

Coronavirus Restrictions Review - 14 May 2021

SUMMARY IMPACT ASSESSMENT

Introduction

A [Summary Impact Assessment \(SIA\) was produced in December 2020](#) following the introduction of a system of alert levels in Wales. Following [the 21 Day Review in February 2021, a further SIA was produced](#). The [latest SIA was produced following the 21 Day Review on 22 April](#).

The [revised Coronavirus Control Plan](#) can be seen on the Welsh Government website.

This document aims to capture an assessment of the impact of the easements made or signalled during the 21 Day Review on 14 May 2021 on different demographics in Welsh society.

The emergence in December of the now dominant and more infectious 'Kent variant' of the virus led to a need for tightened restrictions at Alert Level 4 (e.g. preventing face to face learning for the vast majority of learners in education). Since then, the health position in Wales has improved enabling some modest easements to be made in the February and March restriction reviews. The improvements have continued and have been sustained enabling the cautious and gradual transition to Alert Level 2 in Wales.

The primary easements made at the 21 Day Review on 14 May 2021 are as follows:

- Indoor hospitality can re-open – six people from up to six households (not including children under 11) can book;
- All holiday accommodation can re-open fully;
- Entertainment venues, including cinemas, bingo halls, bowling alleys, indoor-play centres and areas, casinos, amusement arcades, and theatres can re-open. Cinemas, theatres concert halls and sports grounds can sell food and drink as long as it is consumed in a seated area for watching the performance;
- Indoor visitor attractions, including museums and galleries can re-open;
- Up to 30 people can take part in organised indoor activities and up to 50 people in organised outdoor activities. This includes wedding receptions and wakes.

International travel will resume from Monday 17 May. A traffic light system, aligned with England and Scotland, will be introduced. Countries will be classified as green, amber and red. This means people living in Wales will be able to travel to a small number of foreign destinations without the need to quarantine on their return. Mandatory quarantine for countries not on the green list remains in place.

Legislative background

The Health Protection (Coronavirus Restrictions) (Wales) Regulations 2020 came into force on 26 March 2020, and were subsequently replaced by The Health Protection (Coronavirus Restrictions) (No. 2) (No. 3) and (No. 4) (Wales) Regulations 2020. A [consolidated version of the most recent Regulations can be found on GOV.WALES](#).

This Summary Impact Assessment relates to the amendments made to The Health Protection (Coronavirus Restrictions) (No. 5) (Wales) Regulations 2020 as a result of the 21 Day Review on 14 May 2021.

Review of restrictions regulations

The Regulations are reviewed every three weeks in line with the latest evidence and intelligence.

Impact Assessments

The following impact assessments relating to the easements made can be found in the remainder of this document:

- i. Meeting in regulated settings indoors rule of 6
- ii. Indoor hospitality
- iii. Indoor attractions and amusement arcades
- iv. Theatres and Concert Halls
- v. Museums and Galleries
- vi. Cinemas
- vii. Remaining Accommodation
- viii. Indoor Play Centres
- ix. bowling alleys
- x. Wedding receptions

- i. Meeting in regulated settings indoors rule of 6**

WELLBEING IMPACTS

There are significant negative impacts associated with restricting people socialising.

The PHW survey on health and wellbeing (1 to 7 March 2021) showed that when asked how they have felt in the last week 22% of people reported feeling lonely occasionally whilst 16% felt lonely always or often. Some 24% of people felt isolated occasionally with 25% reporting feeling this way always or often. Over this period the proportion reporting being worried about their mental health and wellbeing was 58%.

The following data was used during the easing to allow extended households in 2020. The survey which contained the data has not been updated since November 2020. It is likely that the key messages below are relevant to this easing due to the environment in June 2020 looking relatively similar to present day.

A combined analysis by PHW of the survey on health and wellbeing carried out between 13 April and 7 June 2020 identified specific concerns of those classed as clinically vulnerable, including 25% of vulnerable individuals worrying a lot about their mental health and wellbeing (compared with 14% of those with no vulnerabilities).

Previous analysis by Public Health Wales¹ of the data from its weekly wellbeing surveys (covering the period of 13 April – 10 May) identified key demographic findings for people living in the most deprived areas of Wales who are more likely to be: self-isolating (45% of the most deprived fifth of the population compared with 31% of the most affluent fifth of the population); very worried about their mental health (30% vs 17%); feeling very anxious (28% vs 20%); and feeling isolated (29% vs 18%).

In terms of gender, females are more likely to be: self-isolating (40% vs 33%); very worried about their mental health (25% vs 20%); feeling very anxious (28% vs 20%); and feeling isolated (29% vs 18%). More females say their sleeping is negatively affected during lockdown. Whilst they report increases in snacking more and using social media more than males during the coronavirus restrictions, females are also spending more time outdoors and have been talking to friends and family more than they usually would.

The ONS report 'Coronavirus and loneliness'² (3 April – 3 May) considers how the coronavirus has impacted people living with loneliness. While this is now dated, it highlighted the chronically lonely and the lockdown lonely were most worried about the impact of Covid-19 on their wellbeing over other concerns. They were more likely than average to report feeling stressed or anxious; spending too much time alone; feeling bored; impacts on their mental health; strain on personal relationships and having no-one to talk to about their problems.

ONS also produced analysis in December 2020 looking at the impact of Coronavirus on depression in adults. This indicated that around a fifth of adults were likely to experiencing some form of depression in November 2020, almost double the rates reported prior to the pandemic. It also showed that younger adults, women, those unable to afford an unexpected expense or disabled people were most likely to be experiencing depression.³

¹ <https://phw.nhs.wales/news/public-health-survey-reveals-bigger-impacts-of-novel-coronavirus-covid-19-and-restriction-measures-on-wellbeing-of-those-in-poorer-communities/>

² <https://www.ons.gov.uk/peoplepopulationandcommunity/wellbeing/bulletins/coronavirusandlonelinessgreatbritain/3aprilto3may2020>

³ <https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/healthandwellbeing/bulletins/coronavirusandthesocialimpactsongreatbritain/11december2020#loneliness-of-adults-experiencing-some-form-of-depression-or-anxiety>

Additional evidence:

- Ipsos Mori survey data⁴ suggests that 17% of Welsh participants are worried about not being able to go out in general and 20% of Welsh participants are worried about their mental health
- Hafal's survey of 300 adults in Wales⁵ suggest that 73% of participants say their mental health has been negatively affected as a result of the coronavirus outbreak
Mental Health Foundation's longitudinal study⁶ suggests that 24% of UK adults have felt loneliness because of coronavirus and feelings of loneliness have more than doubled since lockdown.

ECONOMIC IMPACTS

For those businesses able to operate, the change to allow people to meet the same number of people from more households could potentially see a large positive impact as a result of more people being able to access their services. For example, there may be a significant positive economic impact as it will allow for a wider pool of customers to visit different businesses, notably hospitality entertainment venues and indoor visitor attractions. These businesses are also more likely to attract more customers if they can visit with more of their friends and family.

ENVIRONMENTAL IMPACTS

The potential increased movement of people could have an impact on air quality as people begin to travel longer distances within and to Wales. The current health situation and constrained public transport capacity will lead to a greater use of private vehicles and limited use of car sharing. Active travel is being actively promoted, but this is unlikely to be viable for longer distances.

Easing restrictions to indoor regulated will almost certainly increase the reasons for members of the public to travel by private vehicle (especially so given restraints to effective public transport capacity). While no forecasts are available as to what the knock on effect will be to air quality it can be expected to have a negative impact when compared to recent months, in which air quality is believed to have improved. For this reason, officials in Environment and Rural Affairs are monitoring the impacts on air quality that have arisen since lockdown measures were introduced. External consultants have been commissioned to analyse the impacts and this work will inform future policy with a view to retaining air quality improvements for the future, as far as possible.

IMPACT ASSESSMENTS

⁴ <https://www.ipsos.com/ipsos-mori/en-uk/Covid-19-and-mental-wellbeing>

⁵ <https://www.hafal.org/2020/04/survey-raises-concerns-about-the-provision-of-mental-health-services-in-wales-during-the-covid-19-outbreak/>

⁶ <https://www.mentalhealth.org.uk/our-work/research/coronavirus-mental-health-pandemic>

Equality impacts

An assessment of impacts by protected characteristics is set out below. In general terms the proposal promotes equality as it allows up to six people from up to a maximum of six households to meet for any reason indoors in regulated settings, including private garden and outdoor hospitality settings that will have affected different groups in different ways.

Protected characteristic or group	What are the positive or negative impacts of the proposal?	Reasons for your decision (including evidence)	How will you mitigate Impacts?
<i>Age (think about different age groups)</i>	<p><i>Positive:</i> Allowing 6 people from up to 6 different households to meet for any reason will benefit those cut-off from family and friends, mitigating effects of loneliness and isolation or digital exclusion.</p> <p><i>Negative:</i> People of all ages, but particularly older people, may be concerned about increased risks from an increase in people meeting indoors in regulated settings</p>	<p>A range of survey data suggests younger people (18-29) are most likely to be worried about their mental health, and a more likely than other age groups to feel isolated.</p> <p>People over 70 are more likely to be worried about their health and the risks of contracting COVID-19, however the majority of this age group have received at least the first dose of the vaccine, so could alleviate some of the concerns.</p>	<p>Guidance will be issued to outline increased risks of people meeting indoors (up to 6 people from 6 households), and how to best protect against transmission (social distancing).</p> <p>Continued guidance for those clinically extremely vulnerable to ensure additional risks are considered when outdoors.</p>
<i>Disability (think about different types of disability)</i>	<p>Positive: for disabled people who have not needed to access provisions under support and care will be able to meet socially with additional friends and family indoors in regulated settings</p>	<p>Our rules already allowed for disabled people (including disabled children) to access support and care from friends and family. Therefore, disabled people could already meet.</p>	<p>No specific additional mitigations are proposed</p>

<i>Gender Reassignment (the act of transitioning and Transgender people)</i>	<i>Positive:</i> The ability to access support networks may have been constrained by the restrictions which would negatively affect wellbeing.	<i>No specific evidence identified</i>	<i>N/A</i>
<i>Pregnancy and maternity</i>	<i>Positive:</i> Issues of loneliness, isolation or access to support networks may have been exacerbated by restrictions on meeting with other households	<i>No specific evidence identified</i>	<i>N/A</i>
<i>Race (include different ethnic minorities, Gypsies and Travellers and Migrants, Asylum seekers and Refugees)</i>	<i>Positive:</i> No specific differential impacts households <i>Negative:</i> Black Asian and minority ethnic individuals are known to be at higher risk from the effects of coronavirus and may have heightened concerns about easing restrictions.		General communication activity on the risks for different groups and ongoing need for everyone to continue to follow guidance such as social distancing and good hygiene.
<i>Religion, belief and non-belief</i>	No specific differential impacts identified	<i>N/A</i>	<i>N/A</i>
<i>Sex / Gender</i>	<i>Positive:</i> The restrictions appear to affect different sexes in different ways, which could be mitigated by relaxation.	Surveys indicate females are more likely to be self-isolating, very worried about their mental health, feeling anxious and feeling isolated. More females say their sleeping is negatively affected during lockdown	No specific additional mitigations are proposed
<i>Sexual orientation (Lesbian, Gay and Bisexual)</i>	No specific differential impacts identified	<i>N/A</i>	<i>N/A</i>
<i>Marriage and civil partnership</i>	No specific differential impacts identified.	People who were married or cohabiting were less likely than	<i>N/A</i>

		average to feel lonely (chronic and 'lockdown' loneliness) (ONS opinions and lifestyle survey, May 20)	
<i>Children and young people up to the age of 18</i>	<i>Positive:</i> Children under the age of 11 are excluded from the six people meeting indoors in regulated settings restriction.	The top two issues for children (12-18) relating to restrictions are 'not being able to spend time with friends' (72%) and 'not being able to visit family members' (59%) (Coronavirus and Me survey, January 2021)	N/A
<i>Low-income households</i>	<i>Positive:</i> Issues of loneliness, isolation or access to support networks may have been exacerbated by restrictions on meeting with other households.	<i>PHW Wellbeing survey:</i> those living in the most deprived areas of Wales are more likely to be self-isolating, be feeling anxious and isolated during coronavirus restrictions, and report greater worries about their mental health	N/A

Human Rights and UN Conventions

The overriding purpose of the restrictions and requirements associated with lockdown have been to protect everyone's right to life. This has led to constraints on rights such as on private and family life and the freedom of assembly and association on justifiable health grounds. Public health is described as an acceptable reason to curtail these rights, as long as it is necessary and proportionate. Notwithstanding the ongoing constraints from lockdown in the round, this proposal in affects the following:

<i>Human Rights</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate negative Impacts?</i>
The right to enjoy family relationships without interference	<i>Positive:</i> removing meeting other people in indoor regulated settings restrictions will facilitate family	The restrictions were based on public health grounds and the assessment and review process seeks	No specific negative impacts from the proposal.

from government (e.g. right to live with your family and to regular contact)	relationships by limiting restrictions placed by the government. Remaining restrictions on indoors in private settings and numbers of households meeting continue to be proportionate on public health grounds.	to lift these as soon as they are no longer proportionate. This process has led to the proposal to lift this restriction.	
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United Nations Convention on the Rights of the Child

The convention has been considered in this assessment. The restrictions on movement and gatherings conflicts with the following Articles:

- Article 15 – Children have the right to meet together and to join groups and organisations, as long as this does not stop other people from enjoying their rights.
- Article 31 – All children have a right to relax and play, and to join in a wide range of activities.

Children under 11 are excluded from the restrictions on meeting indoors. This easement will mitigate the restrictions on older children and allow them to meet with more of their friends for the first this year indoors in regulated settings.. These rights will still be constrained by the need to contain the spread of the virus and protect public health (e.g. continued physical distancing).

The Coronavirus and Me survey of 23,700 children in Wales ensures the views of children inform policy choices (Article 12 – Children have the right to say what they think should happen, when adults are making decisions that affect them, and to have their opinions taken into account). This survey finds the top two stay at home rules that have impacted young people (12-18) the most on how they feel are ‘not being able to spend time with friends’ (72%) and ‘not being able to visit family members’ (59%). For many there has been a pleasure in spending more time with their family, learning new skills and enjoying the outdoors in gardens and during daily exercise.

For some, this period has also brought relief from previous social and health pressures such as mental health difficulties or bullying.

Welsh Language

The proposal does not have any identified negative impact on the Welsh language. In general terms the ability to meet with people from up to six other households indoors could have a positive effect on the use of the Welsh language. This will enable Welsh speakers to meet with other Welsh speakers across Wales and beyond. Welsh medium education is not affected by this proposal.

ii. Indoor Hospitality

WELLBEING IMPACTS

Survey evidence provides a snapshot of mental wellbeing across Wales as restrictions remain in place. Public Health Wales' *Public Engagement Survey on Health and Wellbeing during Coronavirus Measures*, for the week 1 to 7 March, showed that 27% were worrying about their mental health a lot (31% a little), and 49% said their mental health was worse than before the pandemic. The mental health charity Mind published survey evidence last year suggesting that more than half of adults and young people in the UK had experienced a deterioration in their mental health as restrictions have remained in place, with young adults being worse affected.⁷

It is well-established that unemployment is associated with low levels of wellbeing and worsening health. Increasingly, adverse effects will also be felt by new entrants to the labour market should they enter the labour market during an economic downturn. There is academic evidence that adverse labour market experiences in recession can have life-long effects on the economic, health, wellbeing and even life-expectancy of young people.⁸

ECONOMIC IMPACTS

Economic significance of sector

According to ONS data, the whole of the *Food and Beverage Service* sector contributed £1.3billion of gross value added (GVA) to the Welsh economy in 2018, equivalent to 2% total GVA for the same year. In 2019 using Business Register and Employment Survey (BRES) data, there were an estimated 85,500 people directly employed in the 'Hospitality - Pubs, Cafes and Restaurants' sector in Wales, 6.7% of total employment.⁹

The hospitality sector is also fundamental to the foundation economy. Local companies often source food and drink from local suppliers. There is a clear knock on impact of the closure of the hospitality sector on the food and drink supply sector – for example, 50% of milk that is supplied by farmers generally goes to the hospitality sector. Although there has been a 15% uplift in the domestic consumption this does not make up for the drop from hospitality. Welsh Government has had to step in to support farmers as a result.

