

APPENDIX B
Agenda Item No. 5

TOURISM AND ITS CONTRIBUTION TO THE ECONOMY

Chief Executive

(1.) Purpose

This report provides Members with further benchmark information on the tourism economy of Aylesbury Vale with particular emphasis on the accommodation and conference sectors of this market. The report also summarises the significant issues highlighted by witnesses at the meeting of this committee on September 8th and provides a brief introduction to the witnesses and the issues they will be covering for this evenings meeting.

(2.) For decision

Following consideration of this report, and presentations from witnesses, Members are invited to identify the possible means by which this Council might support the development of accommodation and conference facilities throughout the Vale and identify the areas they would like further explored as part of Stage 3 of this review.

(3.) Supporting Information

3.1 Tourism In Aylesbury Vale Background Information

The Southern Tourist Board undertook a comprehensive economic impact study for this Council in 1998.

This study identified that Tourism was worth an estimated £86 million to the economy of Aylesbury Vale, the survey identified the following:-

- 318,000 overnight trips are made to the district per annum
- 1,113,000 bed nights were occupied.
- 2.6 million non local day trips are made to this area
- Visitor spend equates to 1,695 full time equivalent jobs.

3.2 Hotel & Accommodation

Over the period between 1997 and 1999 a series of occupancy studies highlighted that the accommodation providers within Aylesbury Vale were significantly out performing both regional and national trends. A hotel demand appraisal for Aylesbury Vale, undertaken in September 1998, showed that the hotels in Aylesbury Vale were achieving a 75% room occupancy compared to regional and national average occupancy figures of just 62% and that an estimated 3000 bed nights were being turned away from local hotels each month.

A Hotel Sector Shortage Study conducted by the Southern Tourist Board in 2001 further emphasised the strength of the local hotel sector. Buckinghamshire hotels had an average occupancy level of 67.9% compared to the regional average of just 63%

This study also highlighted the significant difference between weekday (Monday/Thursday) occupancy levels and those achieved at weekends. Weekday occupancy rates for the county were as high as 79.3% whilst weekend rates fell to 51.4%, reflecting the very strong nature of the business market for this area. This study also highlighted the lack of seasonality of demand for Buckinghamshire Hotels, as this was the only county within the region for which occupancy levels did not drop below 50% at any time during the year.

Over the past three years, there has been a significant development of hotel accommodation provision throughout Aylesbury Vale and in other areas of the county, particularly in Milton Keynes. A new 50 bedroom Travel Lodge has been provided at the Stoke Mandeville Stadium, the Holiday Inn on Aston Clinton Road has provided a further 84 rooms whilst there have been significant developments at the Beales and Villiers hotels in Buckingham. Construction is currently underway on a budget hotel development in Buckingham providing an additional 40 rooms, whilst planning permission was approved in 2003 for a further budget hotel development in the town providing up to 41 rooms.

Planning permission for a luxury 5* hotel development providing a proposed 120 rooms at Mentmore Towers is the subject of a legal challenge following our decision to grant planning permission. It is also proposed that a hotel facility will form an integral part of the Waterside development.

Comparisons between the Buckinghamshire occupancy figures over the last two years shows that despite this significant growth in provision the hotel occupancy levels for the county remain above the regional average, although by a reduced margin.

