Buckinghamshire Council

Growth, Infrastructure & Housing Select Committee

Minutes

MINUTES OF THE MEETING OF THE GROWTH, INFRASTRUCTURE & HOUSING SELECT COMMITTEE HELD ON THURSDAY 7 SEPTEMBER 2023 IN THE OCULUS, BUCKINGHAMSHIRE COUNCIL, GATEHOUSE ROAD, AYLESBURY HP19 8FF, COMMENCING AT 2.00 PM AND CONCLUDING AT 4.14 PM

MEMBERS PRESENT

D Carroll (Chairman), T Hogg, A Baughan, S Chapple, I Darby, T Hunter-Watts, C Poll, D Town, S Wilson, P Brazier, P Cooper and L Smith BEM

OTHERS IN ATTENDANCE

R Stuchbury, C Harriss, R Matthews, P Strachan and M Winn, L Michelson, J Bromilow, D Eggleton, J Cheston, M Broadbent, S Ali, L Dowson, S Payne and R Dickinson

Agenda Item

1 APOLOGIES FOR ABSENCE/CHANGES IN MEMBERSHIP

Apologies had been received from Councillors Simon Rouse, Neil Marshall, Nic Brown, Carl Etholen and Qaser Chaudhry

Councillor Peter Brazier was present as substitute for Councillor Simon Rouse.

2 DECLARATIONS OF INTEREST

There were no declarations of interest.

3 MINUTES OF THE PREVIOUS MEETING

The minutes of the meeting held on 6th July 2023 were confirmed as a correct record.

4 PUBLIC QUESTIONS

There were no public questions.

5 VISITOR ECONOMY STRATEGY UPDATE

The Chairman welcomed Cllr Rachael Matthews, Deputy Cabinet Member for Town Centre Regeneration, Cllr Clive Harriss, Cabinet Member for Culture & Leisure, Cllr Peter Strachan, Cabinet Member for Planning and Regeneration, Sophie Payne, Service Director, Culture, Sport & Leisure, Shabnam Ali, Head of Economic Growth, Matthew Broadbent, Senior Economic Development Officer, and Lucy Dowson, Tourism Development Manager for Visit Buckinghamshire, to the meeting.

The following points were highlighted from the presentation.

- The Visitor Economy produced large economic benefits for the county and would be supported further through the Visitor Economy Strategy. The final strategy would be ready by November 2023.
- Bucks domestic tourism had grown less than comparable counties (Cambridgeshire, Oxfordshire and Hertfordshire) over the last decade. The County was mid-table in performance rankings for the Visitor Economy, sitting at 33rd nationally for tourism day visits.
- There were 7,772 visitor rooms in the county, 71% of these were in serviced operations, 19% non-service and 10% provided by campsites. There were 200 attractions in Bucks, with a 'traditional' asset base comprising historic properties and museums. These Hotels and attractions were generally clustered around the south of the county.
- Visitors for the Ridgeway and Waddesdon were compared. It was noted that Waddesdon tended to attract visitors that were relatively local, with Bucks and surrounding counties. The Ridgeway drew visitors from much further away, and across the country, reflecting its status as a National Trail.
- The consultation highlighted the residents and businesses perceptions of the visitor economy and tourism. Residents felt particularly positive about the benefits to the environment and local businesses, but they were concerned about the impact of litter. The response from businesses showed that 63% were smaller organisations with less than 10 employees, with 20% as registered charities.
- Three key themes for Buckinghamshire's visitor economy had been identified, these were Countryside, Walking & Cycling. Culture, Festival, Events & Film Industry. Local Food & Drink. Further large events held in Buckinghamshire would help improve the perception of the County as a place to visit.
- Current economic & financial pressures were negatively affecting the Visitor Economy. It was noted the Visitor Economy Strategy would not be revenue intensive for the Council.

During discussion, comments and questions raised by the Committee included.

- In response to a question regarding comparative local authorities, it was noted that Hertfordshire was particularly advanced in its approach to the Visitor Economy. They had chosen to outsource their Destination Management organisation as part of their strategy.
- Buckinghamshire was ideally located near to London with accessible train links. This represented an opportunity for Bucks and related to the key themes from the strategy - walk, cycle, take time out and relax. There was an opportunity for expansion of glamping sites, which were especially popular among younger generations.
- Cycle tracks were available from train stations to encourage visitors to access attractions. A particular challenge, compared to Oxford, was that attractions in Bucks tended to be spread across the county.
- Advertising in airports and train stations in London were typically not feasible due to expensive fees. However, flyers were distributed to key destinations and hotels in London to encourage tourists to visit bucks. Various options had been explored to ensure the best value for money.
- It was noted that Buckinghamshire was not necessarily associated with its notable tourist attractions. For example, Silverstone and Pinewood, while located in Buckinghamshire were not typically attributed to it. There was an opportunity to build on this as part of the Strategy.
- Data would be available on number of cyclists coming to the county for formal events, but not readily available for smaller clubs that go out informally. Cyclists positively contributed to the visitor economy and were likely to have visited coffee shops and food premises within the county.

- Online resources were typically used to research accommodation and attractions within Bucks. These were also cheaper for a businesses to develop than leaflets and advertisements at physical locations.
- The consultation was shared widely with Community Boards where it would've been further circulated to community and residents groups.

VISITOR ECONOMY PRESENTATION

VISITOR TYPES INFORMATION

6 LOCAL PLAN FOR BUCKINGHAMSHIRE UPDATE

The Committee received an update from Councillor Peter Strachan, Cabinet Member for Planning and Regeneration, Darran Eggleton, Head of Planning Policy and Compliance and John Cheston, Planning Policy Manager.

The following points were highlighted from the report.

- There was a requirement that the Local Plan for Bucks (LP4B) be adopted by April 2025, however the council estimates that this will be adopted by the second quarter of 2027. This was due to the regularly changing national picture for planning, with the introduction of new legislation delayed, as well as the complexities around a county-wide local plan.
- LP4B was proceeding on schedule and within budget. The call for Brownfield sites remains open to maximise the possibility of developing brownfield sites over greenfield.

During discussion, comments and questions raised by the Committee included.

- It was clarified that the Site Assessment referenced in 2.4D would establish availability of land for housing, economic development, and other uses. This feeds into the Housing and Economic Land availability Assessment (HELAA). The Housing and Economic development needs assessment looked at the need for housing over the plan period, as well as commercial development.
- The Employment and Retail land review was undertaken by consultants Lichfield. Furthermore, the Local Housing needs assessment would give a picture of housing and economic development over the Plan period.
- Members were advised the Green Belt doesn't necessarily need to be released for development. 68% of Buckinghamshire was not in the green belt, there could potentially be the scope to meet housing needs in the area without encroaching into the Green Belt. It was indicated Secretary of State, Michael Gove could introduce changes to the NPPF which would remove the requirement for planning authorities to use Green Belt to meet housing needs.
- There were no statutory sanctions in place should a local authority not have a Local Plan within 5 years of their vesting date. The Chief Executive of the Council has written to the Levelling up department for clarification but had not yet received a response. The LPB4 was being developed on schedule as set out in the report.
- An approved Local Plan would be the best defence against planning appeals in the Green Belt. The Area of Outstanding Natural Beauty (AONB) in the south of the county also offered some protection from unplanned and inappropriate development.
- Data Centres and Solar Farms are new areas of Planning Policy. In development of LP4B, the Council would look to include Policies to regulate their development. Policies in LP4B would encourage the use of renewable energy and sustainable development methods. The Planning team would be working alongside climate colleagues to ensure planning policies developed would go as far as they reasonably can to encourage adaption to climate change.
- SANGS are used to help protect the Chilterns Beechwoods area. A Mitigation strategy would go to Cabinet within a year. The Cabinet Member advised the Member to contact them to

ensure there’s follow up.

7 **HOUSING STANDARDS UPDATE**

The Chairman welcomed Councillor Mark Winn, Cabinet Member for Homelessness and Regulatory Services, Lisa Michelson, Service Director, Economic Growth and Regeneration and Jacqui Bromilow, Head of Environmental Health & Trading Standards to the committee meeting.