In 2019 22% of domestic leisure trips of 3+ hours involved going out for a meal, and for 9% of all visits (13.5 million trips out, with associated spend of £500m) this was the main reason for the trip. 19% involved going on a night out to a pub or club, and for 10% of all visits (15.2 million trips out, with associated spend of £449m) this was the main reason for the trip. Associated spending includes all parts of the leisure trip, and data for expenditure on eating and drinking in particular is not available. For

⁷ Mind (2020) The mental health emergency: How has the coronavirus pandemic impacted our mental health?

⁸ See: <https://voxeu.org/article/impact-covid-19-chronic-health-uk>

⁹ Defined 2-digit SIC2007 code (56) Food and Beverage service activities i.e. restaurants, cafes, takeaway food, pubs / bars, clubs, and event catering

overnight trips to Wales, direct spending on eating and drinking out during 2019 was £428m, 28% of the total trip cost, on average.¹⁰

Food and drink are core to the tourism experience and recent consumer research shows lack of food and drink facilities to be key barrier to travel and days out this year. The Wales Visitor Survey 2019¹¹ found that 83% of UK staying visitors and 59% of UK day visitors ate out during their trip in Wales. The Visit Wales UK Consumer Tracker (19-23 April)¹² found that among those who were 'not very confident' about travelling this Spring, the leading factors were 'restrictions on travel from government' and 'fewer opportunities to eat/drink out' (38% mentioned this). The ALVA Attractions Recovery Tracker last year (Wave 3, 9-12 June 2020)¹³ found that 21% of consumers would not visit an attraction if the café or food/drink outlet was closed, second only to toilet facilities in terms of importance.

General economic impacts

Annual UK Gross Domestic Product (GDP) fell by 9.9% in 2020. Accommodation and Food Service activities saw a 44% fall in output during 2020, Arts Entertainment and Recreation saw a 26% fall, though food and beverage service activities showed a strong bounce-back during August 2020.

The ONS' Business Insights and Conditions Survey (BICS) provides insights to the effects of restrictions across the UK on the broad *Accommodation and Food Service Activities* sector.¹⁴ Along with *Arts, Entertainment, and Recreation* it is one of the areas of the UK economy that has been most severely impacted by the health pandemic and associated restrictions; in late April only 6 in 10 UK accommodation and food service businesses were trading, lower than almost all other industries, and compared with 83% of UK businesses overall¹⁵. As expected these two sectors continue to report the most significant drops in business turnover, with 6 in 10 accommodation and food service businesses saying their turnover had decreased, compared with a third of UK businesses overall.

The nature of pubs, cafes, and restaurants is that much of the demand (and associated revenues) lost since restrictions were put in place may potentially be lost and not recovered once restrictions are eased. Forgone consumption in this sector is unlikely to build up and be released (pent-up demand) in ways that are conceivable for other sectors that may sell goods and/or services.

An additional ERF allocation of £200m is under consideration (advice being developed) to support this sector through gradual reopening and continuing restrictions.

¹⁰ Source: GBTS, 2019. Internal analysis

¹¹ [Wales Visitor Survey 2019](#)

¹² COVID-19 Consumer Weekly Tracker ([Wave 29, 19-23 April](#))

¹³ ALVA Attractions Recovery Tracker [Wave 3: 9-12 June](#)

¹⁴ Covering the period 18 May to 31 May.

¹⁵ The percentage of businesses in the UK reporting that they were continuing to trade was 61% for the Accommodation and Food Services sector and 78% for the Arts, Entertainment, and Recreation sector. The UK all-sector average was 83%.

Employment and Income Effects

Many companies are utilising the UK Government Coronavirus Job Retention Scheme to furlough staff or other forms of support. The CJRS ensures that should workers be furloughed the UK Government will guarantee 80% of their normal salaried income (with employers allowed to top up at their discretion). In the BICS survey for 5-18 April, 13% of UK workers were on furlough, but Accommodation and food services and Arts, entertainment and recreation were the two worst affected industries, reporting 38% and 40% of their workers on full or partial furlough respectively.

For many in Wales the Covid-19 pandemic has had a detrimental impact on their household incomes. Survey evidence suggests that the 20% of people are in a worse financial situation as a result of the coronavirus, while 16% report being better off.¹⁶ Concerns have been raised that the coronavirus is having a detrimental impact on the finances of poorer households, particularly those whose members work in shutdown sectors. These households are less likely to be able to reduce their spending significantly as a result of coronavirus in the same way that richer households will be able to, meaning they are more likely to be financing their spending during restrictions using savings (which may be limited) and accumulating debt.¹⁷ Those with lower incomes have been more likely to see their income reduced, and lower-paid workers have been more likely than those on higher pay to have been furloughed or lost their jobs.¹⁸

Workforce

The workforces for tourism and hospitality both areas of the economy tend to be disproportionately lower educated, younger, Black, Asian and Minority Ethnic workers, and command salaries significantly below the Welsh average (median) – many of these are groups that typically experience the worst persistent impacts on their health, earnings, and employment potential as a result of economic downturns.

Supply chain / value of hospitality to Welsh economy

In 2018 the whole of the food and beverage service sector was worth £1.3billion of gross value added (GVA) to the Welsh economy. This was equivalent to 2% and 1.2% respectively of all GVA for that same year. While internal UK market goods flow statistics are not available, Welsh hospitality will in many instances be buying produce and manufactured goods directly from Welsh firms, so there are likely to be supply chain benefits to increased levels of economic activity being permitted in the sector – however quantifying that impact is not possible.

ENVIRONMENTAL IMPACTS

¹⁶ Public Health Wales (2021) Public Engagement Survey on Health and Wellbeing during Coronavirus Measures: Week 48: 1 – 7 March 2021.

¹⁷ Bangham & Leslie (2020) Rainy days: An audit of household wealth and the initial effects of the coronavirus crisis on saving and spending in Great Britain. Resolution Foundation.

¹⁸ Resolution Foundation: [Incomes, savings and spending through the coronavirus crisis](#) November 2020

Pubs, cafes, and restaurants are all areas which require employees and consumers to travel to business premises to operate. While the Welsh Government continues to promote active travel as an alternative to other forms of travel throughout the coronavirus pandemic and beyond, opening up the sector will almost certainly increase the reasons for members of the public to travel by private vehicle (especially so given restraints to effective public transport capacity). While no forecasts are available as to what the knock on effect will be to air quality it can be expected to have a negative impact when compared to recent months, in which air quality is believed to have improved. For this reason, officials in Environment and Rural Affairs are monitoring the impacts on air quality that have arisen since lockdown measures were introduced. External consultants have been commissioned to analyse the impacts and this work will inform future policy with a view to retaining air quality improvements for the future, as far as possible.

ENABLER INTERDEPENDENCIES

Childcare

Welsh Government analysis suggests that there are 11,400 adults employed within the pubs and restaurants sector who have children aged 16 and under. At present we do not have any analysis which allows us to understand how many of these may need formal childcare arrangements in place in order to return to work.

Transport

Data from the 2014/15 National Survey of Wales records the mode of transport people used to travel to pubs, cafes, etc. It showed that (non-exclusively) 47% of people used a car as a usual form of travel to pubs, cafes, and restaurants, 43% walked, and 8% used buses, and 9% used taxis. This raises a potential issue that needs consideration, which is around the potential risk of an increase in drink driving offenses should people refrain or not be permitted to use taxis (due to distancing rules) after drinking alcohol. There is also potential for increased anti-social behaviour and public order issues from excessive alcohol consumption presenting issues for train/bus staff and taxi/PHV drivers.

IMPACT ASSESSMENTS

Equality impacts

An assessment of impacts by protected characteristics is set out below. In general terms the proposal promotes equality as it removes restrictions on travel that will have affected different groups in different ways. Potential negative impacts relate to the risks of adaptations being made to outdoor places not fully taking into account the needs of different groups. These are primarily about equality of access.

<i>Protected characteristic or group</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate Impacts?</i>
<i>Age (think about different age groups)</i>	<p>Positive: Younger cohorts of the population are significantly more likely to work within this sector in Wales than older cohorts, therefore opening sector could have positive distributional impacts if it prevents potential job losses and increases household incomes by transferring individuals off the UK's Job Retention Scheme. This cohort currently represents the age group most at risk from an economic downturn.</p> <p>Negative: The risk of negative health outcomes associated with contracting Covid-19 increases with age, which should be considered for both staff and customers of the sector.</p>	Analysis by Welsh Government of Annual Population Survey (APS) data for 2019 shows that 46% of workers in pubs, cafes, and restaurants in Wales are under the age of 25 (while this age group only represents 12% of workforce).	<p>Mitigations that the sector have been asked to implement and limited reopening in first instance are aimed at reducing the risk of transmission for all groups; customers and staff.</p> <p>Risk assessments that businesses need to conduct should be used to identify disproportionate risks to certain groups.</p>
<i>Disability (think about different types of disability)</i>	Positive: Disabled population in Wales represent a higher share of employees within the pubs and restaurants sector than they do in the workforce as a whole, therefore opening sector could have positive distributional impacts if it prevents potential job losses	Analysis of APS data for 2019 suggests that the proportion of disabled people working in pubs and restaurants in Wales, is higher than average with 19% of the workforce being classified as disabled (this group represents 15% of the wider workforce).	<p>Welsh Government are aware of potential issues and are engaging with appropriate groups in preparation of completing an Integrated Impact Assessment.</p> <p>Risk assessments that businesses need to conduct should be</p>

	and increases household incomes by transferring individuals off the UK's Job Retention Scheme.		used to identify disproportionate impacts on certain groups.
<i>Gender Reassignment (the act of transitioning and Transgender people)</i>	No specific differential impacts identified.	N/A	N/A
<i>Pregnancy and maternity</i>	Negative: Planned reopening of the sector may result in space being used to increase effective outdoor capacity. It will be important to ensure that this does not create hazardous environments for parents with young children or pushchairs.	N/A	Welsh Government are aware of potential issues and are engaging with appropriate groups in preparation of completing an Integrated Impact Assessment.
<i>Race (include different ethnic minorities, Gypsies and Travellers and Migrants, Asylum seekers and Refugees)</i>	<p>Positive: BAME population more likely to work within this sector in Wales than white population, therefore opening sector could have positive distributional impacts if it prevents potential job losses and increases household incomes by transferring individuals off the UK's Job Retention Scheme.</p> <p>Negative: BAME groups may be disproportionately at risk of negative health outcomes should they contract Covid-19, which should be</p>	Analysis of APS data for 2019 estimates that 12% of workers in pubs and restaurants in Wales are BAME (while this group only represents 5% of the Welsh workforce).	<p>Mitigations that the sector have been asked to implement and limited reopening in first instance are aimed at reducing the risk of transmission for all groups; customers and staff.</p> <p>Risk assessments that businesses will need to conduct should be used to identify disproportionate risks to certain groups.</p>

	considered for both staff and customers of the sector.		
<i>Religion, belief and non-belief</i>	No specific differential impact identified.	N/A	N/A
<i>Sex / Gender</i>	Positive: proportion of sector employees who are women slightly higher than for Welsh workforce as a whole.	Analysis of APS data for 2019 estimates that 50% of workers in Wales within pubs and restaurants are female, while women represent 47% of the total Welsh workforce.	No specific negative impacts from the proposal.
<i>Sexual orientation (Lesbian, Gay and Bisexual)</i>	No specific differential impact identified.	N/A	N/A
<i>Marriage and civil partnership</i>	No specific differential impact identified.	N/A	N/A
<i>Children and young people up to the age of 18</i>	Negative: Adults employed within pubs, cafes, and restaurants could have childcare responsibilities. Traditional forms of childcare may have been disrupted by current lockdown restrictions.	Welsh Government analysis of 2018 Annual Population Survey data suggests that 11,400 adults employed within the pubs and restaurants sector have children under the age of 16.	The Welsh Government has eased restrictions on childcare sector with a view to easing the pressures on families who may have adults who need to return to physical premises to work.
<i>Low-income households</i>	Positive: Allowing members of this sector to return to work has the capacity to mitigate job losses	Provisional data from the Annual Survey of Hours and Earnings provides estimates for hourly and weekly gross pay by 2-digit SIC codes in Wales. For Food and Beverage Service Activities (SIC code 56) median gross hourly pay was £8.28 - £3.91 lower than the Welsh median for all employee jobs of £12.19. For weekly gross pay in this sector the median is £197.30,	No specific negative impacts from proposal.

		<p>approximately £243.50 lower than the Welsh median.</p> <p>Using the same data at least 80% of employees in Food and Beverage Service Activities are estimated to have lower gross hourly pay than the Welsh median.</p>	
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Human Rights and UN Conventions

The overriding purpose of the restrictions and requirements associated with lockdown have been to protect everyone’s right to life. This has led to constraints on rights such as on private and family life and the freedom of assembly and association on justifiable health grounds. Public health is described as an acceptable reason to curtail these rights, as long as it is necessary and proportionate. Notwithstanding the ongoing constraints from lockdown in the round, this proposal in affects the following:

Human Rights	What are the positive or negative impacts of the proposal?	Reasons for your decision (including evidence)	How will you mitigate negative Impacts?
The right to enjoy family relationships without interference from government (e.g. right to live with your family and to regular contact)	Positive: allowing Pubs, Cafes, and Restaurants to reopen will facilitate the return to work of many employees within the sector who currently could be earning below the National Living and Minimum Wages due to receiving 80% of their pre-crisis income.	Income data from Annual Survey of Hours and Earnings shows that workers in this sector earn significantly below the average (median) Welsh wage and many are likely to be earning less than the National Living/Minimum wage as a result of being furloughed.	No specific negative impacts from the proposal.

United Nations Convention on the Rights of the Child

The opening of indoor hospitality supports the requirement that all children and young people have a right to relax, play and to join in a wide range of activities. Indoor hospitality form part of the provision of experiences and facilities that will be family-orientated that will maximise the outcomes that can be delivered for children and young people.

Welsh Language

There are 150,000 people directly employed in the visitor economy - around 12% of the workforce. The economy is integral to creating the social conditions where Welsh speakers can stay in Welsh-speaking communities, or return to those communities. Many predominantly Welsh-speaking areas are highly dependent on tourism for income and employment. A high percentage of tourism businesses are located in Welsh-speaking areas – for example over a third of tourism accommodation businesses are located in local authority areas where more than 40% of the population speak Welsh as a first language.

Welsh speaking communities will benefit from the continuing operation of hospitality businesses which in turn will help create and safeguard employment, potentially encouraging Welsh speakers to stay and work there, and thus maintain the viability of the language.

iii. Indoor attractions and amusement arcades

WELLBEING IMPACTS

Tourism including attractions, contributes to the growth and prosperity of local economies across Wales. Typically, tourism employs more women than men. A higher proportion of employment in tourism in Wales is part time which accounts for nearly half of all employment and this has been increasing in recent years. When comparing to the total for the other priority sectors in Wales, the share of employment in Tourism is substantially higher for people who are BAME and those aged 16-24 years and is slightly higher for people who have a disability.

The tourism sector provides the accommodation, facilities and infrastructure that enable Welsh speaking young people to work in their communities. Many predominantly Welsh-speaking areas are highly dependent on tourism for income and employment.

