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

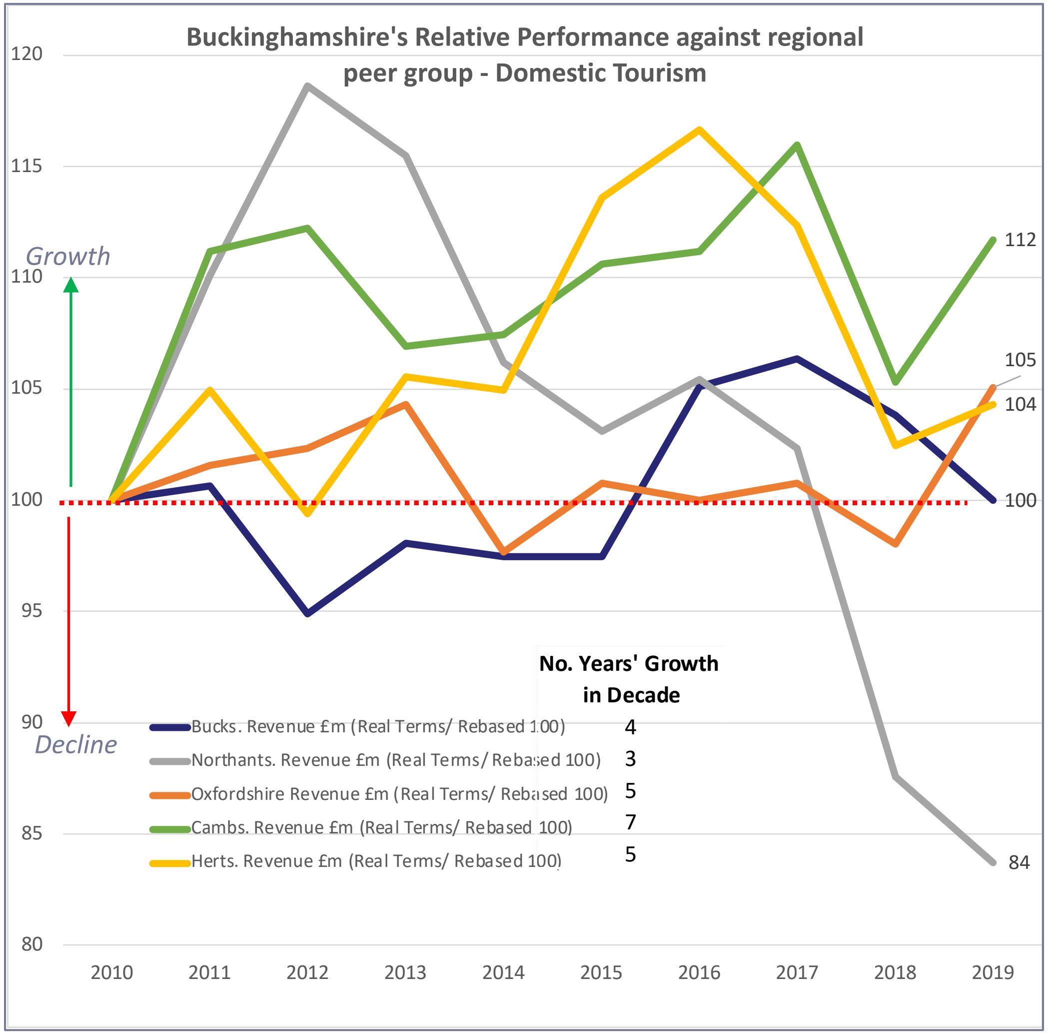
3. Next Steps (Cllr Rachael Matthews)