The following points were highlighted from the report:

- The tragic death of 2 year old Awaab Ishak and the Coroner’s report published in November 2022 highlighted to the risk of damp and mould. The Cabinet Member pledged that the Council would do everything possible to minimise the risk of such a tragedy occurring in Buckinghamshire.
- A report came to the 2023 February meeting of the Growth, Infrastructure and Housing Select Committee detailing the measures taken by Buckinghamshire Council to combat damp and mould.
- In 2022/23 there were 211 service requests relating to excess cold, or damp & mould. This compared to the 99 requests received in 2021/22, demand increased twofold compared to the previous year.
- It was noted that many tenants fear eviction if they raise concerns about damp and mould, however there were legal protections in place to protect residents.
- In collaboration with Opportunity Bucks, which looked at the 10 most deprived areas in Bucks, a project was ongoing to raise awareness of damp & mould, as well as create a referral pathway for partners to pass on information to the Council quickly.
- A 2 phase communications plan was set to launch in early October focusing on prevention, and what actions people can take to manage damp and mould. The team would work closely with other teams to ensure messaging is consistent with energy efficiency messages. Later on in November/December, alongside winter messaging focused on cost of living and heating advice, further information would be disseminated on damp & mould and how to report it.

During discussion, comments and questions raised by the Committee included.

- Households were facing a lot of pressure with cost of living crisis, where necessary affected residents are signposted to the helping hand scheme, as well as suggesting contacting (where appropriate) their social housing provider for particular schemes they have in place.
- Of the 82 improvement notices issued in the previous year referenced in 2.7 of the report, 7 were served to social landlords, and the remainder were to private sector landlords. It is important to note that social and private landlords are not treated differently with respect to enforcement action. At times where a hazard has been identified that may require formal action the social landlord has matters in hand and therefore does not require a notice to be served to remedy the defect.
- Improvement Notices may have varied time lengths attached them. This would be dependent on the works required to be undertaken. Tenants are kept in properties where possible. If compliance isn’t forthcoming, works may be commenced by the Council to fix the problem (recovering costs from the landlord afterwards), and a formal civil penalty pursued where appropriate.
- Members were reassured that the Council had a good working relationships with Social Housing Providers, and attended quarterly meetings with providers. Making every visit count was a scheme whereby visitors (e.g. trades people) would be bale to recognise signs of damp & mould and inform the resident/provider.
- As part of Opportunity Bucks programme, work was done with housing associations to ensure that improving standards for residents was addressed for all tenants within the

County. It was noted that when tenants left social housing, if carpets were in good condition, they could be 'gifted' to the next tenant, rather than ripped out. Historically, there had been reluctance to do so as this could indicate carpets were the landlords responsibility.

- The Energy Doctor scheme was highlighted. This scheme allowed eligible households to request a visit from a domestic resource efficiency officer (Energy Doctor) to advise on ways the household can reduce energy consumption. More information was available on the Buckinghamshire Council website.

8 WORK PROGRAMME

The Committee noted the Work Programme. Members could contact the Scrutiny Officer for the committee with any additional topics they wished to be included in the Growth, Infrastructure and Housing work programme.

9 DATE OF NEXT MEETING

The next meeting will take place 23rd November 2023 at 10.00 a.m.

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Visitor Economy Update

Select Committee meeting – 7 September

Growth, Infrastructure & Housing Select Committee – 7 September

1. Overview of Strategy development process to date (Cllr Rachael Matthews)

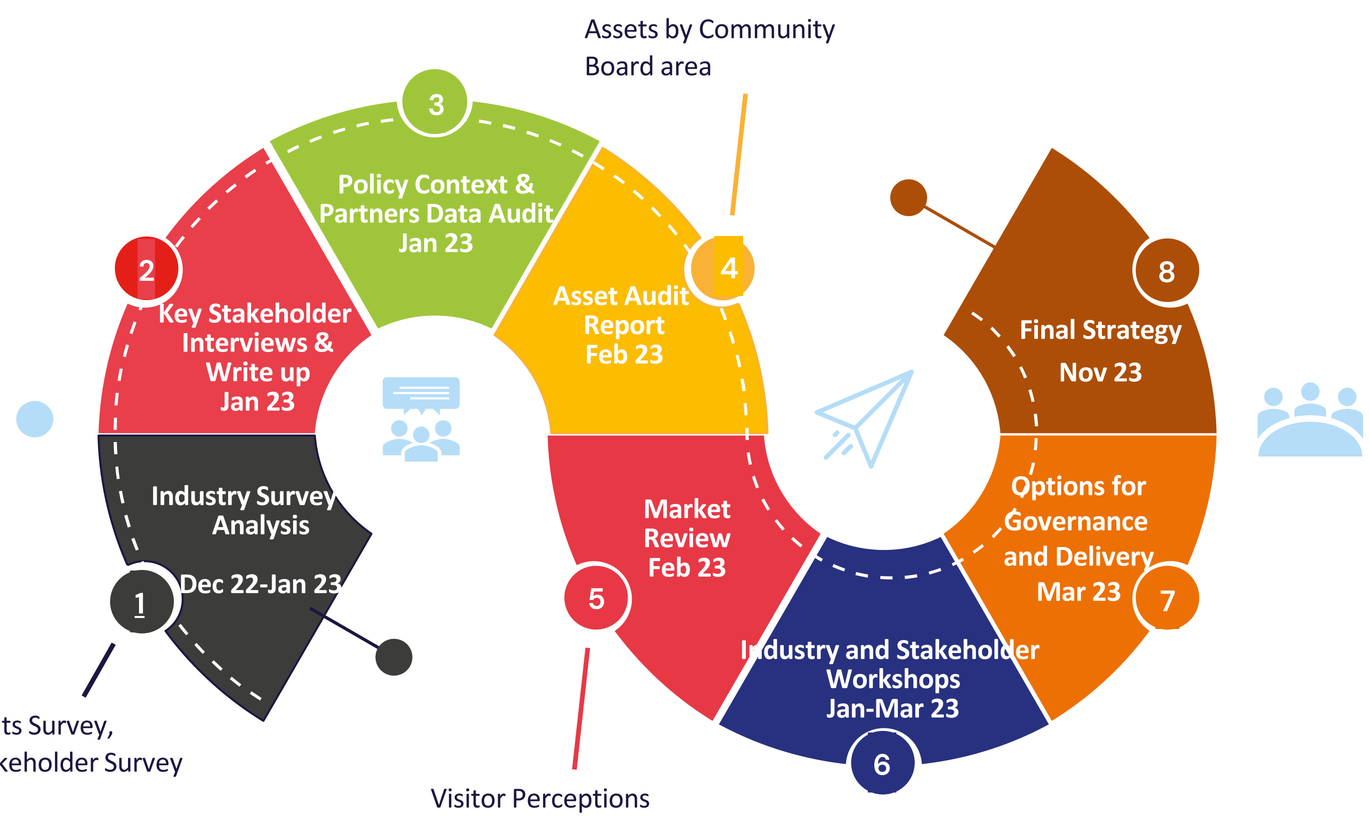
2. Buckinghamshire's Visitor Economy (Richard Dickinson, Tomorrow's Tourism)
   a. Buckinghamshire vs. neighbouring counties
   b. Business base
   c. Visitor profiles
   d. Strengths, Weakness, Opportunities & Threats
   e. Key Themes and Strategic Priorities

