



Report to Growth, Infrastructure & Housing Select Committee

Date:	7 September 2023
Title:	Visitor Economy Strategy Update
Cabinet Member(s):	CLr Martin Tett, CLr Rachael Matthews and CLr Clive Harriss
Contact officer:	Matt Broadbent, Senior Economic Development Officer (matthew.broadbent@buckinghamshire.gov.uk)
Ward(s) affected:	None specific
Recommendations:	1. To endorse the direction of travel for the emerging Visitor Economy Strategy and Action Plan taking stock of the opportunities and data identified in this paper. 2. To support Visit Buckinghamshire in seeking accreditation as a Local Visitor Economy Partnership under the VisitEngland programme.
Reason for decision:	To develop a more coherent, strategic approach to growing our visitor economy making it an attractive offer for our residents and visitors; and to support our businesses in the tourism sector.

1. Executive summary

- 1.1 Buckinghamshire's visitor economy is currently worth approximately £1.1 billion and is driven by a strong small business base. We currently rank relatively low as a county for domestic travel but a more focused approach to developing our visitor offer could lead to improvements in terms of overnight stays and day trips from

outside the area. Developing our visitor offer will also be beneficial to Buckinghamshire residents, making the county a more attractive place to live.

- 1.2 The Economic Growth & Regeneration Service has spent the last year developing a Visitor Economy Strategy and Action Plan for Buckinghamshire alongside some of the Council's key strategic partners and based on input from businesses and Buckinghamshire residents.
- 1.3 Since the Growth, Infrastructure & Housing and Communities & Localism Select Committees met last summer, we have gained much more data, engaged more with partners and stakeholders and a wider understanding of our visitor economy across the county and how the Council and partners can support it.

2. Content of report

Background

- 2.1 The Growth, Infrastructure & Housing and Localism Select Committees held a joint meeting 13 July 2022. Support was given for the development of a Visitor Economy Strategy and supporting Action Plan for Buckinghamshire, to be led and funded by the Council in partnership with Visit Buckinghamshire (our Destination Management Organisation) and other key stakeholders.
- 2.2 The project has been managed by the Economic Development Team with a joint Project Sponsor arrangement at Director level between Economic Growth & Regeneration and the Culture, Sport & Leisure Directorates. Buckinghamshire-based consultancy Tomorrow's Tourism were appointed to support this work.
- 2.3 This paper is presented to give CMT an update on the strategy development process in advance of the Select Committee meeting on 7 September, some headline findings, and next steps to be taken to produce our strategy and action plan. It also provides information on the Destination Management Organisation (DMO) review that is underway by VisitEngland at the national level

Tourism in Buckinghamshire overview

- 2.4 The visitor economy is a strategic opportunity for Buckinghamshire. Business growth in this sector creates benefits in terms of greater turnover, strengthening local supply chains, better place promotion and job creation – with tourism also being a ready provider of entry level jobs as well as more specialist and skilled roles.
- 2.5 Latest data (2019) shows that over £1.1 billion was spent in Buckinghamshire over 20 million visits. Buckinghamshire's tourism sector in 2022 comprised: 169 visitor attractions, 115 annual events and over 1,000 places to stay. The visitor economy consists of 2,125 businesses employing more than 21,000 people. Many of our tourism businesses are 'micro' businesses (under 10 employees) which gives

opportunities to cluster, curate and promote the broad range on offer at the level of place.

- 2.6 Buckinghamshire ranks 39th out of 49 counties for volume of domestic travel in terms of overnight stays and day trips, providing a prime opportunity to build. Although having a good variety on offer, Bucks has fewer opportunities for visitor spend than neighbouring Oxfordshire or Hertfordshire, particularly in terms of the number of food and drink outlets, performing arts, sports and amusement facilities.
- 2.7 Historically, the promotion of Buckinghamshire's tourism sector has been focused on 'place based' campaigns for individual towns or wider geographies, such as the Chilterns. The challenge to create a Buckinghamshire-wide level marketing voice drove Buckinghamshire Business First to develop a Destination Management Plan in 2013 and establish 'Visit Buckinghamshire and the Chilterns' as our Destination Management Organisation (DMO).
- 2.8 With the creation of a new unitary council, the onset of Covid and the impact this had on our hospitality and tourism sector, the need for a strategy for Buckinghamshire was recognised in order to take a more strategic and coherent approach, increase visitor numbers and support the wider local economy of Buckinghamshire.

