, increasing the risks of harm from social isolation and loneliness and people lose access to settings to socialise.

Options

At Level 3 we considered all three options outlined above

Conclusion

At Level 3 we considered that the risk of transmission, taking into account mitigations in place, would be sufficient to select Option 1. This would provide a degree of public safety but would also continue to allow the sector to retain some financial viability, albeit they may have slightly increased costs if they require more visitor facing staff to ensure distancing and hygiene measures are more rigorously followed, and to protect this important part of the tourism offer to ensure survival throughout the pandemic. It would also continue to allow public health benefits through increased social interaction.

<u>Level 4</u>

Within this level we would expect to see very high or rapidly increasing incidence, and widespread community transmission which may pose a threat to the NHS to cope. It is likely that this level would see the introduction of measures close to a return to full lockdown. Measures would be designed to be in place for a short period, to provide a short, sharp response to quickly suppress the virus. Measures introduced in level 4 would be to control and suppress the spread of the virus, reduce transmission rates, hospital admissions, deaths, allow key services to continue such as education and avoid overwhelming of the NHS.

Options

At Level 4, all of the above three options were considered.

Conclusion

At Level 4, it was concluded that Option 2 discussed above (under the section on Levels 1, 2 and 3) – the closure of indoor attractions - would provide the best balance between reducing health harms and supporting economic viability.

The baseline option – opening all attractions with mitigations - would not deliver the policy objectives, and the measures outlined in the lower levels would have been insufficient. There are greater public health costs of not restricting social interaction, so the risk of maintaining the baseline was not considered a viable option.

Alternatively, Option 3 discussed above (under the section on Levels 1, 2 and 3) – complete closure of all attractions in Level 4 Local Authority Area - would affect all visitor attractions within the area, and their visitors. It could mean additional costs on businesses affected, impacting revenues and leaving businesses still having to meet fixed costs. In general, the impacts would be the closure of businesses / facilities and inability to generate little income to cover costs (overheads such as rent, rates and water). Evidence from the lockdown period from March to reopening in July shows that the immediate closure of organisations led to a reduction in their commercial income and immediate cash flow and viability challenges. Complete closure will exacerbate cash flow problems for organisations and potentially threaten viability of businesses putting jobs at risk and leading to higher unemployment.

It will also have a negative impact on socialisation and general wellbeing, increasing the risks of harm from social isolation and loneliness and people lose access to settings to socialise.

It was decided that, when balancing the limited risks through transmission in outdoor visitor attraction settings, these did not outweigh the economic impacts of Option 3.

Scottish Firms Impact Test:

There has been engagement with visitor attraction representative bodies in developing the provisions within the Strategic Framework. This engagement is set out within the consultation section of this BRIA.

What proportion of businesses are registered in Scotland?

In each of the SIC codes identified earlier in this BRIA, around 90% of registered enterprises active in Scotland are registered in Scotland[20].

[20] Scottish Government (2020) Growth Sector Statistics Database, Table 1.2.

- **Will it have an impact on the competitiveness of Scottish companies within the UK, or elsewhere in Europe or the rest of the world?**

At the present time, restrictions on visitor attractions in England are more strict than those in Scotland, and, along with current travel advice, means that there is unlikely to be an impact on competitiveness.

Any future stricter restrictions within Scotland (than those in the rest of the UK) could potentially have medium term impacts on the future competitiveness of Scottish visitor attractions both within the UK and elsewhere, if visitors from other local authorities or parts of the UK are unable to visit.

- **How many businesses and what sectors is it likely to impact on?**

Scottish Government data on registered enterprises is presented earlier in this BRIA. Of the registered enterprises identified above, the substantial majority in each activity are small businesses (with less than 50 employees[21].

Many visitor attractions have hospitality offerings, so these aspects and their supply chains will be negatively affected by hospitality restrictions in levels 1-4.

- **What is the likely cost or benefit to business?**

The measures set out in the Strategic Framework are likely to have significant costs to visitor attractions, as visitor numbers are greatly reduced due to physical distancing and ventilation requirements. The most severe costs will be incurred at level 4 where all museums and galleries and indoor attractions at visitor attractions, will be required to close.

The costs to indoor visitor attractions, particularly in level 4, may be partially off-set by the business support schemes in place by the Scottish Government and the UK Government Coronavirus Job Retention Scheme, which visitor attractions are able to access.

<u>Competition Assessment:</u>

There is likely to be some impact on competition between businesses.

- **Will the measure directly or indirectly limit the number or range of suppliers?**

It is anticipated that the measures in the Strategic Framework in relation to visitor attractions will limit the number and/ or range of suppliers. We know that around a fifth of visitor attractions have not re-opened since lockdown. A key factor for not re-opening in 2020 was due to it being not economically viable. Other measures within the Strategic Framework relating to hospitality, retail and travel will impact on the economic viability of visitor attraction businesses.

- **Will the measure limit the ability of suppliers to compete?**

The measures in the Strategic Framework in relation to visitor attractions will limit the ability of some suppliers to compete. As set out above some visitor attractions have decided it is not

[21] Scottish Government (2020) Growth Sector Statistics Database, Table 1.1

economically viable to re-open in 2020 due to the protective measures that need to be put in place resulting in additional costs and lower visitor numbers.