3. Next Steps (Cllr Rachael Matthews)

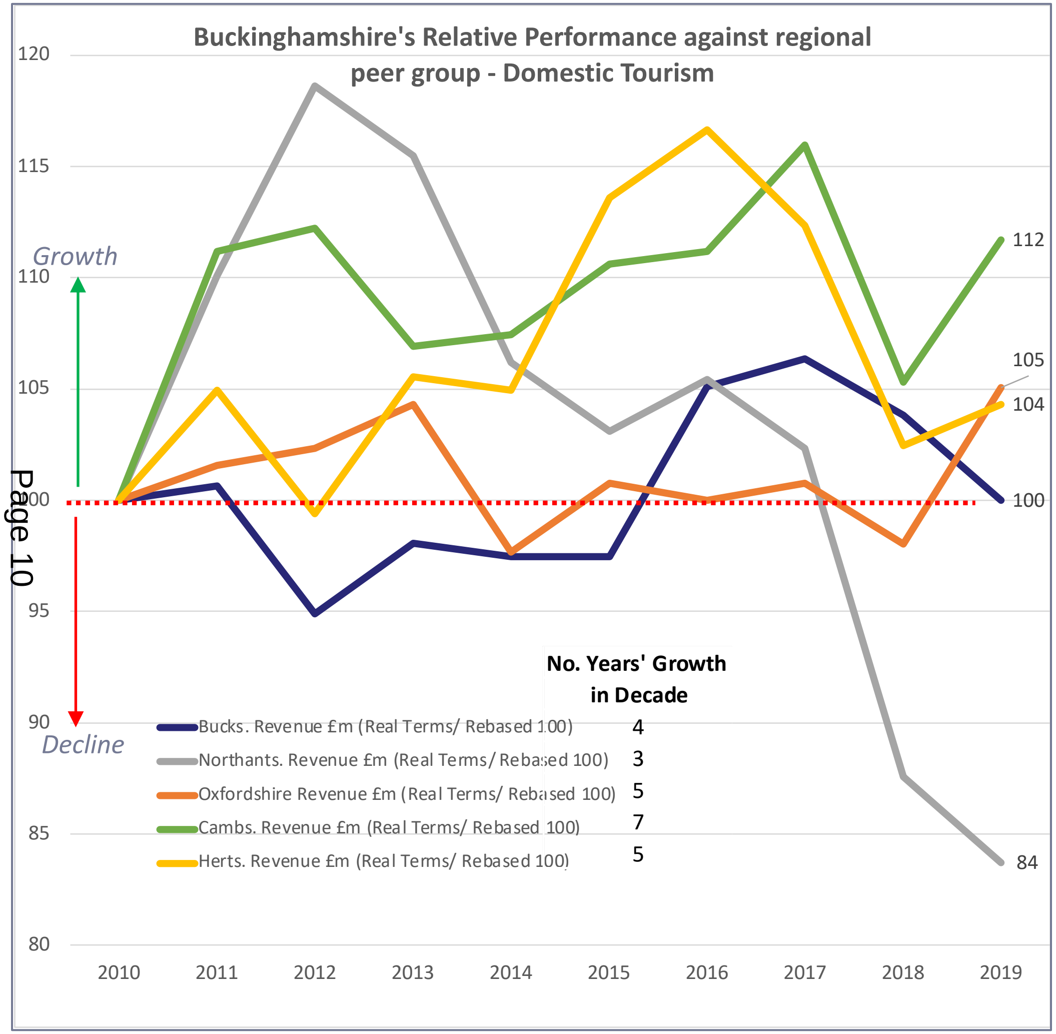
The Strategy so far

Project Stages

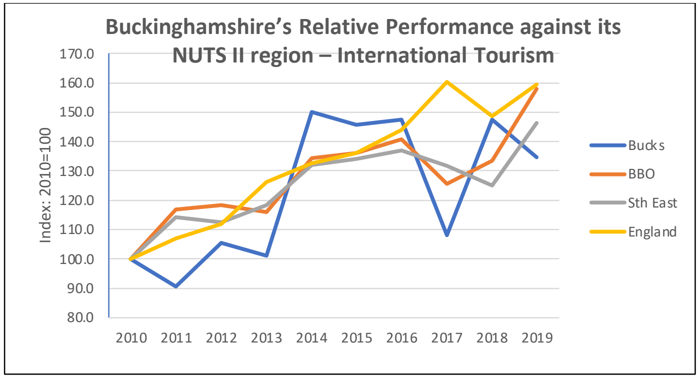
A sequential process based on survey, analysis, stakeholder consultation Interviews and research



The Challenge – A Lost Decade

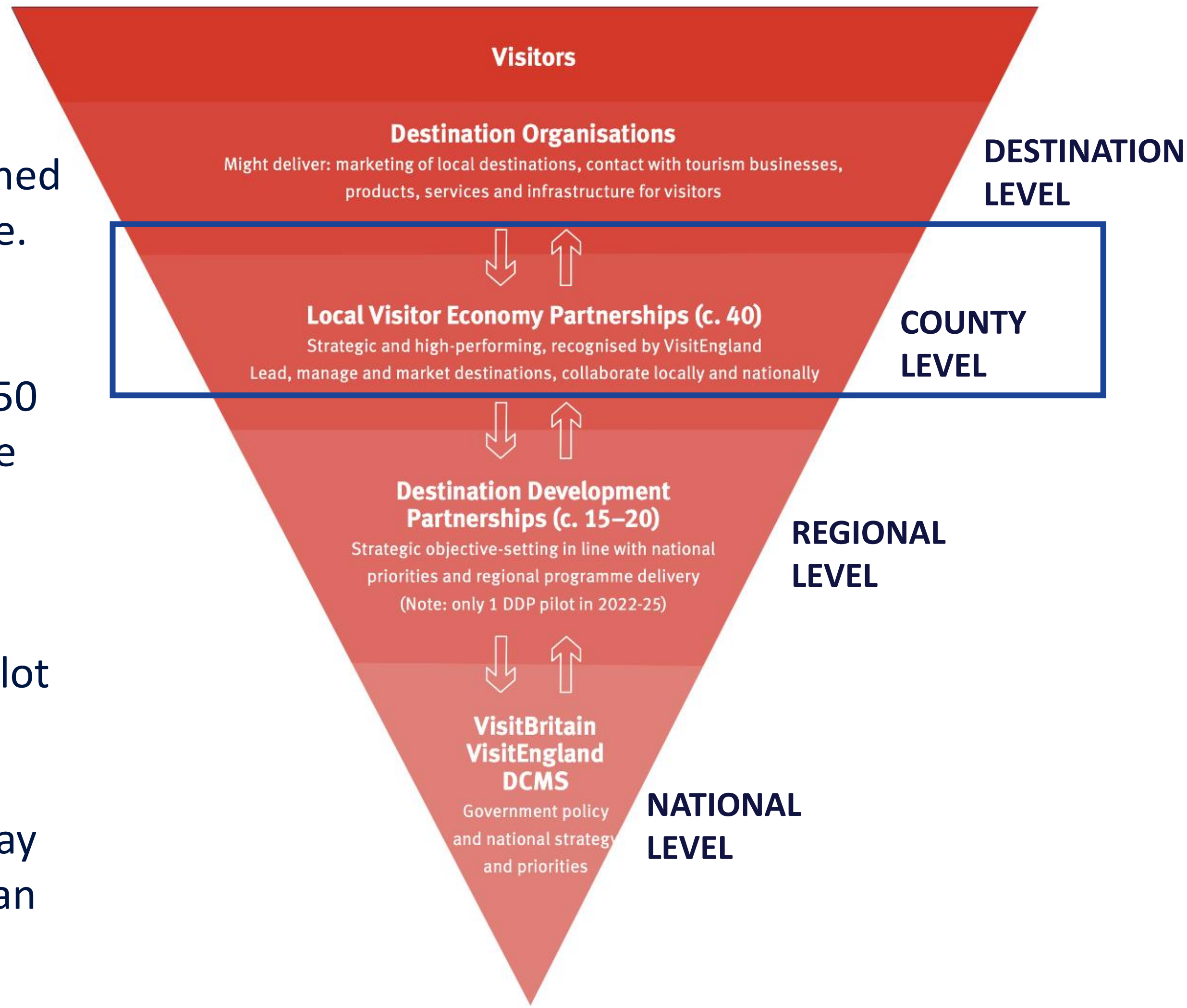


- The key issue for the County is that the Visitor Economy has shown no real-terms growth over the last decade. Only Northamptonshire has performed worse amongst this peer group, possibly reflecting issues with its wider governance.
- Domestic tourism (shown in the chart on the left) is the driver in income and jobs terms – with £157m spent annually at both ends of the decade in the County – similar to Cambridgeshire – which grew in nominal terms from £156m to £210m over the same time period.
- It is the same story with international visitors – the similar graph below shows performance against the NUTS II regional group and England.
- Bucks’ sluggish performance has meant less income and fewer jobs for its residents - whereas Cambridgeshire will have created some 1,000 new jobs from its domestic staying tourism performance alone.



The Opportunity – A new national Policy context

- Local Visitor Economy Partnerships will be established to drive greater performance.
- The number of Destination bodies will reduced from c150 to c40 – and counties are the ideal geography
- Agreed Government policy delivered by VisitEngland. Pilot in the North East
- The strategy is part of the way in which Buckinghamshire can fit into this picture and gain from it.



Current Performance

33rd out of 49

Buckinghamshire ranks 33rd out of 49 English counties for domestic tourism day visits.
Business related travel is the main driver of domestic tourism, ranking 11th in the country in this category, while visiting friends and relatives (37th) and holidays (41st) rank significantly lower. Buckinghamshire falls to the bottom 10 in the country for overnight domestic tourism and spend.