We have recently published an integrated impact assessment for tourism which, although was completed prior to the pandemic, it is still largely relevant.

The visitor economy contributes to health and wellbeing outcomes by supporting, promoting and improving access to leisure opportunities and tourism facilities and supports the UNCRC article requiring that all children and young people have a right to relax, play and to join in a wide range of activities.

The main prompted factor endorsed by UK staying visitors in 2019 in attracting them to come to Wales was to help them relax and escape from the stresses of life and over two thirds were very satisfied with their trip to Wales on that front. Moreover,

helping people get away from it all is one of the key drivers of satisfaction with Wales as a place to visit (alongside the quality of Wales' natural environment).¹⁹

A higher proportion of those taking day trips in Wales in 2019 were from C2DE social backgrounds than among overnight visitors (around one third compared with around one quarter).

The reopening of indoor attractions and amusement arcades will contribute directly or indirectly to wellbeing with positive impacts on the economy, cultural and social enrichment and health.

ECONOMIC IMPACTS

The Welsh Government has identified Tourism as a foundation sector, one of four, of the Welsh economy. It contributes 6% GVA to the Welsh economy. Data for 2019 demonstrates £6.0 billion of expenditure generated by tourism and in 2020 11% of businesses in Wales were in the tourism sector. This was higher in some areas with Gwynedd at 16%, Conwy at 15% and Anglesey, Pembrokeshire and Merthyr Tydfil at 14%.²⁰

Spending on leisure day trips is around £5bn per year, and trips to visitor attractions tend to account for around 3% of spending (around £150m-£200m per year).

Respondents to the '10 questions' consultation, for the WG Tourism Action Plan published in January 2020, felt that the economic impact of tourism made some rural communities viable, providing direct and indirect employment opportunities and enabled broader businesses not directly involved in tourism to supplement their income.

Attraction spending is less predictably spread throughout the year than accommodation, and monthly data in recent years has fluctuated, but a consistent peak period appears to be April to June. Attraction businesses who missed a significant proportion of their income last year have the opportunity to maximise their income for this year.

Visitor Attractions latest consumer data / distanced travelled to attractions:

24% of UK consumers intend to go on a day out to a visitor attraction within the next two weeks. The destinations of choice for day trippers are more likely to be rural or coastal in nature. Day trippers have higher representation amongst the pre-nester and family life stages compared to the overall UK adult population.

Visitor attractions drive tourism generally and, after government restrictions, the main reasons for lower public confidence in travel are having fewer places to eat and drink out, and fewer things to do and places to visit. Predominantly indoor or covered attractions remain likely to attract lower levels of interest than outdoor attractions compared to normal, being likely to see net 12% fewer visitors than usual, though this is moving back towards normal levels. Level of comfort with visiting an indoor

¹⁹ [Wales Visitor Survey 2019 – UK Staying Visitors report](#)

²⁰ Data source: ONS Inter-departmental Business Register 2020

attraction has remained unchanged in recent weeks (2.3 out of 4) whilst other activities such as using public transport, eating out and shopping show signs of slow increasing public comfort.²¹

The Association of Leading Visitor Attractions claims that in March this year around a quarter of the attraction visiting market said they would visit a historic house or sites, and museums or art galleries as soon as they are open, but at the time of surveying, the largest proportion - around 40% - said they would 'wait and see what happens' in the short term. 10% of the market claim that once they are given the first vaccine dose they will visit an attraction as soon as the opportunity arises, and following the successful roll-out of the vaccine since this survey, these intention figures may have improved. . Whilst there appears to be slightly more confidence in visiting outdoor based attractions than indoors, since late January there has been a drop in the proportion of the market who will feel more anxious than usual about using indoor attraction facilities after re-opening, including toilets and indoor cafes.²²

ENVIRONMENTAL IMPACTS

It is likely that the environmental impact will be neutral. The easements proposed are likely to result in more trips being taken by car. The increase in holidays within Wales would be offset by the likelihood of less air travel and thereby a reduction in emissions.

There are no obvious adaption or biodiversity impacts.

IMPACT ASSESSMENTS

Equality impacts

An assessment of impacts by protected characteristics is set out below. In general terms the proposal promotes equality as it removes restrictions on travel that will have affected different groups in different ways. Potential negative impacts relate to the risks of adaptations being made to outdoor attractions not fully taking into account the needs of different groups. These are primarily about equality of access.

<i>Protected characteristic or group</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate Impacts?</i>
<i>Age (think about different age groups)</i>	Positive: Re-opening more premises providing a greater range of services and attractions will be of benefit to all age	Evidence set out above on wellbeing and economic impacts highlights the estimated representation of this group as visitors and in the workforce.	Welsh Government has adopted a collaborative approach to developing guidance on re-opening sectors/services/facilities with stakeholders and industry. Therefore,

²¹ [Visit Wales UK Consumer Tracker: Wave 29, 19-23 April 2021](#)

²² [ALVA Attractions Recovery Tracker: Wave 7, 3-9 March 2021](#)

	<p>groups. Wales continues to be a popular destination for middle aged/older travellers and for those with disabilities. The age profile of holiday visitors to Wales is similar to GB as a whole with a skew towards middle age and older visitors.</p> <p>Younger people especially under 25s make up a relatively small proportion of overnight domestic holiday trips within GB as a whole, although Wales has a higher share of holiday trips taken in GB with children in the party reaching 13 % in 2018, compared to 10% share of holidays without children in party. 41% of overnight holiday trips taken by GB residents in Wales have children in their party with 2.6 million trips in 2018, many of these will be holidays by families living in Wales.</p> <p>The guidance for tourism and hospitality</p>		<p>comprehensive guidance to support safe implementation of measures is available for those areas where restrictions have been eased and will be prepared as appropriate for other premises as preparations are made for them to re-open.</p> <p>The Welsh Government’s “Culture and heritage destinations and venues: guidance for a phased return advises that organisations consider the rights of those with protected characteristics and how they will be able to continue to access venue / services safely and requests them to consider the age and clinical vulnerability of people in your workforce when thinking about Covid-19 related risk, This is reiterated in the guidance for tourism and hospitality businesses and the associated checklist.</p>
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	<p>businesses states that restrictions for older and clinically vulnerable members of society being advised to continue to shield will also have an impact on how organisations are able to address reopening.</p> <p>In terms of employees the share of employment in tourism is substantially higher for people aged 16-24. So measures could have beneficial distributional consequences for the young should it aid in the preservation of jobs and increasing household incomes for those who work in the sector (i.e. by receiving their full salary as they are transferred off furlough).</p> <p>Destinations and venues may also be able to provide valuable work experience for young people.</p>		
<i>Disability (think about</i>	Positive: 24% of overnight trips	As more premises re-open, from community	The Welsh Government's "Culture

<i>different types of disability)</i>	taken in Wales include someone in the party with a disability or other impairment in their party - slightly above the level for GB as a whole (20%).	centres to attractions, disabled people should benefit from being able to access a greater range of services and other opportunities. This will help to reduce loneliness and isolation; provide more access to support; and generally promote wellbeing.	<p>and heritage destinations and venues: guidance for a phased return and that provided to tourism and hospitality businesses notes that organisations should consider the rights of those with protected characteristics in terms of accessing venues or services. This is also included in the checklist for tourism businesses.</p> <p>e.g. to inform them of any changes to booking procedures or how the destination will assist people with disabilities so that they can continue to access the venue in a safe way.</p> <p>e.g. providing additional information to visually impaired visitors in advance of visits regarding changed access to buildings or sites and new and more complex visitor routes and generally by making all visitor information accessible</p> <p>The guidance also states that employers have statutory obligations towards disabled workers and must make reasonable adjustments to ensure that they are not put at a disadvantage.</p>
<i>Gender Reassignment (the act of transitioning)</i>	Unlikely to have an impact. A short evidence search was	Insufficient data available to form a proper assessment	

<i>and Transgender people)</i>	undertaken and there is no available, relevant secondary evidence or proxy data on the travel experiences and behaviour of this group.	As more premises open, people should generally benefit from more opportunities for safe social interaction and opportunities to access services, which will help to reduce loneliness and isolation; provide more access to support; and generally promote wellbeing.	
<i>Pregnancy and maternity</i>	Re-opening more businesses such as tourist attractions will provide a greater range of activities which mothers/carers may be able to take young children to enjoy.	As more premises open, they will generally benefit from more opportunities for safe social interaction and opportunities to access services, which will help to reduce loneliness and isolation; provide more access to support; and generally promote wellbeing.	<p>The Welsh Government's "Culture and heritage destinations and venues: guidance for a phased return advises that organisations consider the rights of those with protected characteristics and how they will be able to continue to access your venue / services safely.</p> <p>The Guidance for tourism and hospitality business highlights that risk assessments are a legal requirement for pregnant women, no matter the size of the business and that employers have a statutory duty towards new or expectant mothers.</p>
<i>Race (include different ethnic minorities, Gypsies and Travellers and Migrants, Asylum seekers and Refugees)</i>	<p>Neutral as visitors.</p> <p>Positive: In terms of employees, the share of employment in tourism is substantially higher for people with BAME backgrounds and</p>	Data was pooled from 2016-2018 from the GBTS and GBDVS surveys to understand any differences in motivations between white and BAME visitors to Wales from within Great Britain. For overnight visitors, the main motivations to	<p>Consistent and clear messaging needs to be maintained reminding BAME people of the risks that COVID-19 poses.</p> <p>The Welsh Government's "Culture and heritage destinations and</p>

	<p>therefore, as more relevant businesses are allowed to re-open they should help the preservation of jobs and increase household incomes for those who work in the sector (i.e. by receiving their full salary as they are transferred off furlough).</p>	<p>travel followed a similar pattern with white and BAME visitors mainly travelling for holiday/pleasure/leisure (63% compared to 54%) followed by visiting family and relatives (26% compared to 28%) and then business travel (8% compared to 12%). The most frequent reason for day visits for both white and BAME visitors were visiting friends and family (23% compared to 19%).</p>	<p>venues: guidance for a phased return advises that organisations consider the rights of those with protected characteristics and how they will be able to continue to access venues/services safely.</p> <p>The guidance also advises the use of simple, clear and accessible messaging to explain guidelines, with consideration of groups whose first language may not be Welsh or English.</p> <p>The tourism guidance states that to treat employees fairly steps should be taken to understand, involve and take into account the particular circumstances of those with protected characteristics. This is also included in the associated checklist.</p> <p>It also requires that the risk assessment pays particular regard to whether the people doing the work are especially vulnerable to COVID19 and to put in place steps to protect them.</p>
<p><i>Religion, belief and non-belief</i></p>	<p>Unlikely to have an impact.</p>	<p>Data on religion of visitors to tourist attraction not collected via official surveys. A short evidence search was undertaken and there is no available, relevant secondary evidence or proxy data</p>	<p>The Welsh Government’s “Culture and heritage destinations and venues: guidance for a phased return advises that organisations consider the rights of those with protected</p>

		<p>on the travel experiences and behaviour of this group.</p>	<p>characteristics and how they will be able to continue to access your venue / services safely.</p> <p>The tourism guidance states that to treat employees fairly steps should be taken to understand, involve and take into account the particular circumstances of those with protected characteristics. This is also included in the associated checklist.</p> <p>It also states that the steps that will usually need to be taken include ensuring you do not have an unjustifiable negative impact on some groups compared to others, for example those with religious commitments.</p>
<i>Sex / Gender</i>	<p>Typically, tourism employs more women than men.</p> <p>Therefore, as more relevant businesses are allowed to re-open they should help the preservation of jobs and increase household incomes for those who work in the sector (i.e. by receiving their full salary as they are transferred off furlough).</p>	<p>Opportunities to return to employment will help reduce anxieties associated with lockdown including financial worries.</p>	<p>The Welsh Government's "Culture and heritage destinations and venues: guidance for a phased return advises that organisations consider the rights of those with protected characteristics and how they will be able to continue to access your venue / services safely.</p> <p>The tourism guidance states that to treat employees fairly steps should be taken to understand, involve and take into account the particular circumstances of those with protected characteristics. This is</p>

			<p>also included in the associated checklist.</p> <p>It also states that steps that will usually need to be taken include ensuring that you do not have an unjustifiable negative impact on some groups compared to others, for example those with caring responsibilities.</p>
<p><i>Sexual orientation (Lesbian, Gay and Bisexual)</i></p>	<p>Proxy information is available via research into LGBT visitors to Scotland²³. It is assumed that these findings would also be applicable to Wales. The influences on taking a trip to Scotland are similar for LGBT visitors as with other visitors. However, they also have to think about a range of other factors not necessarily always important to non-LGBT travellers. These often include how welcome they would be at certain destinations, how they would be treated at their accommodation and even how safe they would be walking down the</p>	<p>In respect of tourism, in a survey by 'VisitScotland', perceptions of LGBT friendly destinations around the world, the UK was ranked 12 out of 15 spontaneously mentioned destinations.</p>	<p>The Welsh Government's "Culture and heritage destinations and venues: guidance for a phased return advises that organisations consider the rights of those with protected characteristics and how they will be able to continue to access your venue / services safely.</p> <p>The tourism guidance states that to treat employees fairly steps should be taken to understand, involve and take into account the particular circumstances of those with protected characteristics. This is also included in the associated checklist.</p>

²³ Visit Scotland (2014). LGBT Research. <https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/lgbt-topic-paper-july-2014.pdf>

	<p>street; all of which are fundamental considerations that influence destination choices for LGBT visitors. In terms of perceptions of LGBT friendly destinations around the world, the UK was ranked 12 out of 15 spontaneously mentioned destinations. Whilst the perception of being welcome in Scotland is quite high among Scottish LGBT visitors (82%), there is still room for improvement among LGBT individuals from the rest of the UK (67%) and abroad (68%).</p>		
<i>Marriage and civil partnership</i>	<i>No differential impact identified</i>	<i>As more premises open, couples should generally benefit from more opportunities for safe social interaction and opportunities to access services, which will should promote wellbeing.</i>	The tourism guidance states that to treat employees fairly steps should be taken to understand, involve and take into account the particular circumstances of those with protected characteristics. This is also included in the associated checklist.
<i>Children and young people up to the age of 18</i>	Positive: Will provide increased opportunities to engage in a range of different activities and provide opportunities for more social	The survey ' Coronavirus and Me ' of approx. 23,000 children and young people in Wales provides some insight into their experiences of the coronavirus pandemic and their	No mitigation required.

	interaction for young people.	reactions, hopes and concerns for the future (Article 12, UNCRC).	
Low-income households	The National Survey for Wales 2018/19 found that 21% of respondees would like a holiday away from home (for at least a week not staying at relatives) but cannot afford it. This is likely to be exacerbated with financial constraints at this time. Attractions and day visits may provide an alternative for some.		Attractions that are local and/or free entry will be more accessible to low income households who may be unable to travel far from their home. Welsh Government guidance on reopening cultural and heritage destinations and venues advises making provision to allow bookings from people who do not have access to the Internet.

United Nations Convention on the Rights of the Child

The opening of outdoor attractions supports the requirement that all children and young people have a right to relax, play and to join in a wide range of activities. Outdoor attractions form part of the provision of experiences and facilities that will be family-orientated that will maximise the outcomes that can be delivered for children and young people.

Welsh Language

There are approximately 150,000 people directly employed in the visitor economy - around 12% of the workforce. The economy is integral to creating the social conditions where Welsh speakers can stay in Welsh-speaking communities, or return to those communities. Many predominantly Welsh-speaking areas are highly dependent on tourism for income and employment. A high percentage of tourism businesses are located in Welsh-speaking areas – for example over a third of tourism accommodation businesses are located in local authority areas where more than 40% of the population speak Welsh as a first language

Welsh speaking communities will benefit from the continuing operation of tourism attractions which in turn will help create and safeguard employment, potentially encouraging Welsh speakers to stay and work there, and thus maintain the viability of the language.