• **Will the measure limit suppliers' incentives to compete vigorously?**

It is not anticipated that the measures in the Strategic Framework in relation to visitor attractions will impact on suppliers incentives to compete vigorously.

• **Will the measure limit the choices and information available to consumers?**

The measures in the Strategic Framework in relation to visitor attractions will limit the choices and information available to consumers through limited availability and lack of alternatives.

Consumer Assessment:

The following sets out the Scottish Government's initial view on the impact of the measures in relation to visitor attractions, and museums and galleries within the Strategic Framework on consumers.

• **Does the policy affect the quality, availability or price of any goods or services in a market?**

The restrictions for visitor attractions are likely to impact upon consumers in terms of restricting their ability to visit visitor attractions in level 4. This may also have an impact in levels 0-3 as not all attractions are able to operate in a financially viable way within the new restrictions.

• **Does the policy affect the essential services market, such as energy or water?**

There is no expected impact on markets for essential services for visitor attractions.

• **Does the policy involve storage or increased use of consumer data?**

No

• **Does the policy increase opportunities for unscrupulous suppliers to target consumers?**

This is unlikely to occur as a consequence of the Strategic Framework

Test run of business forms: N/A

Digital Impact Test: N/A

Legal Aid Impact Test: N/A

Enforcement, sanctions and monitoring: Regulations have been put in place to support the implementation of the measures. Monitoring and enforcement will be undertaken by Local Authority Environmental Heath Officers and, in some cases, Police Scotland.

Implementation and delivery plan and post-implementation review:

Regulations and guidance have been put in place to support the implementation of the measures contained within the Strategic Framework.

The Health Protection (Coronavirus) (Restrictions and Requirements) (Local Levels) (Scotland) Regulations 2020 came into force from the 2nd November 2020. They are amended by the Health Protection (Coronavirus) (Restrictions and Requirements) (Local Levels) (Scotland) Amendment (No. 3) Regulations 2020, which will come into force on 20th November 2020.

We are continuing our constructive engagement with the sector.

Summary and recommendations:

Introduction

This BRIA has examined the measures in relation to visitor attractions within each level of the Strategic Framework and compared these measures with the baseline option, the equivalent of Level 0 in the Strategic Framework.

Background

The Scottish Government's Strategic Framework includes a package of measures which collectively are designed to supress transmission of the virus.

Whilst this BRIA is focused on visitor attractions, measures are also being taken to reduce opportunities for transmission across a range of settings. It is important to view measures for visitor attractions in the context of this wider package of actions.

Options Appraisal

The Strategic Framework includes a range of actions designed to supress virus transmission. In taking action a careful balance needs to be struck between protecting health and minimising the negative impacts on business, jobs and livelihoods.

The text and table below brings together the benefits and costs by option as set out in this BRIA. The summary table below brings together the benefits and costs of:

- Protective measures in place (in level 1-3)
- Closing museums and galleries and indoor attractions at a visitor attraction (in level 4)

It compares these measures against the baseline / level 0 option. More detailed discussion of each of the levels and the options that have been considered by Scottish Ministers within levels is contained within the main body of this document.

Option 1: Baseline

The baseline option (effectively level 0 of the Strategic Framework) would have a positive economic impact on visitor attractions through their revenue generation, employment of staff, and on supply chain businesses.

Higher rates of infection may ultimately impact negatively on visitor attractions as trade made be reduced due to visitors being anxious about social interaction, particularly in indoor venues. The workforce may be affected by higher levels of sick workers due to high rates of COVID-19, or larger numbers of staff self-isolating for 14 days.

Option 2: Strategic Framework

Visitor Attractions

Measure	Benefits	Costs
Preventative measures in place (in Levels 1-3)	Restricting visitor numbers through measures such as physical distancing reduces opportunities for virus transmission.	Restricting visitor numbers will lower demand, reduce revenue and turnover for visitor attractions.
Closing visitor attractions (in Level 4)	Level 4 will be deployed only if necessary as a short, sharp intervention to address extremely high transmission rates. Within this level we would expect to see very high or rapidly increasing incidence, and widespread community transmission which may pose a threat to the NHS to cope. Closing visitor attractions (along with the package of other measures under level 4 of the Strategic Framework) would lead to a rapid reduction in infection rates.	Evidence from the lockdown period shows that the immediate closure of visitor attractions led to a collapse in their commercial income and immediate cash flow and viability challenges. Closure will exacerbate cash flow problems for organisations and potentially threaten viability of businesses putting jobs at risk and leading to higher unemployment.

Conclusion

This BRIA has set out the relative costs and benefits of options with the intended effect of suppressing the virus whilst acknowledging and minimising the economic harms faced by businesses.

It is also important to note that we have set out a comprehensive package of financial support for businesses, including indoor visitor attractions, and museums and galleries which have to close in level 4, to mitigate the negative impacts of the restrictions.