Over 60%

of visits to seven different destinations in Buckinghamshire were found to be made by residents.

2,326

The visitor economy sector is made up of 2,326 businesses. Some 15% of these are directly involved in tourism, i.e., accommodation and tourist attractions. The primary and secondary visitor economy comprises 59% (businesses and services used by tourists such as bars and restaurants).

7,807 Jobs

It is estimated that expenditure by tourists directly generates around 7,807 jobs, of which 3,591 are FTEs. Analysis undertaken by Tomorrow’s Tourism in 2021 estimated a range of between 11,000 and 13,000 full-time and part-time jobs underpinned by visitor spending in the County.

-10%

In 2023, employment declined by a further 10% which reflects both the impact of COVID and the continued longer term decline that has been an unwelcome feature of tourism in Buckinghamshire.

Buckinghamshire Visitor Economy Asset Base

Accommodation

Of 7,772 rooms in the county, 71% are offered by serviced operations, 19% are non-serviced, with the vast majority of these being self-catering, and 10% provided by campsites.

Attractions

The main distribution of attractions is towards the south and west of the county. There is a relatively 'traditional' asset base comprising numerous historic properties and museums more suitable for older markets.

Food & Drink

Restaurants and cafés dominate the food and drink sector, while 47 pubs with rooms help to underpin the rural / countryside offer. As a broad overall estimate, at least 20% of spending in restaurants and cafés is likely to be related to visitor spending

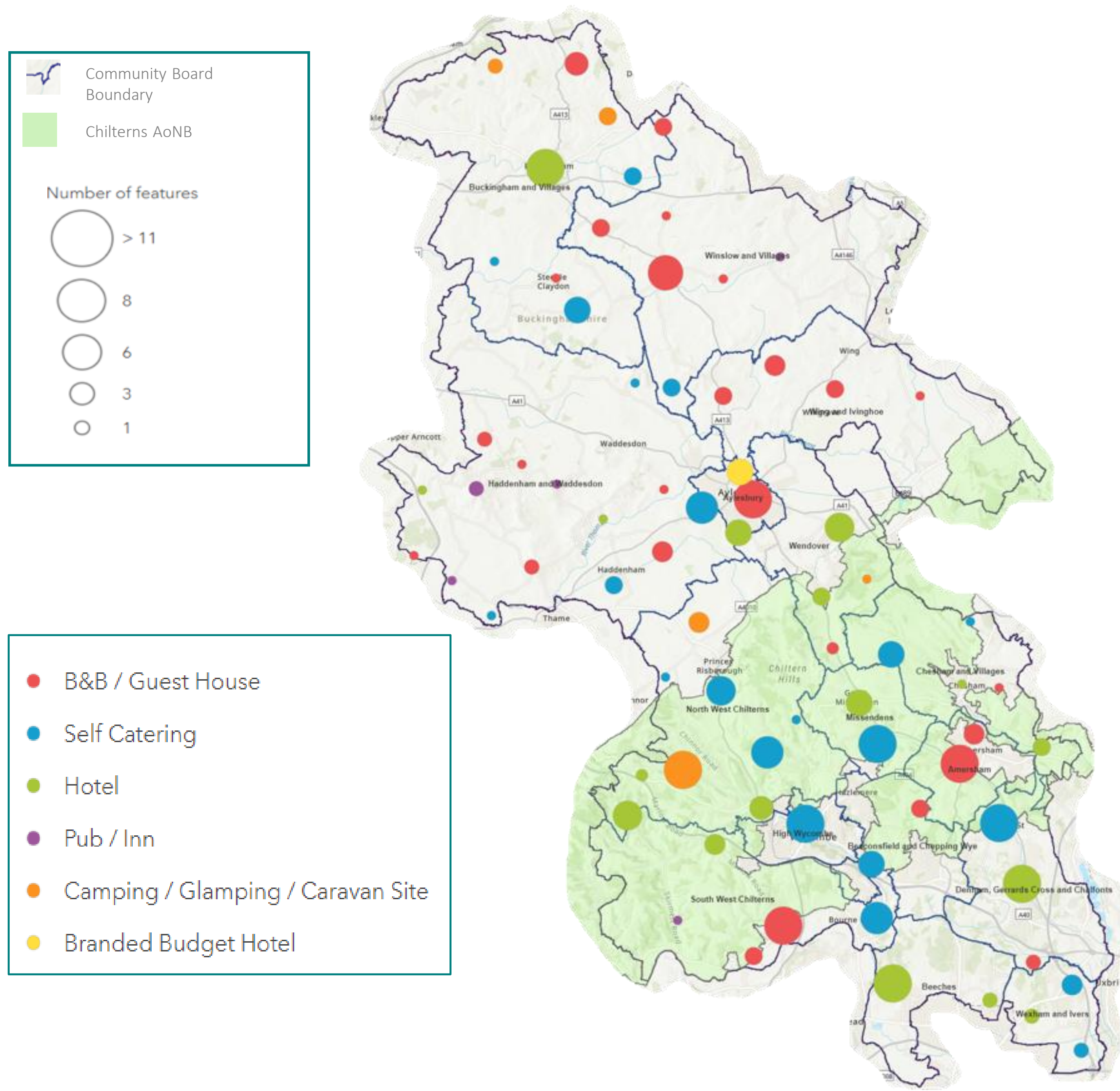
Festivals and Events

Over 170 events recorded across the year, approximately 16% of these taking place in the Chilterns.

Buckinghamshire's Accommodation - Clusters

Accommodation

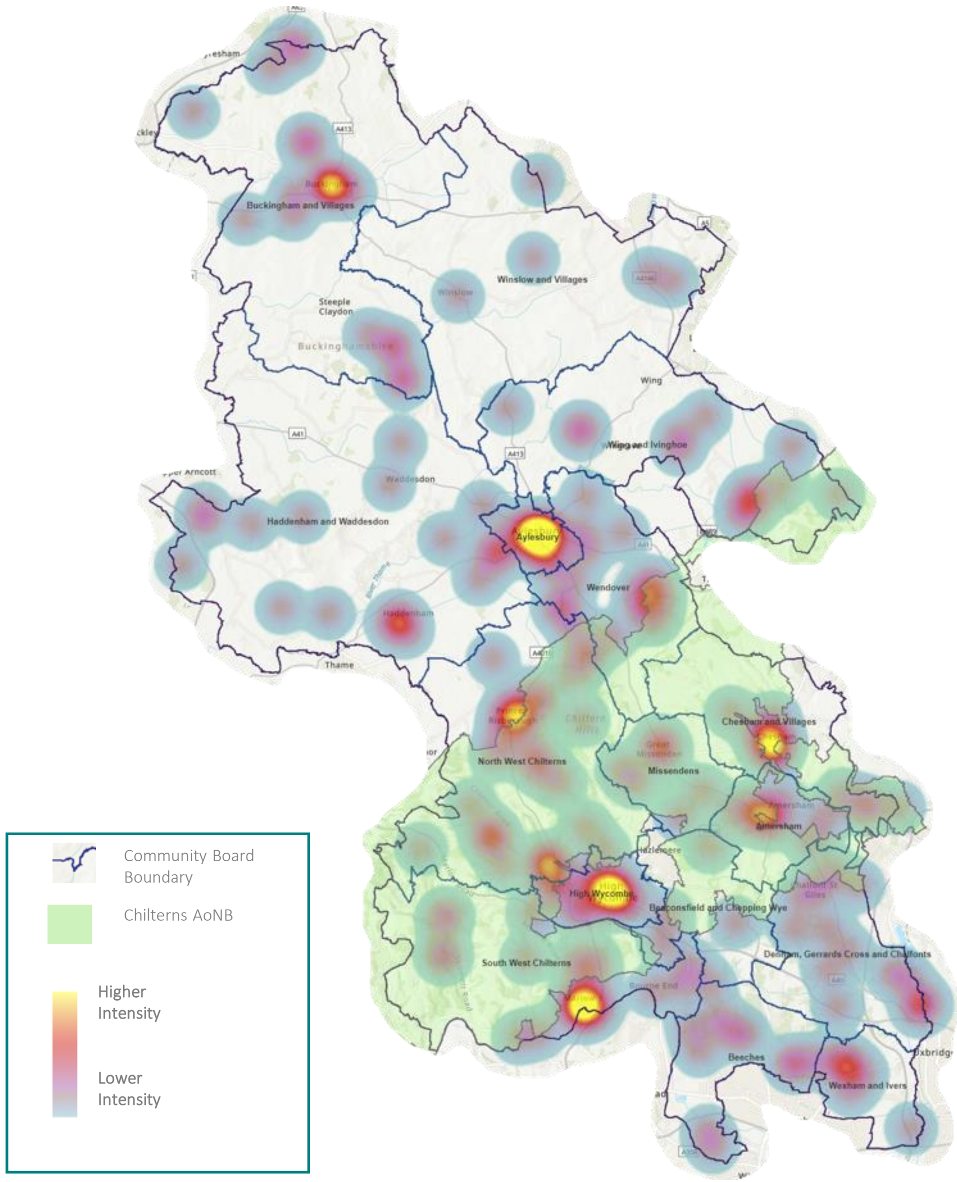
Of 7,772 rooms in the county, 71% are offered by serviced operations, 19% are non-serviced, with the vast majority of these being self-catering, and 10% provided by campsites.