Strategy development and engagement

- 2.9 Tomorrow's Tourism have carried out a variety of activities to help our strategy development and these include:
 - a) Desktop research and an 'asset audit' to determine the shape of Buckinghamshire's visitor economy and its performance against other county areas.
 - b) A deeper drive into seven places to determine catchment, visitor demographics and spend (Aylesbury; Buckingham; High Wycombe; Marlow; the Ridgeway (Coombe Hill area); Waddesdon and Pinewood).
 - c) Interviews of key visitor economy stakeholders.
 - d) Survey of businesses, residents and stakeholders (including Town and Parish Councils) that achieved an excellent response (734 replies)
 - e) Workshops with key businesses and stakeholders (from different hospitality/tourism sectors) including different teams across the Council.
- 2.10 The engagement process has helped develop a network of key players in the sector. Those who took part valued being asked and could see the potential of the strategy and want to be part of the journey as this is delivered. It has also helped to identify businesses who are driving innovation and partnership working to deliver a quality offer for visitors and can act as case studies/exemplars to others.

Key findings and opportunities

- 2.11 Stakeholder engagement and survey work has identified five core strategic priorities to steer the delivery of the Visitor Economy Strategy:
- a) Improving the marketing and promotion of Buckinghamshire
 - b) Strengthening Visit Buckinghamshire (DMO) to provide the overarching function and deliver the shared priorities
 - c) Encouraging development of new visitor attractions, activities, events or experiences
 - d) Improving collaboration across public and private sectors
 - e) Encouraging Buckinghamshire's visitor economy to become more accessible (focus on disability).
- 2.12 The research clearly demonstrates that Buckinghamshire has many different strengths and the focus should not be placed on trying to attribute one individual USP to our county. This large range of different strengths enable a narrative/story telling approach to place promotion to curate, pivot and target promotion of our varied visitor offer. This, in itself, can be seen as one of Buckinghamshire's key strengths – having an offer for different audiences will enable the county to capitalise on different visitor profiles all year round.
- 2.13 While historically we have had limited coordination at county level, the engagement from stakeholders across the county at the level of place will be a strong asset when curating products for visitors. Capitalising on this local, place-based knowledge will help to deliver a more effective strategy and action plan.
- 2.14 The analysis of our tourism business base shows:
- a) Since 2016 Bucks has seen an 843 per cent increase (from 79 to 745) in the number of non-serviced accommodation units (Airbnb, camping etc)
 - b) There is a greater supply of accommodation in the south of the county, particularly in the Chilterns – the largest provision being in the SW Chilterns community board area (Marlow and Hambleden Valley)
 - c) For Bucks, as a significant rural area, there is a lack of camping/glamping opportunities
 - d) The highest concentration of accommodation in the north of the county being in Buckingham
 - e) The Chilterns has an extremely strong offer with regards to high quality pubs/restaurants plus festivals and events.
- 2.15 Looking at the core market (catchment) highlighted that 92.9 per cent of total visitors are domestic day visits (19 million), with only 1.7 per cent (360k) being from

overseas. However, the value of overseas visits was 13 per cent (£152 million of the £1.1 billion overall spend).

- 2.16 With respect to overseas visitors, based on an analysis of seven locations (Aylesbury, High Wycombe, Buckingham, Marlow, The Ridgeway (Coombe Hill), Waddesdon and Pinewood) U.S. visitors made up almost 20 per cent of total overseas visits. This is a significantly higher share than the national average (7.7%). This is most likely due to our strong heritage/stately home offer and proximity to London.
- 2.17 The research highlights that there are an exciting range of marketing communications possibilities and avenues to explore as part of the action plan: balancing the conversion of domestic day visits to overnight stays v attracting international visitors and spend.
- 2.18 Analysis of the data and looking at our strengths and opportunities in the round, Tomorrow's Tourism propose that our Action Plan focuses on the following themes:
- a) *Countryside and Active Leisure*: The Chilterns provides an excellent offer for walking, cycling and outdoor experiences and has a strong local business base catering to both visitors and residents. We also have the highest number of National Trust properties of any English county meaning there is an excellent opportunity to work with our properties to develop a stronger experiential offer.
 - b) *Local Food and Drink*: 20 per cent of Buckinghamshire events relate to quality food and drink and we have a range of highly rated pubs and restaurants, breweries and vineyards. Developing a strong network between local producers and venues could create a unique offer
 - c) *Culture, Festivals, Events and the Film Industry*: We already have a wide variety of festivals taking place across the county. There is an opportunity to develop our existing festival offer and to work with organisers of potential future events. With the development of the Film Office over the long term, the proximity of Pinewood Studios and the strong selection of filming venues, this could be an area on which to build in the longer term.
 - d) *Accessibility and Inclusion*: Buckinghamshire is the birthplace of the Paralympic Movement and hosts the National Paralympic Heritage Centre. Building on the work already started here and with partners like BBF and Visit Buckinghamshire, Buckinghamshire could focus on becoming a more accessible destination.