The new Scottish Government financial support will apply across all the relevant levels and will provide:

- A grant of £2,000 or £3,000 (depending on rateable value) for business required to close by law, payable every four weeks for the duration protective measures are in place

- A hardship grant of £1,400 or £2100 (depending on rateable value) for businesses that remain open but are specifically required to modify their operations by protective measures, payable every four weeks for the duration measures are in place

These grants will be provided regardless of level, to eligible businesses, and paid in fortnightly instalments (subject to discussions with local authorities).

This support is in addition to the UK government Coronavirus Job Retention Scheme whereby employees will receive 80% of their usual salary for hours not worked, up to a maximum of £2,500 per month. The UK Government announced on 5 November that they have now extended the scheme to March 2021.

These support measures are designed to support businesses and mitigate the negative impacts of the restrictions which have been identified and considered. We will continue to engage with the sector on the impact of the measures, and the level of support available, as they are implemented.

Declaration and publication

Sign-off for BRIA:

I have read the Business and Regulatory Impact Assessment and I am satisfied that, given the available evidence, it represents a reasonable view of the likely costs, benefits and impact of the measures set out in the regulations and guidance. I am satisfied that business impact has been assessed with the support of businesses in Scotland.

Signed: Michael Russell

Date: 20/11/2020

Minister's name: Michael Russell
Minister's title: Cabinet Secretary for Constitution, Europe and External Affairs.

Annex A

Museums and Galleries – Additional Information

As the largest part of the visitor attractions sector, we have also included some specific information on museums and galleries.

Regular communication with Museums Galleries Scotland, who are in close contact with the sector, has informed us that of 429 museums and galleries, 160 museums had reopened by early October before seasonal closures. An interactive map lists the museums that are currently open in Scotland.

55% of museums who responded to a survey by Museums Galleries Scotland in April 2020 reported that they would run out of funds within 6 months and 71% reported that they would not survive for a year without financial support[22].

Museums Galleries Scotland, the development body for museums in Scotland, conducted a survey between 29 Sept and 19 Oct, receiving 91 responses from 78 organizations.

- 46% of respondents said that the pandemic had resulted in temporary closure of their museum(s) until next season or beyond.
- 20% of respondents reported that their café / shop is closed.
- 40% of respondents reported a reduction in their opening hours.
- 60% respondents reported a reduction in their outreach programme and 55% respondents reported a reduction in their education programme.
- 22% of respondents still had staff on furlough.

The National Collections including the National Galleries of Scotland (NGS) and National Museums Scotland (NMS) closed their doors to the public on 18 March. NGS and NMS usually receive around 20-25% of their income from commercial activities[23]. As this reduced to virtually zero during the lockdown they both applied to furlough staff.

Across the wider sector the majority of staff were furloughed (for example up to 80% of staff in industrial museums) [6], with the exception of essential management, security and maintenance staff. Museums and galleries have had to make decisions about whether they can afford to re-open, the scale of redundancies, cancelling of community engagement programmes, exhibitions, training programmes and critical repairs.

The £4m Museum Resilience and Recovery Fund, administered by Museums Galleries Scotland (MGS) provides support for the sector to help them get through the rest of the financial year and return staff from furlough.

[22] https://www.museumsgalleriesscotland.org.uk/stories/museums-galleries-scotland-publishes-key-findings-on-impact-of-covid-19-on-scottish-museum-sector/

[23] https://www.nationalgalleries.org/sites/default/files/features/pdfs/Annual_Accounts_31_March_%202018.pdf
https://www.nms.ac.uk/media/1160756/final-annual-report-and-accounts-2018-19.pdf

Scottish Government provided £483,000 in March 2020 which enabled support for museums most at risk of folding by the end of April 2020. As part of this support package MGS initially launched two funding programmes to help Independent Accredited museums affected by the coronavirus outbreak: the **Urgent Response Fund** (£700k), as well as the **Digital Resilience Covid-19 Fund** (originally £55k from the Scottish Government; MGS have added an additional £60k). They subsequently launched the £330k **Covid-19 Adaptation Fund**, in partnership with The Art Fund, to support museums with necessary adaptations to enable reopening.

Emergency funding from a range of sources – MGS Urgent Response Fund, National Lottery Heritage Fund, Third Sector Resilience Fund, Business Support Fund (and for a small number the Pivotal Enterprise Fund and Hardship and Resilience Business Fund) – have provided vital support but all of these sources of funding have been short term, providing relief for 12-16 weeks only.

Museums and galleries are at the heart of communities right across Scotland, key to national and local identities and deliver social impacts in education, health and wellbeing, as well as substantial economic impacts, and are a key part of the £1.35 billion total attributable heritage impact[24].

Many museums and galleries include a hospitality or retail offering, these may still be able to operate, subject to the regulations, following the relevant guidance[25] and depending on the level that the visitor attraction is in. Separate BRIAs have been prepared for these sectors.

[24] https://www.historicenvironment.scot/media/3917/heritage-tourism-impact-report.pdf
[25] https://www.gov.scot/publications/coronavirus-covid-19-retail-sector-guidance/; https://www.gov.scot/publications/coronavirus-covid-19-tourism-and-hospitality-sector-guidance/