Year	Buckinghamshire	Southern Region
2002	61%	59%
2003	61%	60%

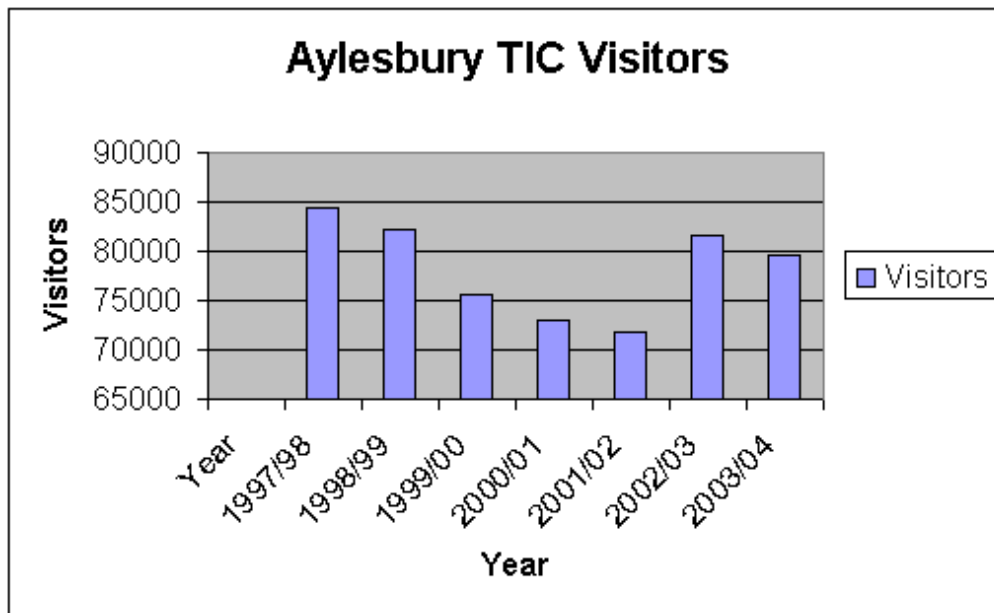
Other sectors of the accommodation market are currently facing a range of different issues. The recent increase in house prices within Aylesbury Vale has been sited as the reason for the recent loss of a number of guest house establishments, whilst the same issue has been a contributory factor in the recent growth of the self catering and short term let sector which now accounts for 6% of the UK holiday market. A recent Mintel report identifies that the camping and caravanning market is worth an estimated £2 billion to the national economy, yet Aylesbury Vale does not possess a single permanent site, despite the availability of many countryside and outdoor attractions, which are traditionally linked to such establishments.

In summary, there continues to be unmet demand for accommodation throughout Aylesbury Vale with particular shortfalls identified within the hotel accommodation of a 3* or higher standard in the Aylesbury Town Centre area, quality rural guest house and self catering accommodation throughout the district as well as a permanent campsite facility to serve the Vale.

3.3 Visitors to Aylesbury Vale

Tourist Information Centres

The Aylesbury Tourist Information Centre has been open since 1994, serving visitors to the Vale. Over the past decade the centre has consistently welcomed over 70,000 visitors per annum, the first 6 months of this year have shown a clear increase in visitor levels with 55,460 customers using the facilities at the centre.



In addition, the Buckingham and Wendover Tourist Information Centres welcome an annual 30,000 visitors per year apiece.

Source of Visitors

Records from the Aylesbury Tourist Information Centre show that approximately 97% of their customers are domestic visitors and of these around 50% are from the local vicinity. A summary of the source of enquiries for Aylesbury Vale & Buckinghamshire visitor information undertaken in 2001, confirmed this position, showing that the most likely sources of visitors, in relation to population figures, were the following counties and areas:-

- Buckinghamshire
- Hertfordshire
- Essex
- Berkshire
- North London
- Surrey
- Oxfordshire
- Leicestershire

3.4 Key Attractions

In terms of visitor numbers the most significant attractions within Aylesbury Vale is the Silverstone Motor Racing Circuit, which attracts over one million visitors per year for its annual programme running from February-November. The Aqua Vale Centre in Aylesbury, is the second most significant attraction welcoming in excess of 460,000 visitors last year, whilst the countryside attractions of Stockgrove Country Park and Wendover Woods both receive in excess of 200,000 visitors per year.