The Strategy so far

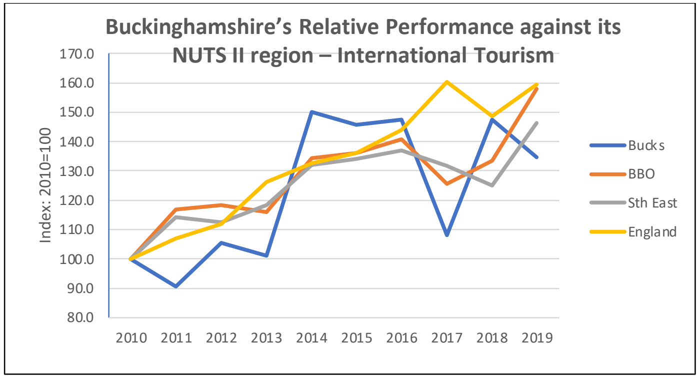
Project Stages

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

The Challenge – A Lost Decade

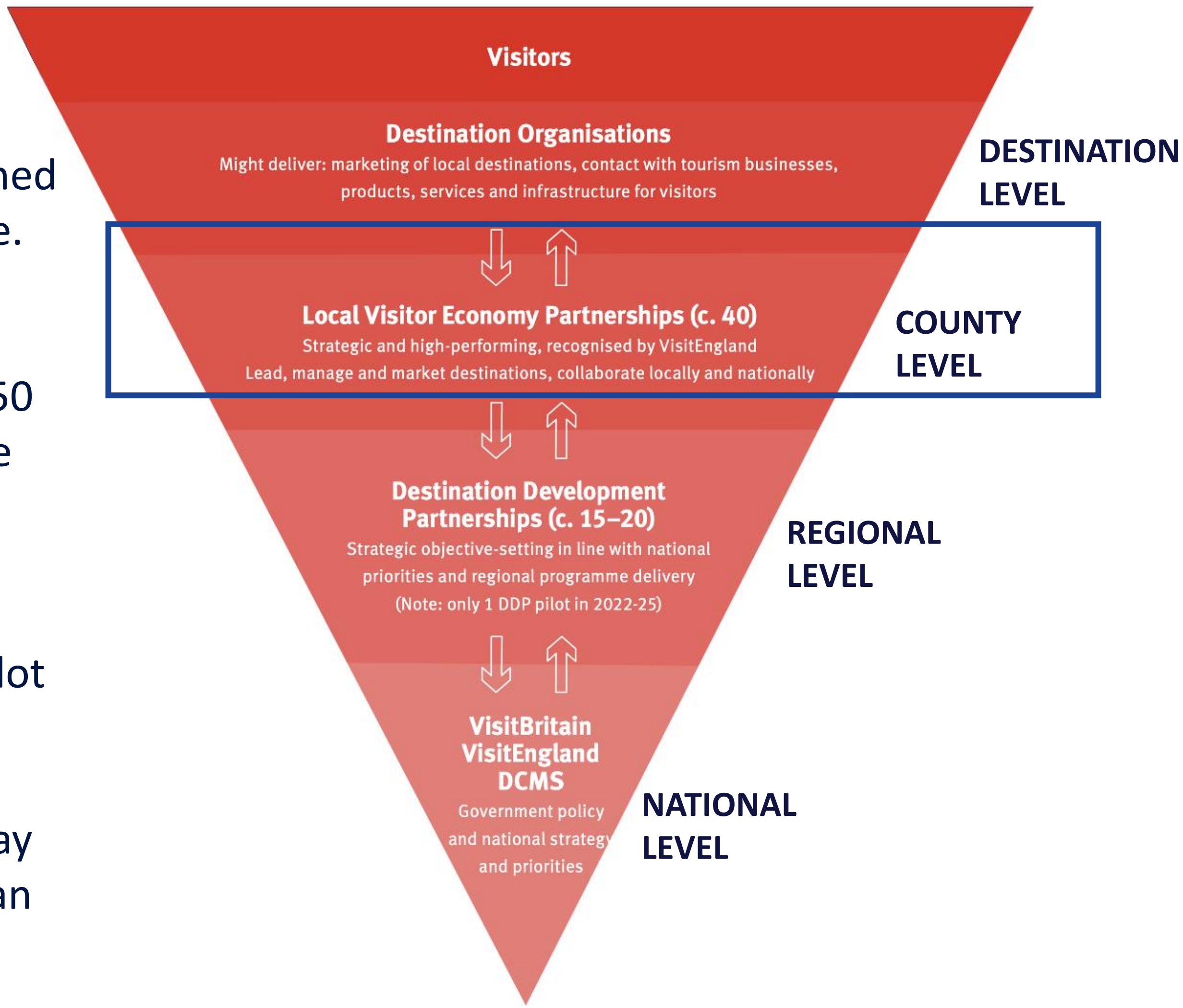


- The key issue for the County is that the Visitor Economy has shown no real-terms growth over the last decade. Only Northamptonshire has performed worse amongst this peer group, possibly reflecting issues with its wider governance.
- Domestic tourism (shown in the chart on the left) is the driver in 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