The Welsh Government Guidance “Culture and Heritage venues: guidance for a phased return advises that organisations consider how you will continue to comply with Welsh language duties when implementing any changes in your activities / service.

iv. Theatres and Concert Halls

WELLBEING IMPACTS

It is understood that there is a strong link between participation and engagement with culture, and improved mental and physical wellbeing. **Recent data from the National Survey for Wales (2018/2019)²⁴ reveals that participation and attendance at arts events in Wales remains high, with 80% of the adults interviewed having participated in arts, and 73% having attended an arts event in the last 12 months. We also know that this engagement is often localised, emphasising the important role of the arts in communities.**

The What Works Centre for Wellbeing identifies strong evidence that participatory arts, sport, and cultural activities can improve wellbeing when they bring together participants in the same physical space²⁵. The restrictions for individuals associated with the lockdown measures, may limit the associated benefits of participating in arts, sport and culture together.

The Welsh Government has recently undertaken research which robustly examined the relationship between culture and wellbeing²⁶. By analysing the latest results from the National Survey for Wales, the research identified that health and wellbeing factors were positively impacted depending on individuals’ access to arts and culture. Critically, the research found that attendance or participation in cultural activities plays a role in predicting if someone will report high well-being. The benefits arising from these activities have clearly been reduced due to the reduced ability of the public to engage in cultural activities.

The visitor economy contributes to health and wellbeing outcomes by supporting, promoting and improving access to outdoor leisure opportunities and tourism facilities and supports the UNCRC article requiring that all children and young people have a right to relax, play and to join in a wide range of activities.

There are positive impacts on social and psychological well-being from the provision and use of theatres and concert halls. Their visible re-opening will provide destinations for visitors and help foster a sense of return to ‘normality’.

ECONOMIC IMPACTS

²⁴ [National Survey for Wales: Results Viewer](#)

²⁵ https://whatworkswellbeing.org/blog/places-spaces-and-loneliness-what-matters-for-participatory-art-and-sport/?mc_cid=c975bde8f8&mc_eid=e4236b0dbe

²⁶ [Welsh Government: Exploring the Relationship between Culture and Wellbeing](#)

The coronavirus pandemic has had a severe impact on economic performance, unlike anything the UK economy has experienced in modern times - the Arts, entertainment, and recreation sectors have been particularly hard hit.

The restrictions that have been implemented to contain Covid-19 across the UK have had particularly disproportionate impacts on firms that reside within the social, cultural, and visitor economies of the four nations. This is because these are areas of the economy that are most disrupted by measures designed to limit population movement and social congregation.

The Business Insights and Conditions Survey²⁷ provides insights to the effects of restrictions across the UK on the broad *Arts, Entertainment, and Recreation* sector. The latest wave (Wave 29) identifies that 63% of businesses across the UK in *Arts, Entertainment, and Recreation* have been trading for the last 2 weeks. This is the third lowest figure across all sectors, with only *Accommodation and Food Services* and *Other Service Activities* having a lower proportion of businesses trading. As expected this sector also reported having the significant drops in business turnover, with 40.1% of arts, entertainment, and recreation sector businesses reporting their turnover had decreased by more than 50% compared to normal expectations for this time of year.

The Business Insights and Conditions Survey provides insights to the effects of restrictions across the UK on the broad Arts, Entertainment, and Recreation sector. The latest wave (Wave 29) identifies that 63% of businesses across the UK in Arts, Entertainment, and Recreation have been trading for the last 2 weeks. This is the third lowest figure across all sectors, with only Accommodation and Food Services and Other Service Activities having a lower proportion of businesses trading. As expected this sector also reported having the significant drops in business turnover, with 40.1% of arts, entertainment, and recreation sector businesses reporting their turnover had decreased by more than 50% compared to normal expectations for this time of year.

Many companies are utilising the UK Government Coronavirus Job Retention Scheme to furlough staff or other forms of support. The CJRS ensures that should workers be furloughed that the UK Government will guarantee 80% of their normal salaried income (with employers allowed to top up at their discretion). As at 28 February 2021, 177,400 employments in Wales were furloughed under the CJRS. This is a take up rate of 14% - slightly lower than the take up rate across the UK of 15%²⁸. There are concerns that a lack of clarity around removing restrictions could lead to staff redundancies as firms face taking on financial responsibility for their payrolls while at the same time facing significant reductions in their revenues. The data showed that the *Arts, Entertainment, Recreation and Other Services* sector had the second and third highest take-up rates at 57% and 42% respectively.

There will be positive economic benefits from the reopening of theatres and concert halls, although in comparative terms these will be relatively modest, especially in light of restrictions on customer numbers.

²⁷<https://www.ons.gov.uk/economy/economicoutputandproductivity/output/datasets/businessinsightsandimpactontheukeconomy>

²⁸ Coronavirus Job Retention Scheme statistics: March 2021

There is evidence that suggests that consumer demand is increasing ahead of anticipated reductions in restrictions. About two thirds (65%) of businesses are taking advance bookings, knowing that there is not yet a confirmed date for their sector to reopen. The taking of bookings is most prevalent in the self-catering sector – most (78%) are doing so²⁹. However, advance bookings for this year are currently well down on normal.

A recent survey from Ipsos Mori³⁰ of UK adults identified that around half of respondents would be happy visiting an indoor exhibition (51%) and going to bars and restaurants (50%). Using public toilets and transport continue to divide opinion. Almost 4 in 10 would feel comfortable using these public facilities (39% and 37% respectively), while 45% and 42% would be uncomfortable doing so. Indoor cinemas, theatres, gyms, swimming pools and leisure centres also split opinions. Just under 4 in 10 (38%) would feel comfortable going to cinemas and theatres as they did before the pandemic hit, 42% would not.

ENVIRONMENTAL IMPACTS

While the Welsh Government continues to promote active travel as an alternative to other forms of travel throughout the coronavirus pandemic and beyond, wider reopening of the sector will likely expand the reasons for members of the public to travel by private vehicle (especially so given restraints to effective public transport capacity).

While no forecasts are available as to what the knock on effect will be to air quality, it can be expected to have a negative impact when compared to recent months, in which air quality is believed to have improved. For this reason, officials in Environment and Rural Affairs are monitoring the impacts on air quality that have arisen since lockdown measures were introduced. External consultants have been commissioned to analyse the impacts and this work will inform future policy with a view to retaining air quality improvements for the future, as far as possible.

EQUALITY IMPACTS

An assessment of impacts by protected characteristics is set out below. Increasing the range of recreational activities available for individuals to engage should have positive impacts across all protected groups.

<i>Protected characteristic or group</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate Impacts?</i>
<i>Age (think about different age groups)</i>	Positive: Reopening theatres and concert halls will offer a wide	Evidence set out above on wellbeing highlights	Welsh Government has adopted a collaborative approach to developing

²⁹ Wales Tourism Business Barometer – Wave 6 Report – March 18 2021

³⁰ <https://www.ipsos.com/ipsos-mori/en-uk/number-people-completely-following-covid-19-restrictions-falls-especially-among-55-75-year-olds>

	range of opportunities for people of all ages to access these facilities.	the evidence around this decision.	guidance on re-opening sectors/services/facilities with stakeholders and industry. Therefore, comprehensive guidance to support safe implementation of measures is available for those areas where restrictions have been eased and will be prepared as appropriate for other premises as preparations are made for them to re-open.
<i>Disability (think about different types of disability)</i>	Positive: Data from the 2019 Wales Visitor Survey shows 13% of UK day visitor groups in 2019 included someone with a disability: 6% had a mobility impairment, 5% a long-term illness, 3% a hearing impairment, 2% had learning difficulties and 1% a sight impairment. This is similar to the incidence among the UK population (estimated at 12%).	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening theatres and concert halls will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing.	N/A
<i>Gender Reassignment (the act of transitioning and Transgender people)</i>	No differential impact identified.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening theatres and concert halls will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing	N/A
<i>Pregnancy and maternity</i>	Positive: Re-opening more businesses such as indoor tourist attractions will also provide a greater range of activities which	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening theatres and	<i>As above.</i>

	mothers/carers may be able to take young children to enjoy	concert halls will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing.	
<i>Race (include different ethnic minorities, Gypsies and Travellers and Migrants, Asylum seekers and Refugees)</i>	No differential impacts identified.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening theatres and concert halls will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing.	N/A
<i>Religion, belief and non-belief</i>	No differential impacts identified.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening theatres and concert halls will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing.	N/A
<i>Sex / Gender</i>	No differential impacts identified.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening theatres and concert halls will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing.	N/A

<p><i>Sexual orientation (Lesbian, Gay and Bisexual)</i></p>	<p>No differential impact identified.</p>	<p>Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening theatres and concert halls will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing.</p>	<p>N/A</p>
<p><i>Marriage and civil partnership</i></p>	<p>No differential impact identified</p>	<p>Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening theatres and concert halls will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing.</p>	<p>N/A</p>
<p><i>Children and young people up to the age of 18</i></p>	<p>Positive: Easements should provide increased opportunities to engage in a range of different activities and provide opportunities for more social interaction.</p> <p>Wales has a higher share of holiday trips taken in GB with children in the party reaching 13 % in 2018, compared to 10% share of holidays without children in party. 41% of overnight holiday trips taken by GB residents in Wales have children in their party with 2.6 million trips in 2018, many of these will be</p>	<p>Holiday data taken from 2018 Attractions Survey for Wales.</p>	<p>As above.</p>

	holidays by families living in Wales.		
Low-income households	No differential impact identified.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening theatres and concert halls will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing.	N/A

Human Rights and UN Conventions

The overriding purpose of the restrictions in the round is the protection of the right to life and any changes must be considered in this context. The changes proposed make a contribution to the right to live your life privately without government interference, by removing restrictions that could interfere with a person's private and family life.

United Nations Convention on the Rights of the Child

The convention has been considered in this assessment. The restrictions on theatres and concert halls could conflict principally with the following Article:

- **Article 31** – All children have a right to relax and play, and to join in a wide range of activities.

Easing related restrictions would enable the Welsh Government to meet its obligations under this article in particular. Theatres and concert halls are a popular part of leisure time for family holidays.

Welsh Language

The proposals to allow cultural and tourism premises such as theatres and concert halls to open are not known to have any identifiable negative impacts on the Welsh Government's aim to increase the number of Welsh speakers, promote the use of the Welsh language, and create favourable conditions for the Welsh language, as set out in **Cymraeg 2050: A million Welsh speakers**. Theatres and concert halls play a role in providing opportunities for their users, including children and learners, to experience content made in the Welsh language.

v. Museums and Galleries

WELLBEING IMPACTS

Children and adults alike will benefit from increased access to museum services. Museums are valuable community assets and making them available provides important physical and mental health benefits.

The reopening of museums will contribute directly or indirectly to wellbeing with positive impacts on cultural and social enrichment and health.

By simply visiting a local museum in Wales, feelings of wellbeing increase by between 14%-28% (UCL Museum Wellbeing Measures). Museums deliver a range of activities to support mental wellbeing and health self-management. They offer a range of creative and social activities, volunteering opportunities and dementia friendly programmes which engage and connect individuals and communities, combat loneliness and improve wellbeing.

ECONOMIC IMPACTS

The museum sector in Wales comprises independent, local authority and national museums. All to a greater or lesser degree rely on income generation to fund services. It was conservatively estimated that the museum sector brought at least £80m into the Welsh economy in 2014. Retail outlets close to a museum benefit from this proximity in terms of increased visits and usage, and museums stock their shops and selling exhibitions with local suppliers, artists and craftspeople.

The Federation of Museums and Art Galleries of Wales estimated that the independent museum sector had lost £820,000 of income and the local authority sector £800,000 in the first quarter of the first lockdown alone.

There will therefore be economic benefits for museums to be able to reopen, both for their own institutions and the wider economy.

There may be some resource implications for museums in revising their risk and impact assessments and the staffing and equipment required to reopen. For some, this will mean it will be financially unviable to reopen with projected decreases in visitor figures.

ENVIRONMENTAL IMPACTS

While the Welsh Government continues to promote active travel as an alternative to other forms of travel throughout the coronavirus pandemic and beyond, wider reopening of the sector will likely expand the reasons for members of the public to travel by private vehicle (especially so given restraints to effective public transport capacity). Mobility data suggests that while travel dropped significantly when lockdown restrictions were introduced, they have gradually increased as lockdown restrictions have been removed, including travel for retail and recreation (although they are still, for the majority of metrics, below their pre-lockdown levels).

While no forecasts are available as to what the knock on effect will be to air quality, it can be expected to have a negative impact when compared to recent months, in

which air quality is believed to have improved. For this reason, officials in Environment and Rural Affairs are monitoring the impacts on air quality that have arisen since lockdown measures were introduced. External consultants have been commissioned to analyse the impacts and this work will inform future policy with a view to retaining air quality improvements for the future, as far as possible.

EQUALITY IMPACTS

An assessment of impacts by protected characteristics is set out below. The proposed easement has been identified as having possible positive impacts on older individuals and children, including specifically those from lower socio-economic backgrounds.

<i>Protected characteristic or group</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate Impacts?</i>
<i>Age (think about different age groups)</i>	Positive: Reopening museums and galleries will offer a wide range of opportunities for people of all ages to access museum services and collections.	Evidence set out above on wellbeing highlights the evidence around this decision.	Welsh Government has adopted a collaborative approach to developing guidance on reopening libraries and archive services sectors working with the Federation of Museums and Art Galleries of Wales and Amgueddfa Cymru National Museum Wales Therefore, comprehensive guidance has been prepared to support the safe reopening of museums and galleries.
<i>Disability (think about different types of disability)</i>	Positive: many museums have accessible displays and additional formats to ensure access to visits and collections for those with different disabilities.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening museums will increase opportunities for safe social interaction, thereby reducing loneliness	As above

		and isolation; and promoting better mental wellbeing.	
<i>Gender Reassignment (the act of transitioning and Transgender people)</i>	No differential impact expected.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening museums will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing	N/A
<i>Pregnancy and maternity</i>	No differential impact expected.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening museums will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing	N/A
<i>Race (include different ethnic minorities, Gypsies and Travellers and Migrants, Asylum seekers and Refugees)</i>	Positive: many museums work with local diverse communities to provide activities and interpret diverse histories in their displays. Being able to access these services will be beneficial for both those specific community groups and the wider community.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening museums will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing.	N/A
<i>Religion, belief and non-belief</i>	No differential impact expected.	Allowing more opportunities to engage in cultural activities is considered to be positive for	N/A

		everyone; reopening museums will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing	
<i>Sex / Gender</i>	No differential impact expected.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening museums will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing	N/A
<i>Sexual orientation (Lesbian, Gay and Bisexual)</i>	No differential impact expected.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening museums will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing	N/A
<i>Marriage and civil partnership</i>	No differential impact expected.	N/A	N/A
<i>Children and young people up to the age of 18</i>	Positive: The proposed easement will have a positive impact on children and young people who will be able to benefit from the reopening of museum services.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening museums will increase opportunities for safe social interaction, thereby	

	The easement will benefit children and young people in terms of accessing family friendly activities, free entry to museums and those who wish to engage in community history/heritage projects etc.	reducing loneliness and isolation; and promoting better mental wellbeing	
<i>Low-income households</i>	Positive: Many local museums are at the heart of communities across Wales and are particularly important, as offering free access and activities to people in low income households.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening museums will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing	N/A

Human Rights and UN Conventions

The overriding purpose of the restrictions in the round is the protection of the right to life and any changes must be considered in this context. The changes proposed make a contribution to the right to live your life privately without government interference, by removing restrictions that could interfere with a person’s private and family life.