Attraction	Visits 2000	Visits 2001	Visits 2002	Visits 2003
Boarstall Duck Decoy, Boarstall	1,416	0	1,349	NA
Buckinghamshire Railway Centre, Quainton	35,000	39,162	43,000	39,000
Claydon House, Middle Claydon	31,105	28,369	28,751	27,059
Ford End Watermill, Ivinghoe	2,810	1,950	2,523	2416
Long Crendon Courthouse, Long Crendon	NA	NA	350	NA
Old Gaol Museum, Buckingham	NA	NA	4,350	4,185
Pitstone Green Farm Museum, Pitstone	NA	NA	2,000	2,000
Stowe Landscape Gardens, Buckingham	50,839	35,000	69,000	91,500
Waddesdon Manor, Waddesdon	165,000	179,887	217,157	251,000
Buckinghamshire County Museum, Aylesbury	NA	NA	130,694	142,479

The table above shows that two of the most significant traditional visitor attractions in Aylesbury Vale are the National Trust Properties at Waddesdon and Stowe. Both of which have significantly increased their visitor numbers over the past three years. The third major attraction, the Buckinghamshire County Museum has also seen a significant increase in visitors over the past 12 months.

3.5 Conference Facilities in Aylesbury Vale

There is not currently a comprehensive listing of conference facilities within Aylesbury Vale. Many of the larger conference or meeting venues, such as Waddesdon Manor, the Holiday Inn Hotel in Aylesbury and Horwood House independently undertake their own promotion; however, there is little co-ordinated awareness of the smaller or more specialist conference facilities throughout the Vale. A conference facilities section is currently being developed for the www.visitbuckinghamshire.org website. Aylesbury Vale District Council, in partnership with the Tourist Information Centres across the Vale are currently undertaking an audit of the conference & meeting facilities available with a view to producing a more customer friendly and up to date information service.

4.0 Witness Presentations September 8th 2004

4.1 Paul Jeffries, Tourism South East

Paul highlighted the research undertaken by Tourism South East into the current position of the accommodation sector across the region. This included the Hotel Sector Study referred to earlier in this report as well as sector studies considering the role of development opportunities for Bed & Breakfast, Camping & Self Catering and Pub Accommodation. Paul highlighted the need for Local Authorities to ensure that departments responsible for the regulatory functions such as Planning, Environmental Health and Business Rates associated with these businesses are aware of these information sources. He also emphasised the importance of Local Authorities in facilitating opportunities for local businesses to network and share best practice. The findings from the Hotel Sector Study for the region should also be made available to

Crest Nicholson, the Waterside Developers, to support the marketing of the hotel development to potential operators.

4.2 Debbie Rouget, Tourism Better Business Scheme

The Tourism Better Business Scheme, is a European Union funded training initiative providing free or subsidised training opportunities for all tourism related businesses across Buckinghamshire, Oxfordshire & Berkshire. Debbie highlighted that in an area such as Aylesbury Vale, with low unemployment figures, the training and retention of staff in the service sector was of key importance in the successful development of these businesses. She also highlighted how local tourism businesses could be encouraged to use local resources supporting the local economy as a whole. AVDC could be of assistance in promoting the services of the Better Business Scheme through our existing networks and directly to the tourism industry within their area. We could be of further assistance in providing venues, or co-ordinating local network events within their area. An example of such work is the forthcoming “Bucks Big Breakfast” event being organised at Claydon House on November 24th. This event, which is being co-ordinated by the Bucks Tourism Officers Group, is looking at ways in which small accommodation providers can support local food suppliers. The event is also being used to provide information and advice on the use of IT resources, improving quality standards, and the implications of the new licensing regulations for these businesses.

4.3 Nick Phillips, National Trust

Nick is the Aylesbury Vale Area Manager for the National Trust, responsible for eight trust facilities including Stowe Landscape Gardens, Claydon House and the Kings Head Centre, and for supporting the work of the team at Waddesdon Manor. He praised the work of Aylesbury Vale District Council in working in partnership with the National Trust in promoting its properties. This support involved the Tourist Information Network, production of visitor guides and marketing activities and organisation of special events such as the Roald Dahl Festival in Aylesbury.