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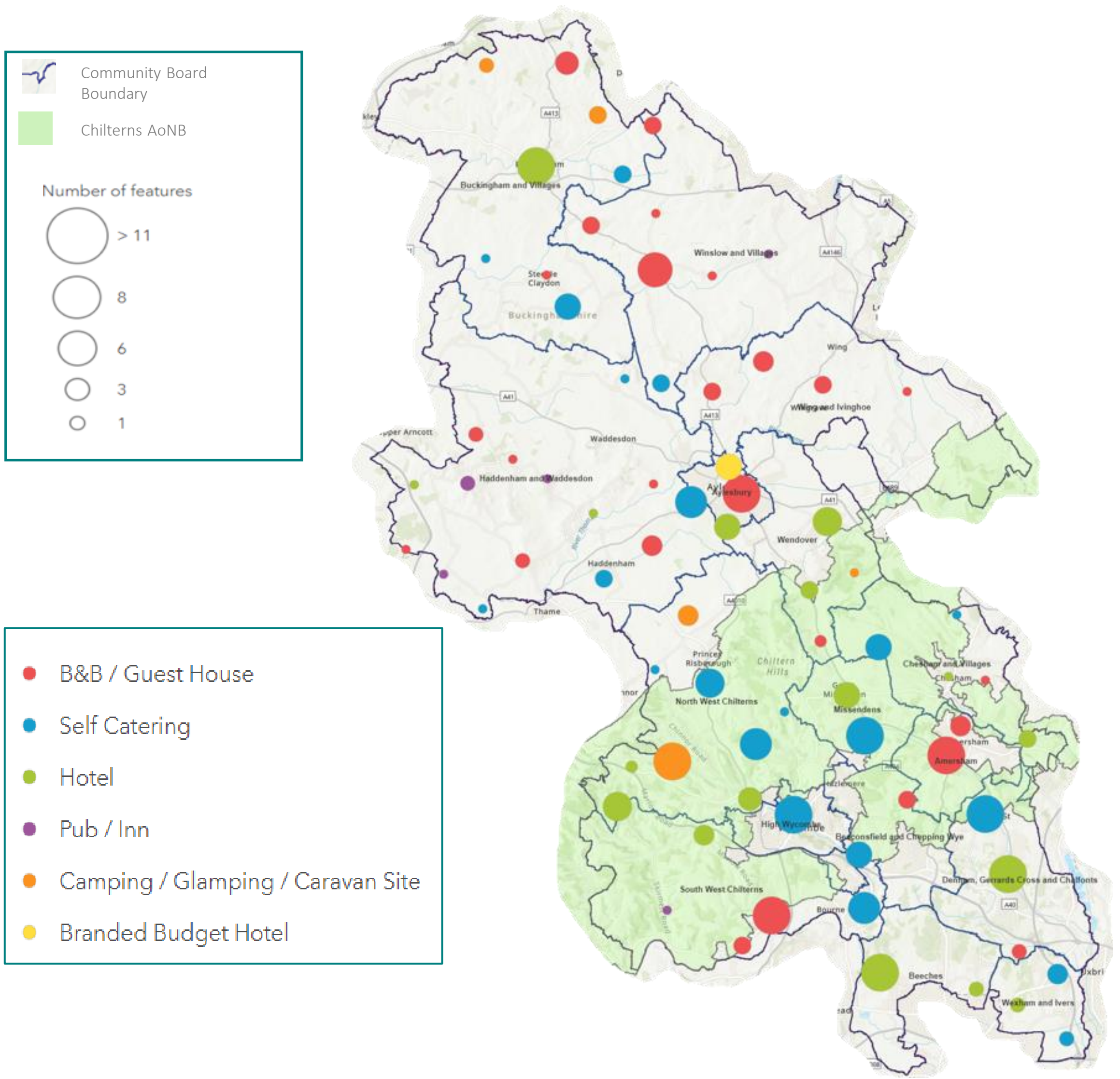