Buckinghamshire Visitor Attractions – Heat Map

Attractions

The main distribution of attractions is towards the south and west of the county. This is a relatively 'traditional' asset base comprising numerous historic properties and museums more suitable for older markets.

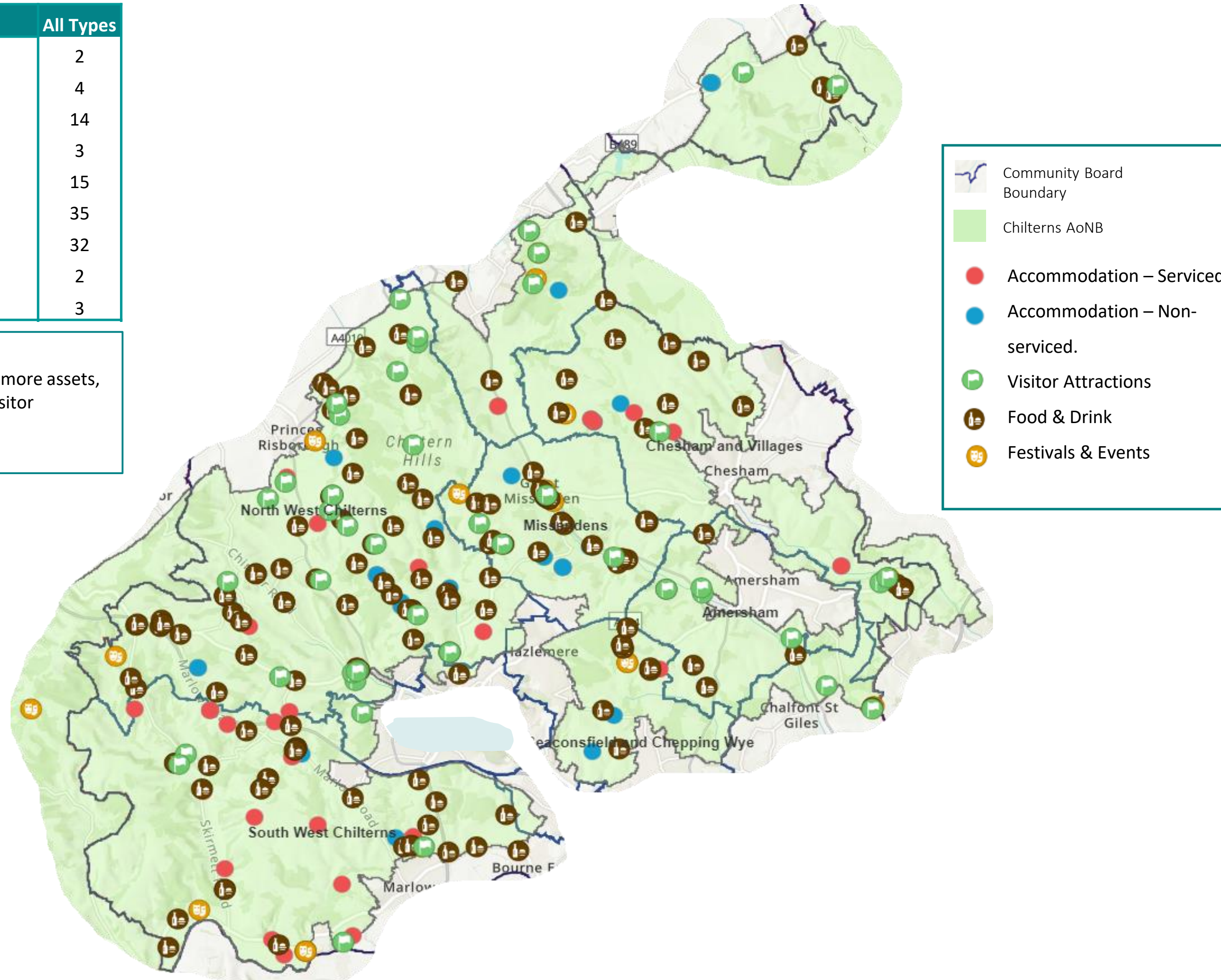


A Spotlight on Buckinghamshire’s Chilterns

Chilterns Accommodation by CB	All Types
Amersham	2
Beaconsfield and Chepping Wye	4
Chesham and Villages	14
Denham, Gerrards Cross and Chalfonts	3
Missendens	15
North West Chilterns	35
South West Chilterns	32
Wendover	2
Wing and Ivinghoe	3

Notes:

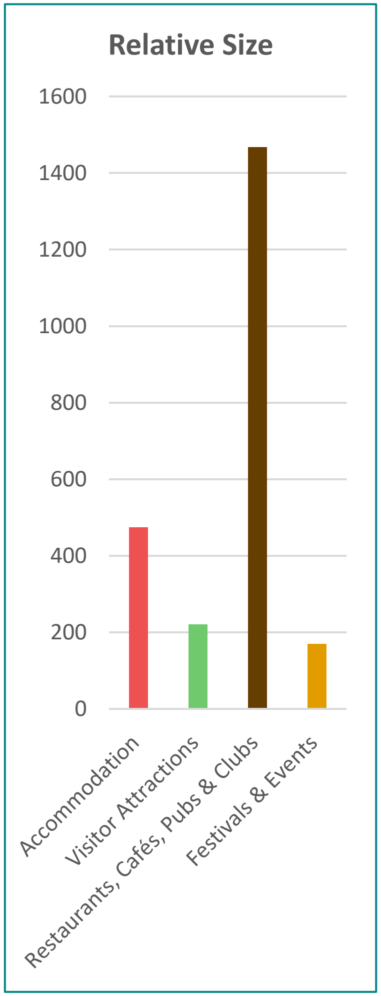
1. Some establishments have two or more assets, typically a pub serving food or a visitor attraction with a café.
2. Events relate to 2022/23