United Nations Convention on the Rights of the Child (UNCRC)

The convention has been considered in this assessment. The restrictions on museums could conflict principally with the following Articles:

- **Article 15** – Children have the right to meet together and to join groups and organisations, as long as this does not stop other people from enjoying their rights.
- **Article 29** - Education should help develop every child’s personality, talents and mental and physical abilities to the full. It should develop children’s respect for their own rights and those of others, for their parents, for their own culture and the cultures of others, and for the natural environment
- **Article 31** – All children have a right to relax and play, and to join in a wide range of activities.

The proposed easement could therefore allow us to better meet our obligations under the UNCRC.

Welsh Language

The measures described above do not have any identifiable negative impacts on the Welsh Government's aim to increase the number of Welsh speakers, promote the use of the Welsh language, and creating favourable conditions for the Welsh language, as set out in **Cymraeg 2050: A million Welsh speakers**. Museums play a vital role in providing opportunities for their users including children and learners to access Welsh-language materials, participate in Welsh-language activities and explore the heritage of the language.

- vi. Cinemas

WELLBEING IMPACTS

Children and adults alike will benefit from increased access to cinemas. Cinemas are valued cultural and community assets and making them available provides important mental health benefits.

The Welsh Government has recently undertaken research which robustly examined the relationship between culture and wellbeing³¹. By analysing the latest results from the National Survey for Wales, the research identified that health and wellbeing factors were positively impacted depending on individuals' access to arts and culture. Critically, the research found that attendance or participation in cultural activities plays a role in predicting if someone will report high well-being. The benefits arising from these activities have clearly been reduced due to the reduced ability of the public to engage in cultural activities.

The reopening of cinemas will contribute directly or indirectly to wellbeing with positive impacts on cultural and social enrichment and health. Cinemas are part of the visitor economy, which contributes to health and wellbeing outcomes by supporting, promoting and improving access to leisure opportunities and tourism facilities and supports the UNCRC article requiring that all children and young people have a right to relax, play and to join in a wide range of activities.

There are positive impacts on social and psychological well-being from the provision and use of cinemas. Their visible re-opening will provide destinations for visitors and help foster a sense of return to 'normality'.

ECONOMIC IMPACTS

The coronavirus pandemic has had a severe impact on economic performance, unlike anything the UK economy has experienced in modern times- the Arts, entertainment, and recreation sectors have been particularly hard hit.

³¹ [Welsh Government: Exploring the Relationship between Culture and Wellbeing](#)

The restrictions that have been implemented to contain Covid-19 across the UK have had particularly disproportionate impacts on firms that reside within the social, cultural, and visitor economies of the four nations. This is because these are areas of the economy that are most disrupted by measures designed to limit population movement and social congregation.

Cinemas in Wales have been and continue to receive support from the Welsh Government's Culture Recovery Fund. Those within larger arts centres may also have received assistance from the Culture Recovery Fund delivered via the Arts Council of Wales.

The Business Insights and Conditions Survey³² provides insights to the effects of restrictions across the UK on the broad *Arts, Entertainment, and Recreation* sector. The latest wave (Wave 29) identifies that 63% of businesses across the UK in *Arts, Entertainment, and Recreation* have been trading for the last 2 weeks. This is the third lowest figure across all sectors, with only *Accommodation and Food Services* and *Other Service Activities* having a lower proportion of businesses trading. As expected this sector also reported having the significant drops in business turnover, with 40.1% of arts, entertainment, and recreation sector businesses reporting their turnover had decreased by more than 50% compared to normal expectations for this time of year.

Many companies are utilising the UK Government Coronavirus Job Retention Scheme to furlough staff or other forms of support. The CJRS ensures that should workers be furloughed that the UK Government will guarantee 80% of their normal salaried income (with employers allowed to top up at their discretion). As at 28 February 2021, 177,400 employments in Wales were furloughed under the CJRS³³. There are concerns that a lack of clarity around removing restrictions could lead to staff redundancies as firms face taking on financial responsibility for their payrolls while at the same time facing significant reductions in their revenues. The data showed that the *Arts, Entertainment, Recreation and Other Services* sector had the second and third highest take-up rates at 57% and 42% respectively.

There will be positive economic benefits from the reopening of cinemas, although in comparative terms these will be relatively modest, especially in light of restrictions on customer numbers.

There is evidence that suggests that consumer demand is increasing ahead of anticipated reductions in restrictions. A recent survey from Ipsos Mori³⁴ of UK adults identified that just under 4 in 10 (38%) would feel comfortable going to cinemas and theatres as they did before the pandemic hit and 42% would not, a Cinema First Survey for the UK Cinema Association³⁵ showed 59% of respondents citing cinema-going as their most missed out-of-home entertainment activity.

³² <https://www.ons.gov.uk/economy/economicoutputandproductivity/output/datasets/businessinsightsandimpactontheukeconomy>

³³ <https://www.gov.uk/government/statistics/coronavirus-job-retention-scheme-statistics-6-may-2021/coronavirus-job-retention-scheme-statistics-6-may-2021>

³⁴ <https://www.ipsos.com/ipsos-mori/en-uk/number-people-completely-following-covid-19-restrictions-falls-especially-among-55-75-year-olds>

³⁵ [UK audiences eager to return to the big screen, survey confirms | UK Cinema Association \(cinemauk.org.uk\)](https://www.cinemauk.org.uk/audiences-eager-to-return-to-the-big-screen-survey-confirms)

ENVIRONMENTAL IMPACTS

While the Welsh Government continues to promote active travel as an alternative to other forms of travel throughout the coronavirus pandemic and beyond, wider reopening of the sector will likely expand the reasons for members of the public to travel by private vehicle (especially so given restraints to effective public transport capacity). Mobility data suggests that while travel dropped significantly when lockdown restrictions were introduced, they have gradually increased as lockdown restrictions have been removed, including travel for retail and recreation (although they are still, for the majority of metrics, below their pre-lockdown levels).

While no forecasts are available as to what the knock on effect will be to air quality, it can be expected to have a negative impact when compared to recent months, in which air quality is believed to have improved. For this reason, officials in Environment and Rural Affairs are monitoring the impacts on air quality that have arisen since lockdown measures were introduced. External consultants have been commissioned to analyse the impacts and this work will inform future policy with a view to retaining air quality improvements for the future, as far as possible.

EQUALITY IMPACTS

An assessment of impacts by protected characteristics is set out below. The proposed easement has been identified as having possible positive impacts on older individuals and children, including specifically those from lower socio-economic backgrounds.

<i>Protected characteristic or group</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate Impacts?</i>
<i>Age (think about different age groups)</i>	Positive: Reopening cinemas will offer a wide range of opportunities for people of all ages to access cinemas.	Evidence set out above on wellbeing highlights the evidence around this decision.	Welsh Government has adopted a collaborative approach to developing guidance on reopening cinemas, working with the UK Cinema Association and Ffilm Cymru. Comprehensive guidance has been prepared to support the safe reopening of cinemas.
<i>Disability (think about</i>	Positive: Many cinemas have rampways / adapted	Allowing more opportunities to engage in cultural	As above

<i>different types of disability)</i>	seating and present screenings in a variety of formats or with adapted equipment available to ensure accessibility for those with different disabilities.	activities is considered to be positive for everyone; reopening cinemas will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing.	
<i>Gender Reassignment (the act of transitioning and Transgender people)</i>	No differential impact expected.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening cinemas will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing	N/A
<i>Pregnancy and maternity</i>	No differential impact expected.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening cinemas will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing	N/A
<i>Race (include different ethnic minorities, Gypsies and Travellers and Migrants, Asylum seekers and Refugees)</i>	No differential impact expected.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening cinemas will increase opportunities for safe social interaction, thereby reducing loneliness and	N/A

		isolation; and promoting better mental wellbeing.	
<i>Religion, belief and non-belief</i>	No differential impact expected.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening cinemas will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing	N/A
<i>Sex / Gender</i>	No differential impact expected.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening cinemas will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing	N/A
<i>Sexual orientation (Lesbian, Gay and Bisexual)</i>	No differential impact expected.	Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening cinemas will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing	N/A
<i>Marriage and civil partnership</i>	No differential impact expected.	N/A	N/A

<i>Children and young people up to the age of 18</i>	<p>Positive: The proposed easement will have a positive impact on children and young people who will be able to benefit from the reopening of cinemas.</p> <p>The easement will benefit children and young people in terms of accessing family friendly activities and enhancing the availability of a range of different activities.</p>	<p>Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening cinemas will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing</p>	
<i>Low-income households</i>	<p>No differential impact expected.</p>	<p>Allowing more opportunities to engage in cultural activities is considered to be positive for everyone; reopening cinemas will increase opportunities for safe social interaction, thereby reducing loneliness and isolation; and promoting better mental wellbeing</p>	N/A

Human Rights and UN Conventions

The overriding purpose of the restrictions in the round is the protection of the right to life and any changes must be considered in this context. The changes proposed make a contribution to the right to live your life privately without government interference, by removing restrictions that could interfere with a person’s private and family life.

United Nations Convention on the Rights of the Child (UNCRC)

The convention has been considered in this assessment. The restrictions on cinemas could conflict principally with the following Articles:

- **Article 15** – Children have the right to meet together and to join groups and organisations, as long as this does not stop other people from enjoying their rights.

- **Article 31** – All children have a right to relax and play, and to join in a wide range of activities.

The proposed easement could therefore allow us to better meet our obligations under the UNCRC.

Welsh Language

The measures described above are not known to have any identifiable negative impacts on the Welsh Government’s aim to increase the number of Welsh speakers, promote the use of the Welsh language, and creating favourable conditions for the Welsh language, as set out in **Cymraeg 2050: A million Welsh speakers**. Cinemas play a role in providing opportunities for their users, including children and learners, to experience content made in the Welsh language.

vii. Remaining Accommodation

WELLBEING IMPACTS

Public Health Wales’ *Public Engagement Survey* conducted in early March found that 27 per cent of people reported worrying ‘a lot’ about their mental health and wellbeing over the previous week. Almost half (45%) said their physical fitness was worse than this time last year and three in five said their social relationships had worsened.³⁶ The mental health charity Mind published survey evidence in June last year suggesting that more than half of adults and young people in the UK had experienced a deterioration in their mental health as restrictions have remained in place, with young adults being worse affected.³⁷ More recent research by mental health charity the Mental Health Foundation found that over half of UK adults were experiencing anxiety or worry due to the pandemic. The research found that this was more common among women, students, and those who were unemployed; and that younger people and single parents were reporting higher levels of loneliness.³⁸ It is well-established that unemployment is associated with low levels of wellbeing and worsening health. Increasingly, adverse effects will also be felt by new entrants to the labour market should they enter the labour market during an economic downturn. There is academic evidence that adverse labour market experiences in recession can have life-long effects on the economic, health, wellbeing and even life-expectancy of young people.³⁹

ECONOMIC IMPACTS

General economic impacts

In 2018 the whole of the *Accommodation* sector was worth £820 million of gross value added (GVA) to the Welsh economy, equivalent to 1.3% total GVA for the

³⁶ [Public Engagement Survey on Health and Wellbeing during Coronavirus Measures](#): Week 48 (1-7 March 2021), Public Health Wales

³⁷ Mind (2020) *The mental health emergency: How has the coronavirus pandemic impacted our mental health?*

³⁸ Mental Health Foundation: [Coronavirus: mental health and the pandemic Wave 9: December 2020](#)

³⁹ See: <https://voxeu.org/article/impact-covid-19-chronic-health-uk>

same year. In 2019 the sector employed approximately 32,000 across Wales⁴⁰ and there were 1,855 branches of accommodation business across Wales.

The ONS have reported that UK annual Gross Domestic Product (GDP) fell by 9.9% in 2020, and the *Accommodation and Food Services* sector showed negative growth of 44%. The *Accommodation* sector was particularly impacted, seeing a 73% fall in output between February and December 2020⁴¹. Hostels in Wales, which over the last few years have reported steady, strong bed occupancy rates and reported 54% occupancy in 2019 saw an average of only 10% bedspace occupancy in 2020. Similarly, touring caravan pitch occupancy was 43% in 2019 but only 32% in 2020.⁴²

The ONS' Business Insights and Conditions Survey (BICS) provides insights to the effects of restrictions across the UK on the broad *Accommodation and Food Service Activities* sector.⁴³ Along with *Arts, Entertainment, and Recreation* it remains one of the areas of the UK economy that has been most severely impacted throughout the health pandemic and associated restrictions. 8 in 10 UK businesses were trading in late April 2021 but only 6 in 10 *Accommodation and Food Service Activities* businesses were trading during this period, though the number of open Arts, Entertainment and Recreation businesses had moved in line with the UK average.⁴⁴ As expected these two sectors continue to report having the most significant drops in business turnover, with 6 in 10 *Accommodation and Food services* businesses and two thirds of *Arts, Entertainment and Recreation* businesses reporting a decrease in turnover vs normal, compared with a third of UK businesses overall.⁴⁵

Given the complications around international passenger travel, as well as consumer anxieties, VisitBritain have forecast that inbound visits to the UK will show a decline of 76% from the levels seen in 2019 and predict 71% fewer inbound visits to the UK in 2021, although caution should be taken with this figure given the difficulties in accurately modelling impacts.⁴⁶ Nevertheless the outlook for international tourism is negative and this could have significant impacts on the accommodation sector this summer should domestic demand fail to compensate.

Employment and Income Effects

Many companies are utilising the UK Government Coronavirus Job Retention Scheme to furlough staff or other forms of support. The CJRS ensures that should workers be furloughed that the UK Government will guarantee 80% of their normal salaried income (with employers allowed to top up at their discretion). According to the BICS survey of mid-April just under 4 in 10 workers within the *Accommodation and Food Service Activities* sector were estimated to be furloughed in the UK, as

⁴⁰ BRES data will be used for employment figures. 2019 data for SIC group 55: Accommodation

⁴¹ ONS [GDP published 12 February 2021](#).

⁴² Visit Wales [Accommodation Occupancy report 2019](#)

⁴³ Covering 25 January - 7 February 2021.

⁴⁴ The percentage of businesses in the UK reporting that they were continuing to trade was 61% for the Accommodation and Food Services sector, 78% for the Arts, Entertainment, and Recreation sector, and the UK all-sector average was 83%.

⁴⁵ The percentage of businesses in the UK reporting a loss in turnover was 61% for the Accommodation and Food Services sector, 67% for the Arts, Entertainment and Recreation sector, and 34% for the all-sector UK average.

⁴⁶ VisitBritain (2020) 2020 tourism forecast [online]. <https://www.visitbritain.org/2020-tourism-forecast>

were 4 in 10 of those working in *Arts, Entertainment and Recreation*, the two sectors reporting the highest levels of furlough.⁴⁷

For many in Wales the Covid-19 pandemic has had a detrimental impact on their household incomes. Public Health Wales survey evidence suggests that the 20% of people are in a worse financial situation as a result of the coronavirus, while 16% report being better off. 16% felt their employment or work prospects were worse and 41% had worried about their finances in the previous week⁴⁸. Concerns have been raised that the coronavirus is having a detrimental impact on the finances of poorer households, particularly those whose members work in shutdown sectors. These households are less likely to be able to reduce their spending significantly as a result of coronavirus in the same way that richer households will be able to, meaning they are more likely to be financing their spending during restrictions using savings (which may be limited) and accumulating debt.⁴⁹ The impact of restrictions has not been felt equally, with lower paid workers more likely to have been furloughed or lost their job. Lower income households were also more likely to report increased anxiety around household finances.⁵⁰

Consumer confidence

In the event that the accommodation sector is permitted to reopen, it is difficult to determine the impact the crisis will have on demand going forward compared to the levels it saw before the crisis and last summer. Survey evidence suggests that while individuals in Wales are currently much more reluctant to travel abroad that prior to the crisis there is anecdotal evidence to suggest that the Prime Minister's announcement that international trips may be able to commence from 17 May in England prompted a surge in foreign holiday bookings.⁵¹ In 2020 30% of UK adults (24% of Wales residents) took an overnight holiday trip in the UK between July and September.⁵² In a recent survey 15% of UK adults, and the same proportion of Welsh residents intended to take an overnight trip in the UK this spring. 34% of UK adults, though only 30% of Welsh residents, intended to take a summer trip. Among spring and summer trip intenders, 9% said they were likely to visit Wales. Only 4% of UK adults said they had taken an overseas holiday since the start of the first lockdown.⁵³ For comparison, in series of surveys last summer, around 6 in 10 Welsh residents said they would usually take an overseas holiday in the summer and around half reported normally taking a UK holiday.⁵⁴ The pandemic has led to a significant drop in international visitors.