Many of the Trust properties were used as conference venues and Nick believes AVDC could contribute most significantly in promoting these facilities to potential customers including the local business community. He also welcomed the potential relocation of the Aylesbury Vale Tourist Information Centre to the Kings Head Centre as a way in which the Kings Head could be considerably enhanced and developed as a visitor and conference centre, whilst also raising the profile of the Visitor Information Services.

5.0 Witnesses November 11th 2004

5.1 Ronnie Clark, General Manager, Holiday Inn Aylesbury

The Holiday Inn is the largest hotel and conference facility in Aylesbury Vale. Ronnie will provide an insight into the nature of the hotels business and ways in which AVDC currently support this. He will also highlight the type of information and support, which would be of value in developing this business.

5.2 Angie Leach, Lets Unlimited

Lets Unlimited directly manage ten holiday cottages from their Ivinghoe base, and provide agency support for over 60 properties within a 20 mile radius. Their own properties enjoy 100% occupancy, whilst the occupancy rates for the other properties within the portfolio is in excess of 80%. Angie Leach company founder and Director will provide an insight into this often forgotten market sector, highlight the value of this business for both visitors and people wishing to relocate to this area and explore the ways in which AVDC can be of assistance in the development of this business sector.

5.3 John Byrne, Head of Planning, AVDC

The planning function is one of the significant regulatory functions this Council perform in supporting the accommodation sector. John will provide a summary of this council's current policies and consider how the various services can work more closely to provide advice and support to potential applicants.

5.4 Blair MacGillivray, Stoke Mandeville Stadium

Following the recent redevelopment of the Stoke Mandeville Stadium, including the improvements to the accommodation and meeting facilities, there is much scope for the promotion of these facilities as a unique conference venue. Blair MacGillivray from Leisure Connection, who manage these facilities, will consider how this potential can be developed in partnership with Aylesbury Vale District Council.

6.0 Potential Action Points for the Stage 3 Review

This scrutiny review has already highlighted a number of potential action points which could be included within the stage three report. Although a number of additional issues are likely to be raised by the witnesses at this evening's meeting, it is useful to briefly summarise a number of the key action points already highlighted for Members further consideration. This action plan will be further refined, highlighting any resource implications within the stage three report.

- A programme of regular visitor research is re-established. This programme will help further identify the source of visitors to the Vale, the nature of their visit and their perceptions of services and facilities.
- Aylesbury Vale District Council to co-ordinate regular opportunities for the accommodation providers and attractions across the Vale to meet, share best practice and consumer information and enjoy training opportunities.

- Further utilise the contacts AVDC currently enjoy through our regulatory functions such as Environmental Health, Planning and Business Rates, to provide ongoing advice and promote training and development opportunities for tourism and service businesses.
- A comprehensive list of conference services be produced and promoted via the Tourist Information Centres, AVDC and Visit Buckinghamshire Websites for 2005.
- The relocation of the Aylesbury Tourist Information Centre to the Kings Head Centre is progressed for completion by March 2005.
- Aylesbury Vale District Council to maintain a pro-active role in organising and supporting community events such as the Roald Dahl Festival which promote the key visitor attractions across the Vale.
- Ensure dialogue is initiated between Crest Nicholson and Tourism South East to help target potential hotel developers as part of the Waterside Development.
- Support local hotels, attractions and transport providers in the production and promotion of themed weekend break packages, capitalising on the readily available weekend hotel accommodation.
- Ensure that the residents of Aylesbury Vale are aware of the visitor attractions and key events on their doorstep through features and promotions in the District Link and Vibe magazines and via the AVDC website.

Contact Officer: Ian Barham 01296 585184
 Background Documents: Economy Scrutiny Committee September 2004
 Southern Tourist Board Hotel Sector Study 2001
 Buckinghamshire Tourism Officers Action Plan 2001
 Aylesbury Vale District Council, Local Cultural Strategy 2002
 Tourism South East – Bed & Breakfast Sector Study 2004

Tourism Scrutiny Committee – greens may 2003
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