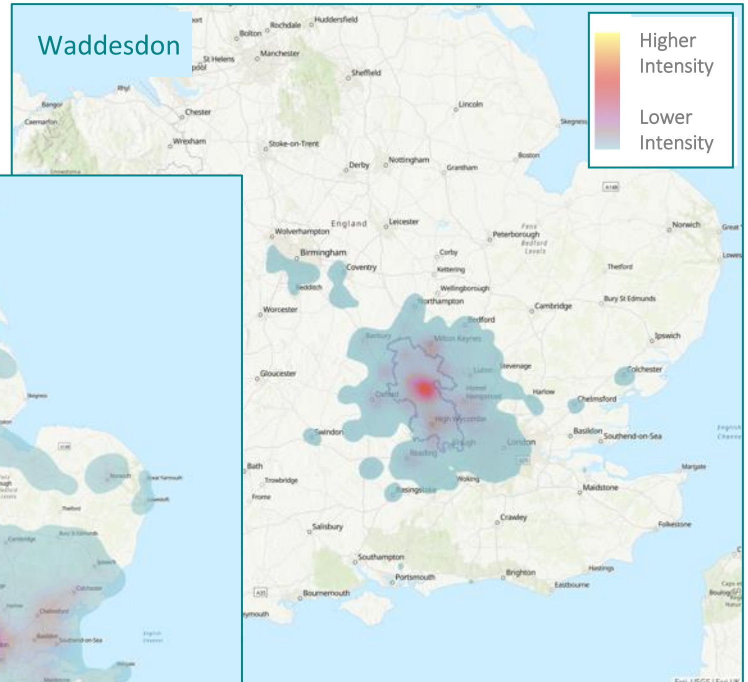
Total # Assets In the Chilterns

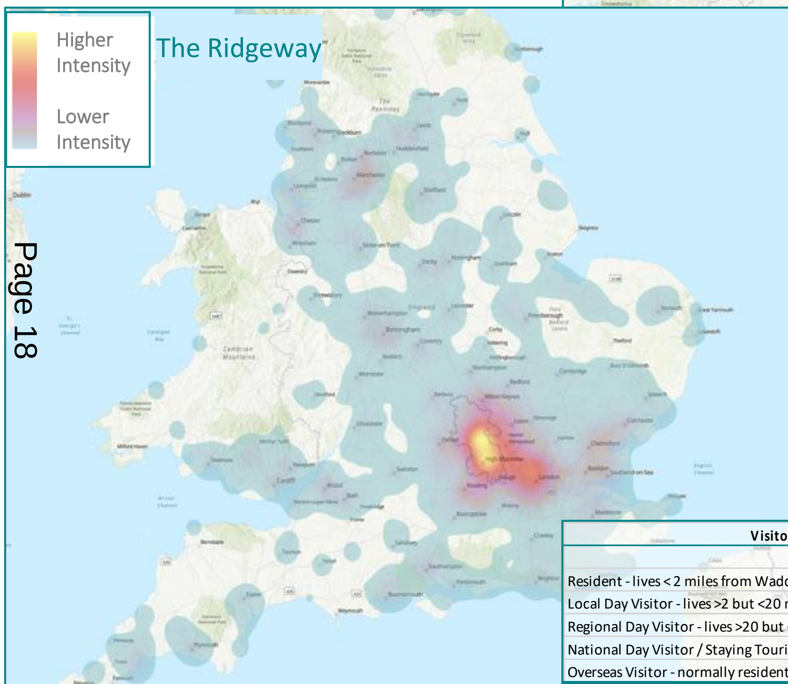
Total Stock

Table 1 Assets	Accommodation		Visitor Attractions		Restaurants, Café's, Pubs & Clubs		Festivals & Events	
Community Board	**Nos.**	**%**	**Nos.**	**%**	**Nos.**	**%**	**Nos.**	**%**
Amersham	17	4%	11	5%	77	5%	16	9%
Aylesbury	33	7%	20	9%	182	12%	14	8%
Beaconsfield and Chepping Wye	19	4%	3	1%	107	7%	2	1%
Beeches	17	4%	10	5%	76	5%	2	1%
Buckingham and Villages	46	10%	21	10%	94	6%	23	14%
Chesham and Villages	16	3%	13	6%	75	5%	14	8%
Denham, Gerrards Cross and Chalfonts	44	9%	13	6%	99	7%	18	11%
Haddenham and Waddesdon	39	8%	16	7%	108	7%	12	7%
High Wycombe	38	8%	16	7%	145	10%	1	1%
Missendens	17	4%	7	3%	41	3%	3	2%
North West Chilterns	45	9%	31	14%	99	7%	6	4%
South West Chilterns	67	14%	22	10%	139	9%	41	24%
Wendover	24	5%	14	6%	77	5%	6	4%
Wexham and Ivers	9	2%	7	3%	29	2%	3	2%
Wing and Ivinghoe	19	4%	12	5%	58	4%	4	2%
Winslow and Villages	24	5%	5	2%	61	4%	2	1%
Total	**474**		**221**		**1,467**		**170**	



Where Visitors Live – The Ridgeway & Waddesdon





Visitor Type	Unique Visitors		Total Visits	
	#	%	#	%
Resident - lives < 2 miles from Waddesdon Manor	95	2.6%	503	7.4%
Local Day Visitor - lives >2 but <20 miles from Waddesdon Manor	1,760	48.2%	3,727	54.8%
Regional Day Visitor - lives >20 but <100 miles from Waddesdon Manor	1,656	45.4%	2,382	35.0%
National Day Visitor / Staying Tourist - lives >100 miles away	109	3.0%	148	2.2%
Overseas Visitor - normally resident outside of the UK	29	0.8%	37	0.5%

Visitor Type	Unique Visitors		Total Visits		Repeat Ratio	
	#	%	#	%		
Resident - lives < 2 miles from the Coombe Hill - Ridgeway	342	4.2%	4,633	19.6%	13.5	:1
Local Day Visitor - lives >2 but <20 miles from Coombe Hill	5710	69.4%	15,424	65.2%	2.7	:1
Regional Day Visitor - lives >20 but <100 miles from Coombe Hill	1,906	23.2%	3,213	13.6%	1.7	:1
National Day Visitor / Staying Tourist - lives >100 miles away	219	2.7%	335	1.4%	1.5	:1
Overseas Visitor - normally resident outside of the UK	50	0.6%	62	0.3%	1.2	:1

These maps show the home location of visitors to two of Buckinghamshire's key leisure attractions.

Waddesdon – by some measure the most popular visitor attraction as voted for by residents – draws from a local visitor market which can be seen by the map. This is helped by its discounted residents' scheme. It is also a firm favourite as a day out for those that live between 20 and 100 miles away.

The Ridgeway draws visitors from further away – reflecting its status as a National Trail – and volumes are greater – but it still has a very loyal local market, greater in percentage terms than Waddesdon, reflecting walkers from home and those living up to 20 miles away.

Consultation – Business Response Overview

- 734 respondents
  - 20% Businesses
    - 97% based in Buckinghamshire
    - 70% from Visitor Economy or related
    - 63% members of Visit Buckinghamshire
    - 60% with less than 10 employees
    - 22% in the cultural sector
    - 20% from registered charities
  - 73% Residents
  - 7% Other interested stakeholders

Consultation – Residents‘ Profile & Views

- 734 respondents
  - 20% Businesses
  - 73% Residents
    - 55% live in a town, 35% in a village, 8% in a rural area
    - 59% are employed, 11% are self employed, 14% are volunteering
    - With a score of 4.6 out of 5, the environmental benefits of visitors are rated as the most important to residents
    - With a score of 4.3 out of 5, residents also see visitors bringing benefits to local businesses
    - However 76% have observed negative impacts in the form of litter from walkers or other visitors
  - 7% Other interested stakeholders

Visitors’ perceptions of Buckinghamshire

RESULTS

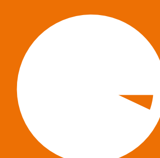
9.6%

of non-residents falsely associated the county with royalty

RESULTS

7.9%

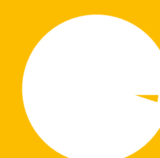
did not know anything or knew very little about the county



RESULTS

5.6%

associated the county with the Chilterns, nice countryside, villages and scenery



Tomorrow's Tourism / XV Insight - (2022) Survey undertaken as part of work relating to Northamptonshire Visitor Economy Evidence base (734 respondents)

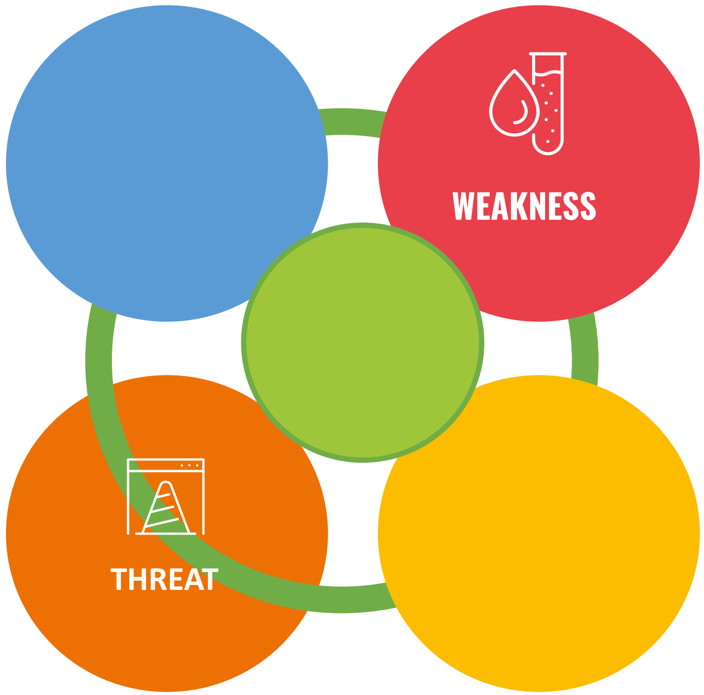
Strengths and Opportunities

- Strong independent food & drink offer
- Well respected hospitality sector
- Home of the UK film industry – one of the most filmed counties in the UK
- Developing Festival of Stories
- Walking & cycling in the Chilterns.
- World class sport at Silverstone.
- Birthplace of the Paralympic Movement
- Direct Chiltern Railways line from London into certain areas of county including quintessentially English market towns.