Recent survey data shows camping or caravan accommodation as consistently popular among those intending to take a UK trip, ranking 2nd in spring and 3rd summer, with rented self-catering ranking highest for both seasons. Whilst flexible

⁴⁷ Covering 5-18 April 2021

⁴⁸ Public Health Wales (2021) Public Engagement Survey on Health and Wellbeing during Coronavirus Measures: Week 48; 1st – 7th March 2021.

⁴⁹ Bangham & Leslie (2020) Rainy days: An audit of household wealth and the initial effects of the coronavirus crisis on saving and spending in Great Britain. Resolution Foundation.

⁵⁰ [Caught in a Covid Trap: 15 November 2020](#) Resolution Foundation

⁵¹ [Holiday bookings surge in UK after lockdown exit plans revealed](#), The Guardian, 23 February 2021

⁵² Visit Wales [Covid Consumer Tracker Wales Profile](#) 20 October 2020

⁵³ UK Consumer Tracker [Wave 29: 19-23 April](#)

⁵⁴ Public Health Wales (2020) Public Engagement Survey on Health and Wellbeing during Coronavirus Measures: Weeks 11, 14, 16; June-July 2020.

booking and cancellation is considered most important for accommodation choice, hygiene, cleanliness and distancing measures factor significantly. UK adults aged over 45 who have had at least one dose of a Covid-19 vaccine exhibit marginally higher overnight trip intent over the summer period compared to those who have not been vaccinated, implying potential for trip taking intentions to increase as more of the population receives a vaccination.⁵⁵

ENVIRONMENTAL IMPACTS

The accommodation sector is an area of the economy which requires employees and consumers to travel to particular premises to operate. Opening up the sector will almost certainly increase the reasons for members of the public to travel by private vehicle (especially so given restraints to effective public transport capacity) as people will typically travel long distances to access accommodation, making active travel unfeasible. While no forecasts are available as to what the knock on effect will be to air quality it can be expected to have a negative impact when compared to recent months, in which air quality is believed to have improved. For this reason, officials in Environment and Rural Affairs are monitoring the impacts on air quality that have arisen since lockdown measures were introduced. External consultants have been commissioned to analyse the impacts and this work will inform future policy with a view to retaining air quality improvements for the future, as far as possible.

IMPACT ASSESSMENTS

Equality impacts

An assessment of impacts by protected characteristics is set out below. Lockdown restrictions on this sector have had an unequal impacts across society with the young and females particularly affected.

⁵⁵ UK Consumer Tracker [Wave 29: 19-23 April](#)

<i>Protected characteristic or group</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate Impacts?</i>
<i>Age (think about different age groups)</i>	<p>Positive: Opening up the sector could have beneficial distributional consequences for the young should it aid in the preservation of jobs and increasing household incomes for those who work in the sector (i.e. by receiving their full salary as they are transferred off furlough).</p> <p>Negative: The risk of negative health outcomes associated with contracting Covid-19 increases with age, which should be considered for both staff and customers of the sector.</p>	Analysis by Welsh Government of Annual Population Survey (APS) data for 2018 shows that 29% of workers in tourism in Wales were under the age of 25.	<p>Mitigations that the sector have been asked to implement and limited reopening in first instance are aimed at reducing the risk of transmission for all groups; customers and staff.</p> <p>Risk assessments that businesses are asked to conduct should be used to identify disproportionate risks to certain groups.</p>
<i>Disability (think about different types of disability)</i>	No specific differential impacts identified.	Analysis of APS data for 2019 suggests that disabled people represent 11% of employees within the accommodation sector in Wales (this group represents 15% of the wider workforce).	N/A
<i>Gender Reassignment (the act of transitioning and Transgender people)</i>	No specific differential impacts identified.	N/A	N/A

<i>Protected characteristic or group</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate Impacts?</i>
<i>Pregnancy and maternity</i>	Positive: Allowing the use of shared service areas, such as toilets, will also include baby changing areas. This could expand the areas available to young families to change diapers and other considerations	N/A	N/A
<i>Race (include different ethnic minorities, Gypsies and Travellers and Migrants, Asylum seekers and Refugees)</i>	Neutral: BAME individuals make up a proportional share of employees in the accommodation sector as they do of the wider workforce. Negative: BAME groups may be disproportionately at risk of negative health outcomes should they contract Covid-19, which should be considered for both staff and customers of the sector.	Analysis of APS data for 2019 estimates that 5% of workers in accommodation in Wales are BAME (this group only represents 5% of the Welsh workforce).	Guidance and promoted mitigations are designed to reduce the risk of transmission for all groups, including customers and staff. Risk assessments that businesses are asked to conduct should be used to identify disproportionate risks to certain groups.
<i>Religion, belief and non-belief</i>	No specific differential impacts identified.	N/A	N/A
<i>Sex / Gender</i>	Positive: Opening up the sector could have beneficial distributional consequences for the women should it aid in the preservation of jobs and increasing household incomes for those who work in the sector (i.e. by receiving their full salary as they are transferred off furlough).	Analysis of APS data for 2019 estimates that 53% of workers in Wales within the accommodation sector are female, while women represent 47% of the total Welsh workforce.	No perceived negative impacts to mitigate.

<i>Protected characteristic or group</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate Impacts?</i>
<i>Sexual orientation (Lesbian, Gay and Bisexual)</i>	No specific differential impacts identified.	N/A	N/A
<i>Marriage and civil partnership</i>	No specific differential impacts identified.	N/A	N/A
<i>Children and young people up to the age of 18</i>	Negative: Adults employed the accommodation sector could have childcare responsibilities with the sector due to open before schools shut for the summer holidays (although an extension is available at Local Authorities discretion). Traditional forms of childcare may have been disrupted by current lockdown restrictions.	Welsh Government analysis suggests that 5,600 adults employed within the accommodation sector have children under the age of 16.	The Welsh Government has eased restrictions on childcare sector with a view to easing the pressures on families who may have adults who need to return to physical premises to work.
<i>Low-income households</i>	Positive: Opening up the sector could have beneficial distributional consequences for the low paid should it aid in the preservation of jobs and increasing household incomes for those who work in the sector (i.e. by receiving their full salary as they are transferred off furlough).	Provisional data from the Annual Survey of Hours and Earnings provides estimates for hourly and weekly gross pay by 2-digit SIC codes in Wales. For Accommodation (SIC code 55) median gross hourly pay was £8.82 - £3.37 lower than the Welsh median for all employee jobs of £12.19. For weekly gross pay in this sector the median is £280.30, approximately £160.50 lower than the Welsh median.	No perceived negative impacts to mitigate.

<i>Protected characteristic or group</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate Impacts?</i>
		Using the same data at least 75% of employees in Accommodation are estimated to have lower gross hourly pay than the Welsh median.	

Human Rights and UN Conventions

The overriding purpose of the restrictions and requirements associated with lockdown have been to protect everyone's right to life. This has led to constraints on rights such as on private and family life and the freedom of assembly and association on justifiable health grounds. Public health is described as an acceptable reason to curtail these rights, as long as it is necessary and proportionate. Notwithstanding the ongoing constraints from lockdown in the round, this proposal could affect the following:

<i>Human Rights</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate negative Impacts?</i>
<i>Article 11 of the International Covenant on Economic, Social and Cultural Rights (ICESCR) recognises the right of everyone to an adequate standard of living for himself and his family, including adequate food, clothing and housing, and to the continuous improvement of living conditions.</i>	Positive: allowing the accommodation sector to reopen will facilitate the return to work of many employees within the sector who currently could be earning below the National Living and Minimum Wages due to receiving 80% of their pre-crisis income.	Income data from Annual Survey of Hours and Earnings shows that workers in this sector earn significantly below the average (median) Welsh wage and many are likely to be earning less than the National Living/Minimum wage as a result of being furloughed.	No specific negative impacts from the proposal.

United Nations Convention on the Rights of the Child

The convention has been considered in this assessment. The principal benefit is a positive impact from going on holidays on **Article 31** (All children have a right to relax and play, and to join in a wide range of activities). Going on holiday as part of an extended household or with another household socially distanced could support rights under **Article 15** (Children have the right to meet together and to join groups and organisations, as long as this does not stop other people from enjoying their rights).

Opening up the sector should have a general positive impact linked to parental income:

- **Article 18** – Both parents share responsibility for bringing up their children, and should always consider what is best for each child. Governments should help parents by providing services to support them, especially if both parents work.
- **Article 27** – Children have a right to a standard of living that is good enough to meet their physical and mental needs. The Government should help families who cannot afford to provide this

In meeting obligations under **Article 12** (Children have the right to say what they think should happen, when adults are making decisions that affect them, and to have their opinions taken into account) we have considered the Coronavirus and Me survey of over 23,700 children and young people aged 3-18 in Wales. In relation to the right to relax and play, many children mentioned positives around having more time to play, highlighting the chance to forget about coronavirus and enjoying more freedom. The top two responses from young people (12-18) on which stay at home rules have impacted the most on how they feel are 'not being able to spend time with friends' (72%) and 'not being able to visit family members' (59%). These findings could be positively supported through a combination of recently introduced extended households and the reopening of accommodation facilitating holidays.

Welsh Language

The proposals to reopen accommodation are not known to have any positive or negative impacts on the Welsh Government's aim to increase the number of Welsh speakers, promote the use of the Welsh language, and creating favourable conditions for the Welsh language, as set out in **Cymraeg 2050: A million Welsh speakers**.

viii. Indoor Play Centres

WELLBEING IMPACTS

Experts emphasise that play should be seen as an essential activity for children. It is fundamental to children's well-being, resilience and development and it is mostly

how they exercise. Active play is one of the easiest and most natural ways that children of any age can engage in the necessary levels of physical activity and the most common type of physical activity that children take part in outside school.

When given the opportunity to play children are likely to be physically active by running, jumping, dancing, climbing, digging, lifting, pushing and pulling. Play can support physical literacy, with particularly young children developing physical abilities through play. This can include muscle development, coordination and spatial awareness. Play also contributes to emotional well-being, assessing risk, imagination and creativity, socialisation and resilience.

For many children, increased opportunities will be important in the aftermath of recent months, when restrictions meant they could not meet and interact with friends or family. Children will have picked up on tensions at home, or concerns about the virus, and will need opportunities to decompress and release those pressures.

Children will benefit from increased access to indoor play centres, particularly over the summer period. They are often a feature of wider tourist attractions which families attend on holidays, and dedicated *indoor play centres* provide a valuable resource for families on days when the weather is poor. Consequently there would be clear physical, developmental and wellbeing benefits for children and young people from increased opportunities to be in *indoor play centres*. This is particularly so for those without access to gardens or larger spaces to play.

ECONOMIC IMPACTS

Indoor play centres are businesses. BALPPA represent 180 play areas out of 1,100, and report that the sector employs over 30,000 people across the UK. This may underreport the size of the workforce as *indoor play centres* also operate as a part of a wider indoor or tourist attraction. There is no specific breakdown at a Wales level, but they report the majority of dedicated *indoor play centres* across Wales are SMEs, running as individual entities. They support local supply chains and contribute to the local and national economy.

Physical activity participation yields a generous return on investment in terms of the consequential benefits of a healthy and active lifestyle. Children play for the fun and sheer pleasure of it. However, there are significant individual and societal benefits to play. The benefits of play to children are improved mental and physical health, socialisation, emotional health, creativity and increased resilience. Play protects against the negative impacts of poverty and will support children to recover following the social restrictions that have been in place over the last few months.

ENVIRONMENTAL IMPACTS

The environmental impacts of allowing children to engage in indoor play is likely to be low. *Indoor play centres* tend to operate from dedicated buildings or space within larger facilities (for example, shopping centres). We might see a small increase in traffic as people drive to access facilities, particularly on days where poor weather does not support outdoor play.

Equality impacts

An assessment of impacts by protected characteristics is set out below. In general terms the proposal promotes equality as it removes restrictions on travel that will have affected different groups in different ways. Potential negative impacts relate to the risks of adaptations being made to public places not fully taking into account the needs of different groups. These are primarily about equality of access.

Protected characteristic or group	What are the positive or negative impacts of the proposal?	Reasons for your decision (including evidence)	How will you mitigate Impacts?
<i>Age (think about different age groups)</i>	Positive: Re-opening more premises providing a greater range of services and attractions will be of benefit to all age groups. However there are particular benefits to children from reopening indoor play centres. These are outlined above.	<p>There is a wealth of evidence on the value of play to child development, including physical development, literacy and emotional development.</p> <p>This includes reports published by the American Academy of Paediatrics⁵⁶ and the British Medical Association⁵⁷.</p>	<p>Welsh Government has adopted a collaborative approach to developing guidance on re-opening sectors/services/facilities with stakeholders and industry. Therefore, comprehensive guidance to support safe implementation of measures is available for those areas where restrictions have been eased and will be prepared as appropriate for other premises as preparations are made for them to re-open.</p> <p>Guidance in relation to indoor play centres is under development and will underline that it illegal to discriminate, directly or indirectly, against anyone because of a protected characteristic.</p>
<i>Disability (think about different types of disability)</i>	Positive: As more premises re-open, disabled people should benefit from being able to access	There are no figures available on the number of employees with disabilities within the indoor play sector.	Guidance for the indoor play sector will require organisations to consider the rights of those with protected

⁵⁶ <https://pediatrics.aappublications.org/content/119/1/182>

⁵⁷ <https://www.researchgate.net/publication/281283103> Preventing childhood obesity BMA June 2005