VisitEngland and Local Visitor Economy Partnership (LVEP) Programme.

- 2.19 Concurrent to our strategy development work, VisitEngland and the National Tourist Board are currently reforming the way it works with and supports DMOs. It is looking to streamline this process by creating a tiering system that will require DMOs to

meet specific criteria to gain accreditation as a 'Local Visitor Economy Partnership' (LVEP).

- 2.20 Looking at Buckinghamshire as a whole, there are currently two DMOs: Visit Buckinghamshire and the Chilterns and Destination Milton Keynes. There will be DMO level discussion on the scope and scale of coverage for Buckinghamshire.
- 2.21 A key criterion for being recognised as a LVEP is having a Visitor Economy Strategy that outlines public and private sector support and a clear strategic direction. Our work to support Visit Bucks is very timely for this.
- 2.22 Gaining accreditation as an LVEP would allow Buckinghamshire to have greater support and potential funding from Visit England and DCMS and would put the county in a strong position to market itself as a distinct destination.

3. Other options considered

- 3.1 Not applicable.

4. Legal and financial implications

- 4.1 The Visitor Economy Strategy and Action Plan are in the final stages of development. Ahead of Member sign off and publication, engagement work is required with partners and key stakeholders to ensure deliverability of the emerging Action Plan and also to better quantify costings and funding sources.
- 4.2 This strategy is also designed to influence further investment from other areas, including industry and developing a more visible DMO will better place us for grants from elsewhere.

5. Corporate implications

- 5.1 The publication of the Strategy and Action Plan, as well as a greater focus on the opportunities identified during the development process, will contribute to the Corporate Plan priority 'Increasing Prosperity'.
- 5.2 A number of potential risks and threats have been identified around delivery of the Action Plan. Firstly, it is worth acknowledging that, while the Action Plan will look to identify a number of different strands of activities, we do have a limited capacity across the Council and DMO. In addition to this, a threat identified early on focuses on the potential negative implications of losing funding, which would mean difficulty achieving the objectives set out in the strategy.

6. Local councillors & community boards consultation & views

- 6.1 The Visitor Economy Strategy and Action Plan will be approved by Cabinet decision. Community Boards and Town and Parish Councils were invited to contribute to the development of the strategy through a stakeholder survey.

7. Communication, engagement & further consultation

- 7.1 Extensive engagement was carried out as part of the strategy development with a number of different Council service areas, including Culture, Sports & Leisure and Planning, Growth & Sustainability. The strategy was developed in collaboration with a number of external partners, including Buckinghamshire Business First and Visit Buckinghamshire. A survey and workshop were also carried out to seek the views of visitor economy businesses and stakeholders, including the LEP and across various different sectors including food and drink, accommodation and attraction providers. This engagement will continue beyond publication through the delivery of the action plan and strategy where we will need continued shared ownership with our key partners.

8. Next steps and review

- 8.1 This item will be included in the six-month update on January 2023 Budget Scrutiny discussions at Finance & Resources Select Committee on 25 September 2023.
- 8.2 The research to date has given the council the component parts it needs to develop the Visitor Economy Strategy and Action Plan. Work is underway to pull both of these documents together over the coming months.
- 8.3 The Action Plan will set out both strategic and practical activities in the short (one year), medium (five years) and long term (seven years). It will provide indicative resource implications (people and money) to support budget discussions/wider funding allocation identification and activity prioritisation to be made ahead of publication.
- 8.4 We will return to CMT for endorsement of the strategy and action plan when it is drafted, ahead of seeking adoption from Cabinet.

9. Background papers

- 9.1 VisitEngland (2023), *Local Visitor Economy Partnerships (LVEPs) Programme*.
<https://www.visitbritain.org/local-visitor-economy-partnerships-lvep-programme>

10. Your questions and views (for key decisions)

- 10.1 If you have any questions about the matters contained in this report, please get in touch with the author of this report. If you have any views that you would like the

cabinet member to consider, please inform the democratic services team. This can be done by email to democracy@buckinghamshire.gov.uk.