- Proximity to London for day & overnight visits
- Collaboration & partnership working to maximise potential of existing promotional budgets.
- New bed stock being developed around Silverstone – 381 beds by 2024.
- Development of LVEP with whole county and potential with adjacent counties
- Potential of unoccupied council property for conversion to hospitality/ accommodation
- Encourage 'honeypot' sites to distribute their visitors post-visit.
- Exploit low-cost social media marketing.

Weaknesses and Threats

- Not clear how the international visitor market is going to develop post Covid.
- Impact of 'Cost of Living' crisis on domestic visitor numbers and behaviours.
- Nationwide staffing challenges in the hospitality sector and concomitant need for skills and apprentice support.



- Lack of clear brand and sense of place for the county & consequently limited marketing/perception of area as a tourist destination
- Boundary confusion as to which areas are in Buckinghamshire
- Planning strategy does not yet fully support the needs of the visitor economy sector.
- Limited budgets, both public sector and private, with numerous organisations doing elements
- No clear single source of information for the visitor – what's on & how to link it all together.
- Limited means to get visitors from rail hubs to attractions and other assets.
- Limited north / south transport links across county and inadequate bus services to meet the needs of sustainable travel.
- Need a wider range of accommodation options, especially high standard camping/glamping.
- No major year-round attraction or large annual event/festival to pull visitors into the area.

Opportunities

The existing public transport system

to work harder in bringing visitors to the county – particularly Chiltern Railways

Greater potential of the London market

- Family market – day trips
- Young independents/older couples – weekend/midweek breaks

The creation of itineraries and packages

This makes it easier for potential visitors to see what they could do – there is so much on offer but no clear way to see it at the moment.
More bookable experiences and links with local accommodation providers could yield greater numbers of staying visitors.

Others

- **Alternative use of media for marketing**
- **Encouraging 'honeypot' sites to promote other visits**
- **More strategic use of large accommodation providers**
- **Information and insight sharing**

Key Themes

Countryside, Walking & Cycling

- Making the most of our unique green spaces, woodlands, villages and countryside.
- Providing more experience opportunities for visitors to interact with our countryside.
- Strengthening our rural accommodation offer.

Culture, Festivals, Events and Film industry

- Working with Buckinghamshire Culture and others to maximise opportunities for residents and visitors.
- Working with festival and cultural experience providers to strengthen our offer.
- Working with our Film Office to identify opportunities to promote our county and develop our film tourism offer.

Local Food & Drink

- Promoting our strong local food and drink producers.
- Exploring opportunities for new events and experiences encouraging interaction with the food and drink sector.

Accessibility

- Building on our heritage as the Birthplace of the Paralympics. Working to make our visitor economy more accessible and open to all.
- Working with businesses to put this into practice.

Strategic Priorities

	Strategic Priorities	Score
Core	Improving the marketing and promotion of Buckinghamshire	8.60
Core	Strengthening Visit Buckinghamshire to deliver the agreed priorities	8.34
Core	Encouraging new visitor attractions, activities, events or experiences	8.21
Core	Improving collaboration across public and private sectors	7.88
Core	Encouraging Buckinghamshire's visitor economy to become more accessible	7.82
Comp.	Improving the quality of service offered by visitor facing businesses	7.61
Comp.	Encouraging Buckinghamshire's visitor economy to become more sustainable ...	7.38
Comp.	Improving the quantity / quality of research and strategic insight to support the VE	7.22
Comp.	Improving the productivity of businesses in the visitor economy	7.02
Comp.	Encouraging the development of the meetings, conferences and exhibition sector	6.79
Comp.	Encouraging new forms of accommodation	6.01

Sample n=78 Businesses and Stakeholder organisations / Score out of 10 / 'Comp.' - Complementary

Strengthening partnerships and collaboration to support delivery

Delivering the strategy – to implement and deliver on the priorities identified in the strategy

Funding – to seek further funding and financial support from national and regional sources.

Increase engagement and partnership-working – to improve the performance of the visitor economy and develop partnership working

Policy and decision-making – to ensure visitor economy is integral in decision making for the county and supports wider priorities for Bucks

Improving the marketing and promotion of Buckinghamshire as a destination

Branding – to raise awareness of the Visit Buckinghamshire brand

Marketing – to improve marketing to promote Buckinghamshire more effectively as a visitor destination

Increasing visitor numbers, economic spend and overnight stays

Events – to support the growth of the events sector

Experiences and itineraries – to develop the experiential tourism offer

Co-design of tourism product – to work collaboratively to maximise sector growth

Ensuring the sector is fit for the future

Accessibility – to make the visitor experience accessible and inclusive

Sustainability – to encourage sustainability across the sector

Infrastructure – to grow the infrastructure to support the visitor economy

Business Support – to support businesses in the sector and facilitate growth

Next steps

- September - Input from Select Committee fed back to strategy drafting process.
- Coming months – strategy finalised and Cabinet signs off
- New Year– Strategy approved and published.

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7.1 Volume & Value of Tourism – 2019 Baseline

Chart 1 - Buckinghamshire - All Domestic Overnight Trips - Long-term Trend by Area ('000 of trips)

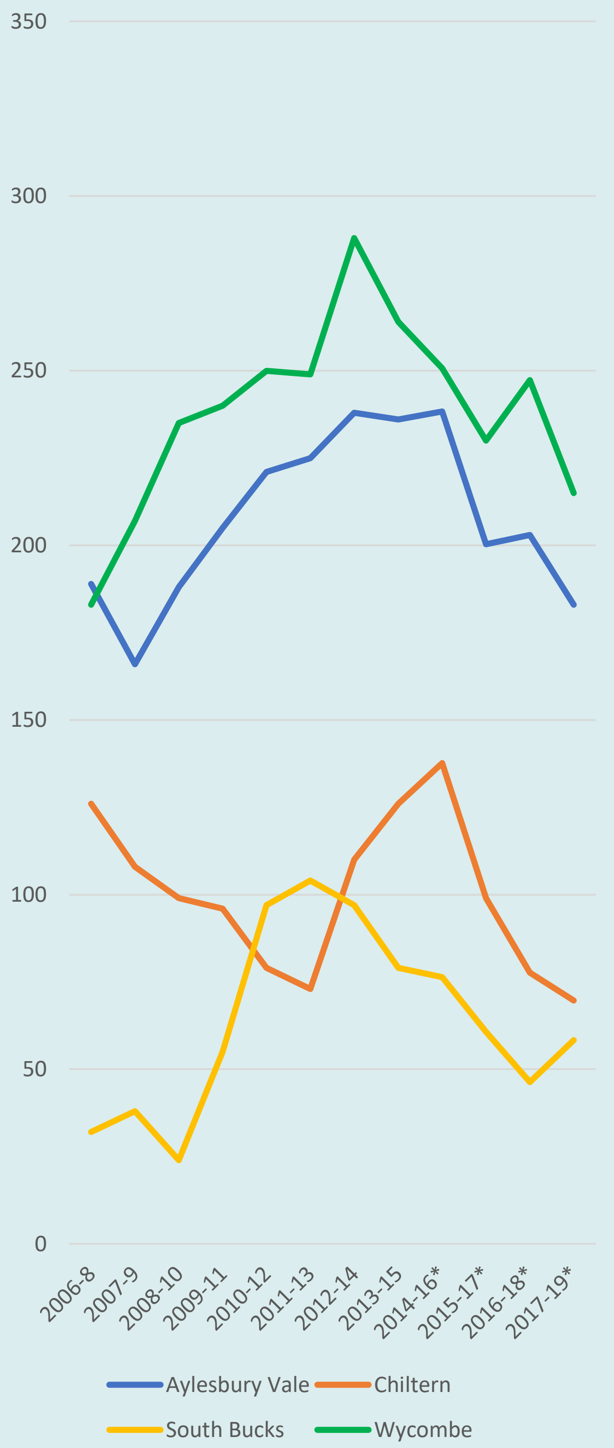

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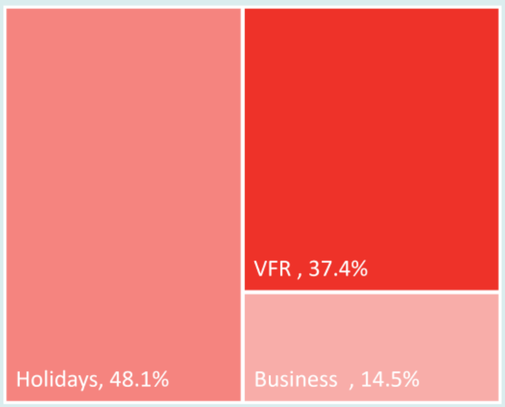
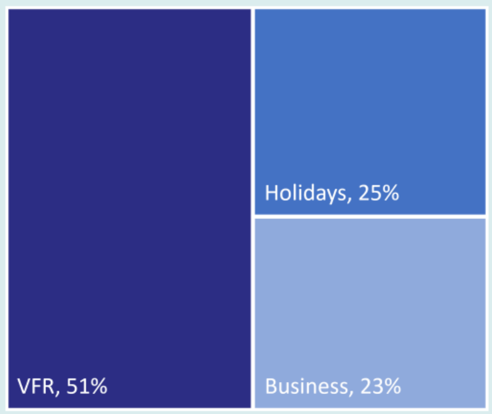
Table 1. Summary of Market Size