	<p>a greater range of services and other opportunities. This will help to reduce loneliness and isolation; provide more access to support; and generally promote wellbeing.</p> <p>Indoor play centres are required to comply with the Disability Discrimination Act 1995, ensuring people with disabilities can access their premises. Specific indoor play equipment for use by children with disabilities is available in some settings across Wales.</p>	<p>Nor is there any information on the number of visits to them undertaken by children or adults with disabilities. Consequently it is difficult to quantify specific impacts.</p> <p>Local authorities are under a statutory duty to ensure there are sufficient play opportunities in their area for children with disabilities.</p>	<p>characteristics in terms of accessing venues or services.</p> <p>Examples could include:</p> <ul style="list-style-type: none"> • Informing people of any changes to booking procedures or how the destination will assist people with disabilities so that they can continue to access the venue in a safe way. • providing additional information to visually impaired visitors in advance of visits regarding changed access to buildings or sites and new and more complex visitor routes and generally by making all visitor information accessible <p>The guidance also states that employers have statutory obligations towards disabled workers and must make reasonable adjustments to ensure that they are not put at a disadvantage.</p>
<p><i>Gender Reassignment (the act of transitioning and Transgender people)</i></p>	<p>Unlikely to have an impact.</p>	<p>Insufficient data available to form a proper assessment</p> <p>As more premises open, people should generally benefit from more opportunities for safe social interaction and opportunities to access services,</p>	<p>Guidance for the indoor play sector will advise that organisations consider the rights of those with protected characteristics and how they will be able to continue to access the venue / services safely.</p>

		which will help to reduce loneliness and isolation; provide more access to support; and generally promote wellbeing.	
<i>Pregnancy and maternity</i>	Positive: Re-opening more businesses such as indoor play centres will also provide a greater range of activities which mothers/carers may be able to take young children to enjoy	As more premises open, they will generally benefit from more opportunities for safe social interaction and opportunities to access services, which will help to reduce loneliness and isolation; provide more access to support; and generally promote wellbeing.	Guidance for the indoor play sector will advise that organisations consider the rights of those with protected characteristics and how they will be able to continue to access the venue / services safely.
<i>Race (include different ethnic minorities, Gypsies and Travellers and Migrants, Asylum seekers and Refugees)</i>	Neutral as visitors. Unclear in terms of employees as there is no detail available on the workforce. However, as more businesses are allowed to re-open they should help the preservation of jobs and increase household incomes for those who work in the sector (i.e. by receiving their full salary as they are transferred off furlough). Negative: BAME groups are disproportionately at risk of negative health outcomes should they contract Covid-19	Insufficient data available to form a proper assessment As more premises open, people should generally benefit from more opportunities for safe social interaction and opportunities to access services, which will help to reduce loneliness and isolation; provide more access to support; and generally promote wellbeing.	Consistent and clear messaging needs to be maintained reminding BAME people of the risks that COVID-19 poses. Guidance for the indoor play sector will advise that organisations consider the rights of those with protected characteristics and how they will be able to continue to access the venue / services safely. The guidance also advises the use of simple, clear and accessible messaging to explain guidelines, with consideration of groups whose first language may not be Welsh or English. It also requires that the risk assessment pays particular regard to whether the people

			doing the work are especially vulnerable to COVID19 and to put in place steps to protect them.
<i>Religion, belief and non-belief</i>	Unlikely to have an impact	<p>Insufficient data available to form a proper assessment</p> <p>As more premises open, people should generally benefit from more opportunities for safe social interaction and opportunities to access services, which will help to reduce loneliness and isolation; provide more access to support; and generally promote wellbeing.</p>	Guidance for the indoor play sector will advise that organisations consider the rights of those with protected characteristics and how they will be able to continue to access the venue / services safely.
<i>Sex / Gender</i>	<p>Neutral: Women tend to be primary care-givers, including for children during the school holidays. Access to more and in particular, community provided services such as indoor play centres will be of benefit</p>	<p>Insufficient data available to form a proper assessment</p> <p>As more premises open, people should generally benefit from more opportunities for safe social interaction and opportunities to access services, which will help to reduce loneliness and isolation; provide more access to support; and generally promote wellbeing.</p> <p>Opportunities to return to employment will help reduce anxieties associated with lockdown including financial worries.</p>	Guidance for the indoor play sector will advise that organisations consider the rights of those with protected characteristics and how they will be able to continue to access the venue / services safely.
<i>Sexual orientation</i>	Unlikely to have an impact.	Insufficient data available to form a proper assessment	Guidance for the indoor play sector will advise that organisations

<i>(Lesbian, Gay and Bisexual)</i>		As more premises open, people should generally benefit from more opportunities for safe social interaction and opportunities to access services, which will help to reduce loneliness and isolation; provide more access to support; and generally promote wellbeing.	consider the rights of those with protected characteristics and how they will be able to continue to access the venue / services safely.
<i>Marriage and civil partnership</i>	Unlikely to have an impact.	<p>Insufficient data available to form a proper assessment</p> <p>As more premises open, people should generally benefit from more opportunities for safe social interaction and opportunities to access services, which will help to reduce loneliness and isolation; provide more access to support; and generally promote wellbeing.</p>	Guidance for the indoor play sector will advise that organisations consider the rights of those with protected characteristics and how they will be able to continue to access the venue / services safely.
<i>Children and young people up to the age of 18</i>	<p>Positive: Will provide increased opportunities to engage in a range of different activities and provide opportunities for more social interaction.</p> <p>Positive: Exercise and sport is an important contributor to the healthy physical, psychological well-being and social development of children. Evidence suggests that</p>	<p>Children’s rights have been considered as part of this assessment (see above); and the measures providing opportunities to undertake more activity will be positive for children and supports compliance with UNCRC articles (Article 12, 14, 15, 27, 31)</p> <p>The survey ‘Coronavirus and Me’ of approx. 23,000 children and young people in Wales</p>	No mitigation required.

	<p>children are doing less exercise in Wales now than before the pandemic. Re-enabling activity in this area will widen the scope for children and young people to engage in physical exercise</p>	<p>provides some insight into their experiences of the coronavirus pandemic and their reactions, hopes and concerns for the future (Article 12, UNCRC).</p> <p>Sport Wales survey conducted by Savanta ComRes from 8-12 May 2020:</p> <p>“26% report that their children are doing more activity since the COVID-19 restrictions, while 35% report that their children are doing less. Overall this suggests a net reduction of 9 percentage points.”</p>	
<p>Low-income households</p>	<p>Positive: Indoor play centres are usually located in areas that are easily accessible to families by foot or public transport as well as by car, and often alongside other facilities aimed at children and families. While some of these centres charge entry fees, they are generally kept low, with family deals and other incentives to make them affordable. They represent an alternative to outdoor playgrounds and parks in poor weather and are</p>	<p>Sport Wales survey conducted by Savanta ComRes from 8-12 May 2020:</p> <p>“There are however significant variations within certain demographic groups. There is a net increase in activity levels amongst those from higher socioeconomic backgrounds (+7 percentage points), however there is a net decrease amongst those from lower socioeconomic backgrounds (-4 percentage points).”</p> <p>“Those children from lower socio economic</p>	<p>Guidance on reopening indoor play centres will advise making provision to allow bookings from people who do not have access to the Internet.</p>

	particularly important to people with no outdoor space.	backgrounds appear to be experiencing the greatest reductions (LOW SES: More 23% Less 36% = -13 percentage points HIGH SES: More 28% Less 35% = -7 percentage points)”	
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Human Rights Act

The overriding purpose of the restrictions in the round is the protection of the right to life and any changes must be considered in this context. The changes proposed make a contribution to the right to respect for private and family life, by removing restrictions that could interfere with a person’s private and family life.

United Nations Convention on the Rights of the Child

The convention has been considered in this assessment. The restrictions on indoor play centres could conflict principally with the following Article:

- **Article 31** – All children have a right to relax and play, and to join in a wide range of activities.

Easing related restrictions would enable the Welsh Government to meet its obligations under this article in particular. There may also be some benefits under Article 15 (the right to meet together), but these will be constrained until further easements are made to gatherings indoors.

Indoor attractions form part of the provision of experiences and facilities that will be family-orientated that will maximise the outcomes that can be delivered for children and young people.

Welsh Language

There is no specific data on the use of indoor play centres by Welsh speakers, or on the numbers of the workforce who speak Welsh. However, there are indoor play centres across Wales, with a number located in predominantly Welsh speaking areas.

Looking beyond dedicated indoor play centres, these services often form part of a wider tourism of family focussed attraction. There are 127,000 people directly employed in the visitor economy - around 9% of the workforce. The economy is integral to creating the social conditions where Welsh speakers can stay in Welsh-speaking communities, or return to those communities. Many predominantly Welsh-speaking areas are highly dependent on tourism for income and employment. A high percentage of tourism businesses are located in Welsh-speaking areas – for example over a third of tourism accommodation businesses are located in local

authority areas where more than 40% of the population speak Welsh as a first language

Welsh speaking communities will benefit from the continuing operation of tourism attractions which in turn will help create and safeguard employment, potentially encouraging Welsh speakers to stay and work there, and thus maintain the viability of the language.

Guidance on indoor play centres will advise that organisations consider how you will continue to comply with Welsh language duties when implementing any changes in their activities / service.

ix. Bowling alleys

WELLBEING IMPACTS

In October 2020 Sport Wales carried out a second survey into people's sport and physical activity habits. The results showed the following areas of note on the impact lockdowns are having on physical and mental wellbeing.

- There appears to be a growing recognition of the importance of exercising regularly, and more people are now exercising to manage their mental and physical health. The same percentage (62%) of people as in May – when the first survey was carried out – were exercising to support their mental health.
- People's exercise regimes are still being impacted but not as severely as they were during the national lockdown. People are now exercising more away from home.
- The survey showed that many people's activity levels had returned to pre-pandemic levels. However, women are more likely to say they are doing less activity than before the pandemic, whilst men appear to be doing more. 40% of women disagree with the statement that they have more time now to be physically active.
- Similar inequalities exist across socio-economic status, long-standing conditions and ill-health, and age. For example, 22% of people saying they are now doing a bit more exercise than they did before the pandemic are in the highest social grade, whilst 20% of those saying that they now do less physical activity than before the pandemic are in the lowest social grade.
- Between 20-25% of people said they had visited indoor gyms, swimming pools and sports halls. However, of those that did attend an indoor swimming or gym session in the week prior to the survey, 80% felt comfortable, showing that facilities are putting in place the measures required to make people feel safe.

ECONOMIC IMPACTS

As part of a Sport Wales commissioned economic evaluation report⁵⁸, Sheffield Hallam University's Sport Industry Research Centre (SIRC) estimated the impact of a period of lockdown and then modelled this over the course of a year. This involved periods of normality, full lockdown, tiered lockdown, and other periods where the economy was operating at a reduced capacity. To estimate the economic impact of sport in 2019, just prior to the outbreak when conditions were assumed to be 'normal', sport participation rates and spending patterns were calculated. The resulting estimation suggested that just prior to the pandemic, consumer spending continued to grow (by 7%) in volume as did GVA and jobs (each by 5%). This valued sport-related consumer spend in Wales at £1.26bn, sport related GVA at £1.195bn and estimated sport employment as 31,100 FTEs. This suggests that the growth trends found over the past 20 years looked set to continue in 2019 onwards.

All investments that resulted in growth in the recent past are now under jeopardy because of the COVID-19 pandemic. The result of this model suggests that a strict lockdown period can be shown to reduce consumer expenditure (-47%), GVA (-50%), and employment (-48%). This means that the economic impact of sport would be effectively halved during a strict lockdown condition.

When these lockdown conditions are coupled with recovery periods over the period of a year (in 2020), the net impact on consumer spending is far more severe for the sport sector in Wales when compared to UK consumer spending in general (-24% and -15% respectively). Consumer spending on sport in Wales has therefore reduced by an estimated £303.4m. Consumer spending on sport was reduced in some areas more than others; this is mainly due to the increase in informal sport activities such as running and cycling during lockdown, and associated online retail (e.g. admission fees decreasing by 40% vs. a 16% increase in spending on bikes).

In 2020 the UK economy is expected to have declined by 10%. At the same time sport related GVA in Wales fell by 20%, almost twice the decline in the UK. GVA in Wales is therefore estimated to have reduced by £209m. In Wales the GVA generated through spectator sports had seen the greatest reduction (-43%). Welsh Leisure and Culture Trusts continue to incur a net loss of £292,000 per month while their facilities are closed, making bankruptcies a real possibility.

It is important to note that these conditions would have been a lot worse without the initial £22.7 million investment on sport support packages, as well as other indirect packages such as the local authority hardship fund. It is estimated that without investment, sport-related GVA in Wales could have fallen by three times more than the UK economy. The voluntary sector in Wales, for example, would have seen an even greater decline without this contribution (-80% vs. -50%). In addition, 15.2 thousand FTE sport jobs would have been at risk of being lost without public support. With the end of the recovery package in March these concerns once again become live realities.

⁵⁸ Kokolakis *et al*: The economic consequences of the COVID-19 pandemic on sport in Wales, Sheffield Hallam University, January 2021

Sport is a significant economic industry for Wales. The network of micro-businesses that drive the sport economy are embedded in their communities. They add real value in terms of their ability to directly support employment as well as how they service affiliated industries. Prior to the pandemic there was a consistent growth in the influence of sport on the economic output in Wales. Whilst this has been dramatically hit, there are policy approaches which can sensibly, safely and sustainably return this economic boost to the sector. The easing of restrictions on gyms, leisure centres and fitness facilities (including community centres) would represent an important step in this regard.

ENVIRONMENTAL IMPACTS

As with most other easements, removing restrictions in this area will almost certainly increase the reasons for members of the public to travel.

IMPACT ASSESSMENTS

Equality impacts

An assessment of impacts by protected characteristics is set out below.

<i>Protected characteristic or group</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate Impacts?</i>
<i>Age (think about different age groups)</i>	Positive: Re-opening more premises providing a greater range of services and attractions will be of benefit to all age groups. Younger cohorts of the population are significantly more likely to work within the sport and leisure sector in Wales than older cohorts, therefore opening the sector could have positive distributional impacts if it prevents potential job losses and increases household incomes by transferring individuals off the UK's Job Retention Scheme. This cohort currently represents the age group most at risk from an economic downturn.	Analysis by Welsh Government of Annual Population Survey (APS) data for 2019 shows that 31% of workers in the sports activities sector in Wales are under the age of 25 (while this age group only represents 12% of workforce).	N/A

<p><i>Disability (think about different types of disability)</i></p>	<p>Positive.</p>	<p>Analysis of APS data for 2019 suggests that disabled people represent 15% of the workforce for the Sports Activities sector (this group represents 15% of the wider workforce).</p> <p>As more premises re-open, disabled people should benefit from being able to access a greater range of services and other opportunities. This will help to reduce loneliness and isolation; provide more access to support; and generally promote wellbeing.</p>	<p>The guidance provided to tourism and hospitality businesses notes that organisations should consider the rights of those with protected characteristics in terms of accessing venues or services. This is also included in the checklist for tourism businesses.</p> <p>e.g. to inform them of any changes to booking procedures or how the destination will assist people with disabilities so that they can continue to access the venue in a safe way.</p> <p>e.g. providing additional information to visually impaired visitors in advance of visits regarding changed access to buildings or sites and new and more complex visitor routes and generally by making all visitor information accessible</p> <p>The guidance also states that employers have statutory obligations towards disabled workers and must make reasonable adjustments to ensure that they are not put at a disadvantage.</p>
<p><i>Gender Reassignment (the act of</i></p>	<p>Unlikely to have an impact.</p>	<p>As more premises open, people should generally benefit from</p>	

<i>Protected characteristic or group</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate Impacts?</i>
<i>transitioning and Transgender people)</i>		more opportunities for safe social interaction and opportunities to access services, which will help to reduce loneliness and isolation; provide more access to support; and generally promote wellbeing.	
<i>Pregnancy and maternity</i>	Positive: Re-opening more businesses such as tourist attractions will provide a greater range of activities which mothers/carers may be able to take young children to enjoy.	As more premises open, they will generally benefit from more opportunities for safe social interaction and opportunities to access services, which will help to reduce loneliness and isolation; provide more access to support; and generally promote wellbeing.	The Guidance for tourism and hospitality business highlights that risk assessments are a legal requirement for pregnant women, no matter the size of the business and that employers have a statutory duty towards new or expectant mothers.
<i>Race (include different ethnic minorities, Gypsies and Travellers and Migrants, Asylum seekers and Refugees)</i>	No differential impact identified.	Analysis of APS data for 2019 estimates that 8% of the workforce within the Sports Activities sector are BAME, while this group represents 5% of the overall Welsh workforce.	

<i>Protected characteristic or group</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate Impacts?</i>
<i>Religion, belief and non-belief</i>	No differential impacts identified.		<p>The tourism and hospitality businesses guidance states that to treat employees fairly steps should be taken to understand, involve and take into account the particular circumstances of those with protected characteristics. This is also included in the associated checklist.</p> <p>It also states that the steps that will usually need to be taken include ensuring you do not have an unjustifiable negative impact on some groups compared to others, for example those with religious commitments.</p>
<i>Sex / Gender</i>	No differential impacts identified.	Analysis of APS data for 2019 estimates that 42% of workers in Wales within the Sports Activities sector are female, while women represent 47% of the total Welsh workforce.	The tourism guidance states that to treat employees fairly steps should be taken to understand, involve and take into account the particular circumstances of those with protected characteristics. This is also included in the associated checklist.

<i>Protected characteristic or group</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate Impacts?</i>
<i>Sexual orientation (Lesbian, Gay and Bisexual)</i>	No differential impacts identified.		The tourism guidance states that to treat employees fairly steps should be taken to understand, involve and take into account the particular circumstances of those with protected characteristics. This is also included in the associated checklist.
<i>Marriage and civil partnership</i>	No differential impact identified	As more premises open, couples should generally benefit from more opportunities for safe social interaction and opportunities to access services, which will should promote wellbeing.	The tourism guidance states that to treat employees fairly steps should be taken to understand, involve and take into account the particular circumstances of those with protected characteristics. This is also included in the associated checklist.
<i>Children and young people up to the age of 18</i>	Positive: Will provide increased opportunities to engage in a range of different activities and provide opportunities for more social interaction for young people.	The survey 'Coronavirus and Me' of approx. 23,000 children and young people in Wales provides some insight into their experiences of the coronavirus pandemic and their reactions, hopes and concerns for the future (Article 12, UNCRC).	No mitigation required.
<i>Low-income households</i>	Positive: Will provide increased opportunities for families to engage in a range of local activities.		Leisure facilities that are local will be more accessible to low income households who may be unable to travel far from their home.

Human Rights and UN Conventions

The overriding purpose of the restrictions and requirements associated with lockdown have been to protect everyone's right to life. This has led to constraints on rights such as on private and family life and the freedom of assembly and association on justifiable health grounds. Public health is described as an acceptable reason to curtail these rights, as long as it is necessary and proportionate. Notwithstanding the ongoing constraints from lockdown in the round, this proposal affects the following:

<i>Human Rights</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate negative Impacts?</i>
<i>The right to enjoy family relationships without interference from government (e.g. right to live with your family and to regular contact)</i>	Positive: Will provide increased opportunities for families to engage in a range of local activities.	As more premises open, families will generally benefit from more opportunities for safe social interaction and opportunities to access services, which will help to reduce loneliness and isolation; and generally promote wellbeing.	No mitigation required.

United Nations Convention on the Rights of the Child

The convention has been considered in this assessment. The restrictions on bowling alleys could conflict with the following Articles:

- **Article 15** – Children have the right to meet together and to join groups and organisations, as long as this does not stop other people from enjoying their rights.
- **Article 31** – All children have a right to relax and play, and to join in a wide range of activities.

Welsh Language

The proposals are not known to have any positive or negative impacts on the Welsh Government's aim to increase the number of Welsh speakers, promote the use of the Welsh language, or to create favourable conditions for the Welsh language, as set out in **Cymraeg 2050: A million Welsh speakers**.

- x. Wedding receptions

ECONOMIC IMPACTS

Economic significance of sector

According to ONS data, the whole of the *Food and Beverage Service* sector, forming part of the wider supply chain for weddings and similar events, contributed £1.3billion of gross value added (GVA) to the Welsh economy in 2018, equivalent to 2% total GVA for the same year. In 2019 using Business Register and Employment Survey (BRES) data, there were an estimated 85,500 people directly employed in the 'Hospitality - Pubs, Cafes and Restaurants' sector in Wales, 6.7% of total employment.⁵⁹

The wider hospitality sector is also fundamental to the foundation economy. Local companies within the wedding and events industry often use suppliers which source food and drink from local suppliers. There is a clear knock on impact of the closure of the hospitality sector on the food and drink supply sector – for example, 50% of milk that is supplied by farmers generally goes to the hospitality sector. Although there has been a 15% uplift in the domestic consumption this does not make up for the drop from hospitality. Welsh Government has had to step in to support farmers as a result.

Size of sector and its supply chain in Wales

The sector is made up of a wide mix of venues that include country house wedding venues, barn venues, stately homes, castles (some Cadw owned), hotels, registry offices, places of worship, attractions and museums, golf courses, events venues, sports venues, restaurants and pubs, city venues such as social clubs, outdoor venues and parks.

In consultation with the sector, our best estimate is that there are circa 600 registered businesses in Wales that hold a valid licence to host and conduct marriages. Beyond that the supply chain that supports the wedding sector is vast and includes Registrars, Venues, Catering, Cakes, Flowers, Photos & Videos, Retail, Stationery, Bands/ DJs, Cars/ Transport, Marquee, Props & rentals, Hair & Make-up, Travel & Tourism, Support Staff, Wedding Trade Shows, Media Platforms. It is anticipated that a minimum of 10 businesses supply and support each single wedding at a venue.

Weddings and other special personal events drive tourism through guests travelling to attend. 2019 saw 2.8 million day visits and 96,000 overnight trips in Wales made by those attending a special personal event (e.g. wedding, christening, graduation), resulting in a total spend by those visitors, including accommodation and all other costs, of £430m.⁶⁰

⁵⁹ Defined 2-digit SIC2007 code (56) Restaurants and mobile food service activities and 563 Beverage serving activities.

⁶⁰ [GB Day Visit Survey and GB Tourism Survey](#)

Key facts⁶¹:

Value of sector in Wales

Average total cost of Wedding spend in Wales:	£17,236	
Average spend on venues in Wales:		£5,283
Number of Weddings held in Wales in 2019:	13,197	
Number of licensed wedding venues in Wales:	578	

Number of WALES Weddings:

13,197 per year

Approx 10,420 weddings postponed in 2020

74% of wedding businesses report losses of between 76% and 100% of their turnover since the first lockdown.

Approx Wedding Industry Workers - WALES⁶²:

2,580 businesses

18,920 workers

11,825 people on-the-day + 7,095 in support functions including supply chain

Workforce

The workforces in hospitality and tourism tend to be disproportionately lower educated, younger, Black, Asian and Minority Ethnic workers, and command salaries significantly below the Welsh average (median) – many of these are groups that typically experience the worst persistent impacts on their health, earnings, and employment potential as a result of economic downturns.

Supply chain / value of hospitality to Welsh economy and wider tourism & hospitality supply chain:

In 2018 the whole of the food and beverage service sector was worth £1.3billion of gross value added (GVA) to the Welsh economy. This was equivalent to 2% and 1.2% respectively of all GVA for that same year. While internal UK market goods flow statistics are not available, Welsh retailers will in many instances be buying produce and manufactured goods directly from Welsh firms, so there are likely to be supply chain benefits to increased levels of economic activity being permitted in the sector – however quantifying that impact is not possible.

ENVIRONMENTAL IMPACTS

No significant environmental impacts have been identified as a result of restrictions in this area, and none are anticipated as a result of the proposed easement.

⁶¹ UK Weddings Taskforce Survey of over 3000 wedding businesses Dec 24th 2020 – 12th Jan 2021

⁶² Industry intelligence

IMPACT ASSESSMENTS

Equality impacts

An assessment of impacts by protected characteristics is set out below. In general terms the proposal promotes equality as it removes restrictions on celebrating life events that will have affected different groups in different ways. Potential negative impacts relate to the risks of adaptations being made to regulated spaces not fully taking into account the needs of different groups. These are primarily about equality of access.

<i>Protected characteristic or group</i>	<i>What are the positive or negative impacts of the proposal?</i>	<i>Reasons for your decision (including evidence)</i>	<i>How will you mitigate Impacts?</i>
<i>Age (think about different age groups)</i>	<p>Positive: Younger cohorts of the population are significantly more likely to work within this sector in Wales than older cohorts, therefore opening sector could have positive distributional impacts if it prevents potential job losses and increases household incomes by transferring individuals off the UK's Job Retention Scheme. This cohort currently represents the age group most at risk from an economic downturn.</p> <p>Negative: The risk of negative health outcomes associated with contracting Covid-19 increases with age, which should be considered for both staff and customers of the sector.</p>	Analysis by Welsh Government of Annual Population Survey (APS) data for 2019 shows that 46% of workers in pubs, cafes, and restaurants in Wales are under the age of 25 (while this age group only represents 12% of workforce).	<p>Mitigations that the sector have been asked to implement and limited reopening in first instance are aimed at reducing the risk of transmission for all groups; customers and staff.</p> <p>Risk assessments that businesses need to conduct should be used to identify disproportionate risks to certain groups.</p>
<i>Disability (think about</i>	Positive: Disabled population in Wales represent a slightly	Analysis of APS data for 2019 suggests that a slightly higher	Welsh Government are aware of potential issues and are

<i>different types of disability)</i>	higher share of employees within the wider Tourism & Hospitality industries than they do in the workforce as a whole, therefore opening sector could have positive distributional impacts if it prevents potential job losses and increases household incomes by transferring individuals off the UK's Job Retention Scheme.	proportion of disabled people work in food and beverage services in Wales, with 17% of the workforce being classified as disabled (this group represents 15% of the wider workforce).	engaging with appropriate groups in preparation of completing an Integrated Impact Assessment. Risk assessments that businesses need to conduct should be used to identify disproportionate impacts on certain groups.
<i>Gender Reassignment (the act of transitioning and Transgender people)</i>	<i>No specific differential impacts identified</i>	N/A	N/A
<i>Pregnancy and maternity</i>	Negative: Planned reopening of the sector may result in regulated settings being used to increase effective outdoor capacity. It will be important to ensure that this does not create hazardous environments for parents with young children or pushchairs.	N/A	Welsh Government are aware of potential issues and are engaging with appropriate groups in preparation of completing an Integrated Impact Assessment.
<i>Race (include different ethnic minorities, Gypsies and Travellers and Migrants, Asylum seekers and Refugees)</i>	Positive: BAME population more likely to work within Tourism & Hospitality in Wales than white population, therefore opening sector could have positive distributional impacts if it prevents potential job losses and increases household	Analysis of APS data for 2019 estimates that 11% of workers in food and beverage services in Wales are BAME (while this group only represents 5% of the Welsh workforce).	Mitigations that the sector have been asked to implement and limited reopening in first instance are aimed at reducing the risk of transmission for all groups; customers and staff. Risk assessments that businesses will

	<p>incomes by transferring individuals off the UK's Job Retention Scheme.</p> <p>Negative: BAME groups may be disproportionately at risk of negative health outcomes should they contract Covid-19, which should be considered for both staff and customers of the sector.</p>		<p>need to conduct should be used to identify disproportionate risks to certain groups</p>
<i>Religion, belief and non-belief</i>	<p>Reopening Places of Worship Task and Finish group and the Ceremonies Group have met regularly and advised on the guidance for life event ceremonies such as funerals, baptisms and bar mitzvahs.</p>	<p>Allowing a celebration/reception after a life event ceremony will allow the family and individuals (albeit in a limited way) to have the event they had planned.</p>	<p>No specific negative impacts from the proposal.</p>
<i>Sex / Gender</i>	<p>Positive: proportion of sector employees who are women slightly higher than for Welsh workforce as a whole.</p>	<p>Analysis of APS data for 2019 estimates that 53% of workers in Wales within food and beverage services are female, while women represent 47% of the total Welsh workforce.</p>	<p>No specific negative impacts from the proposal.</p>
<i>Sexual orientation (Lesbian, Gay and Bisexual)</i>	<p>No specific differential impact identified.</p>	<p>N/A</p>	<p>N/A</p>
<i>Marriage and civil partnership</i>	<p>Reopening Places of Worship Task and Finish group has met regularly and advised on the guidance for the solemnisation of marriages and formation of civil partnership. The Hospitality sector</p>	<p>Allowing a celebration/reception after a marriage or civil partnership will allow couples to have the wedding day (albeit in a limited way) they had planned.</p>	<p>The Human Right is to get married, however, by allowing receptions in some instances and not others could be perceived as treating religious & civil ceremonies differently.</p>

	<p>which includes the Wales Weddings Venues stakeholder group have also met regularly and have contributed with data and analysis on size and impact on the sector.</p>		
<p><i>Children and young people up to the age of 18</i></p>	<p>Negative: Adults employed within venues, pubs, cafes, and restaurants could have childcare responsibilities with the sector. Traditional forms of childcare may have been disrupted by current lockdown restrictions.</p>	<p>Welsh Government analysis of 2018 Annual Population Survey data suggests that 11,400 adults employed within the pubs and restaurants sector have children under the age of 16.</p>	<p>The Welsh Government has eased restrictions on childcare sector with a view to easing the pressures on families who may have adults who need to return to physical premises to work.</p>
<p><i>Low-income households</i></p>	<p>Positive: Allowing members of this sector to return to work has the capacity to mitigate job losses</p>	<p>Provisional data from the Annual Survey of Hours and Earnings provides estimates for hourly and weekly gross pay by 2-digit SIC codes in Wales. For Food and Beverage Service Activities (SIC code 56) median gross hourly pay was £8.28 - £3.91 lower than the Welsh median for all employee jobs of £12.19. For weekly gross pay in this sector the median is £197.30, approximately £243.50 lower than the Welsh median.</p> <p>Using the same data at least 80% of employees in Food and Beverage Service Activities are estimated to have lower gross hourly pay than the Welsh median.</p>	<p>No specific negative impacts from proposal.</p>

Human Rights and UN Conventions

The overriding purpose of the restrictions and requirements associated with lockdown have been to protect everyone's right to life. This has led to constraints on rights such as on private and family life and the freedom of assembly and association on justifiable health grounds. Public health is described as an acceptable reason to curtail these rights, as long as it is necessary and proportionate. Notwithstanding the ongoing constraints from lockdown in the round, this proposal in affects the following:

Human Rights	What are the positive or negative impacts of the proposal?	Reasons for your decision (including evidence)	How will you mitigate negative impacts?
The right to enjoy family relationships without interference from government (e.g. right to live with your family and to regular contact)	Positive: allowing Venues, Pubs, Cafes, and Restaurants to reopen will facilitate the return to work of many employees within the sector who currently could be earning below the National Living and Minimum Wages due to receiving 80% of their pre-crisis income.	Income data from Annual Survey of Hours and Earnings shows that workers in this sector earn significantly below the average (median) Welsh wage and many are likely to be earning less than the National Living/Minimum wage as a result of being furloughed.	No specific negative impacts from the proposal.
Article 12 protects the right of men and women of marriageable age to marry and to start a family.	Although couples have been able to marry or form a civil partnership in all venues that are approved to hold a ceremony many have chosen not to proceed until they are able to celebrate the event with friends and family.	Allowing receptions/celebrations will allow couples to have the day they had planned albeit with continuing restrictions	No specific negative impacts identified.

United Nations Convention on the Rights of the Child

The opening of outdoor wedding receptions supports the requirement that all children and young people have a right to relax, play and to join in a wide range of activities. Weddings form part of the provision of experiences and facilities that will be family-orientated that will maximise the outcomes that can be delivered for children and young people.

Welsh Language

There are 150,000 people directly employed in the visitor economy - around 12% of the workforce. The economy is integral to creating the social conditions where Welsh speakers can stay in Welsh-speaking communities, or return to those communities. Many predominantly Welsh-speaking areas are highly dependent on tourism and hospitality for income and employment. A high percentage of tourism and hospitality businesses are located in Welsh-speaking areas – for example over a third of tourism accommodation businesses are located in local authority areas where more than 40% of the population speak Welsh as a first language.

Welsh speaking communities will benefit from the continuing operation of hospitality businesses which in turn will help create and safeguard employment, potentially encouraging Welsh speakers to stay and work there, and thus maintain the viability of the language.