Visit Type	Volume (million)	Share	Value (£million)	Share
Domestic Day Visits	19.2	92.9%	£856	73.5%
Domestic Overnight Visits	1.098	5.3%	£157	13.5%
Inbound Visits	0.36	1.7%	£152	13.0%
Total	**20.66**		**£1,165**	

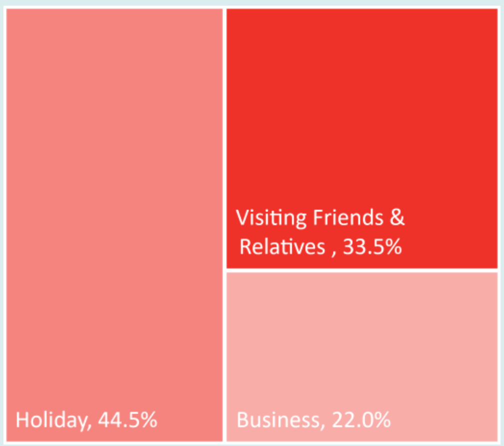
Domestic Tourism - England % Split by Trip Purpose (2017-19)



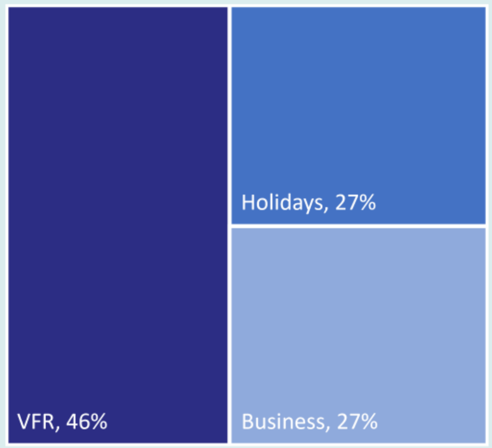
Domestic Tourism - Buckinghamshire % Split by Trip Purpose (2019)



Inbound Tourism - England % visits split by trip purpose (2017-19)

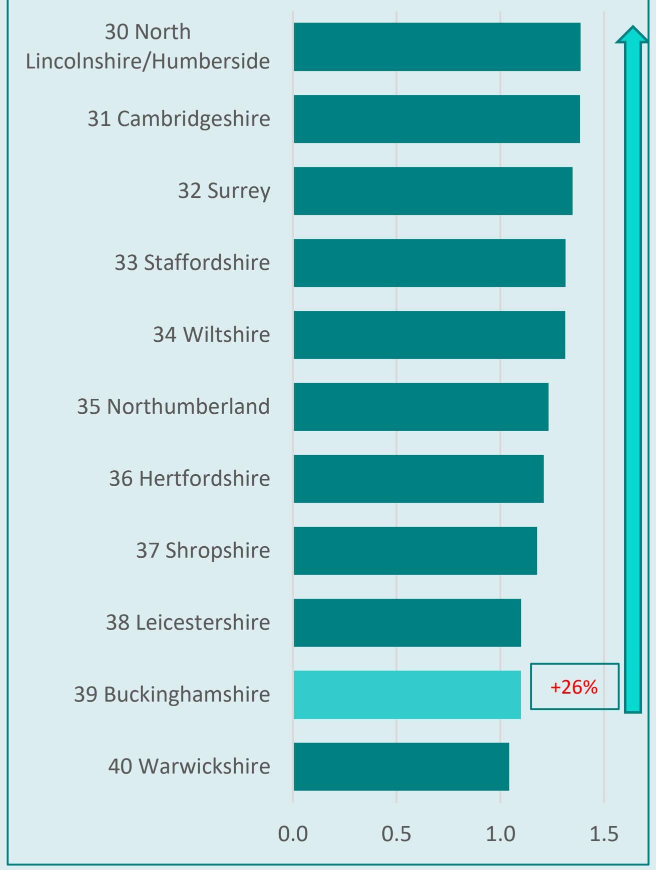


Inbound Tourism - Buckinghamshire % visits split by purpose (2017-19)

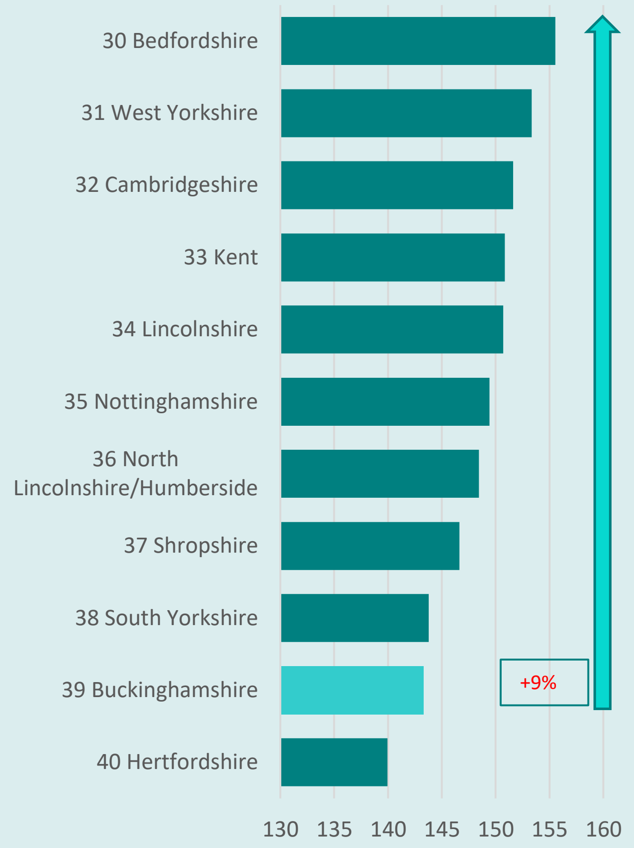


Buckinghamshire's Place in England's Tourism League Table

Overnight Trips 2017-19 (millions)



Overnight Trips 2017-19 - Spend per trip (£)



1. Table 1 reflects demand in 2019 showing some 20 million visits and spending just over £1bn. Post COVID figures will not be as good while the split, shown in the red and blue squares to the left has also radically changed i.e. when looking at international. The table also includes the volume and value of day visits, which dominate to a greater extent then other competitor counties.
2. The other charts and graphs on this page track overnight tourism. The league tables above show that in terms of both total trips and spend, the County is in 39th place. Retaining more people to stay rather than come for a day visit will also help overall share figure for tourism in Table 1.
3. Chart 1 shows the 12 year trend for each of Buckinghamshire's areas. Over 1.4m domestic visitors stayed in 2019 of which around 77% stayed in either Aylesbury Vale or Wycombe.
4. For the inbound market, VFR is very buoyant with the County over-indexing the national share by a significant 10.5%. This again reduces value added as by definition this group will not use paid accommodation. Holiday trips are 60% of the England average while business is a robust share.

Minute Annex

Notes:

1. Sources: VisitBritain (2019) Great Britain Tourism Survey & Great Britain Leisure Day Visits Survey & ONS (2019) – International Passenger Survey
2. The domestic data are three year average of trips taken wit the baseline considered as 2017 – 19 given interruptions in the Surveys during the COVID-19 pandemic. Such an average helps with robustness given small sample sizes.

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