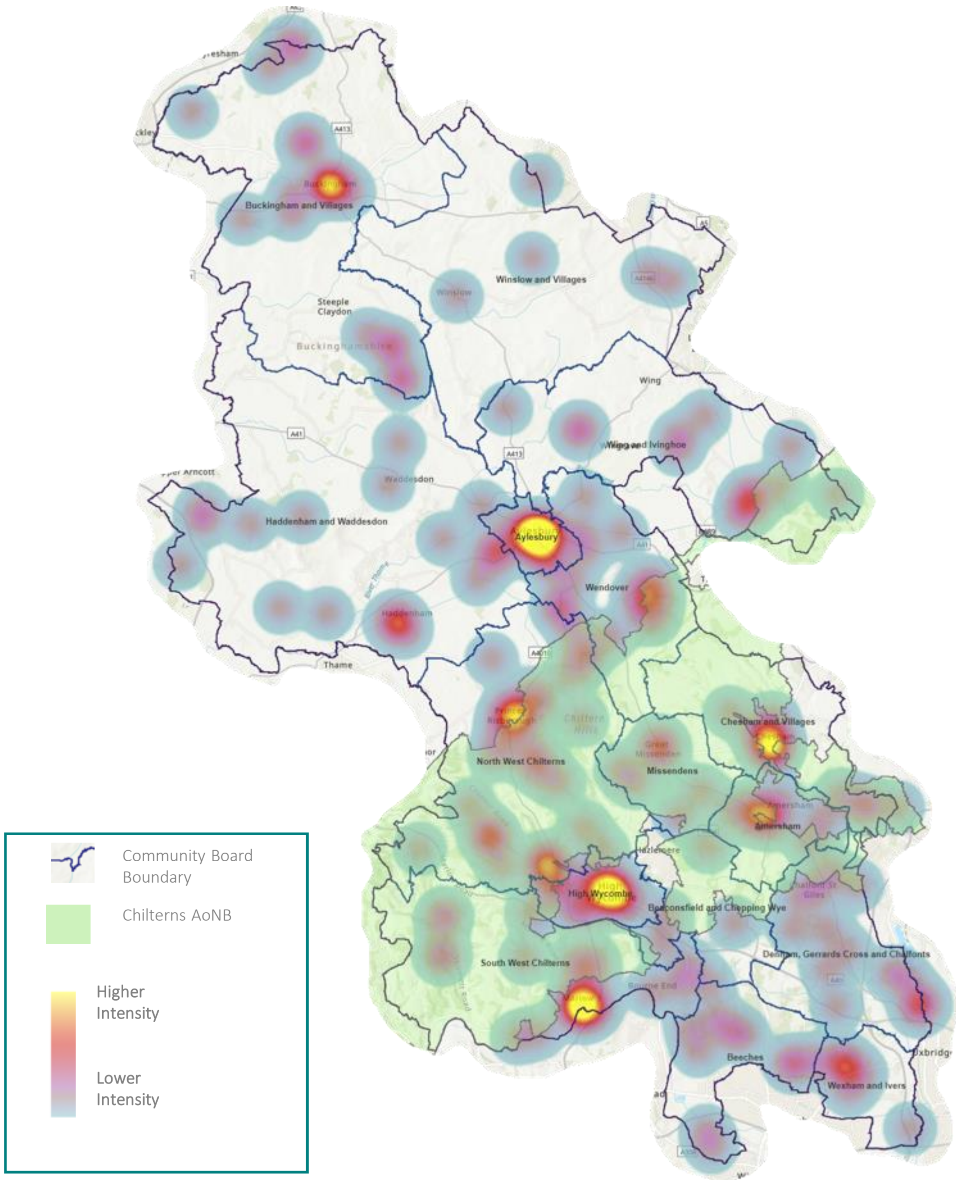


Buckinghamshire Visitor Attractions – Heat Map

Attractions

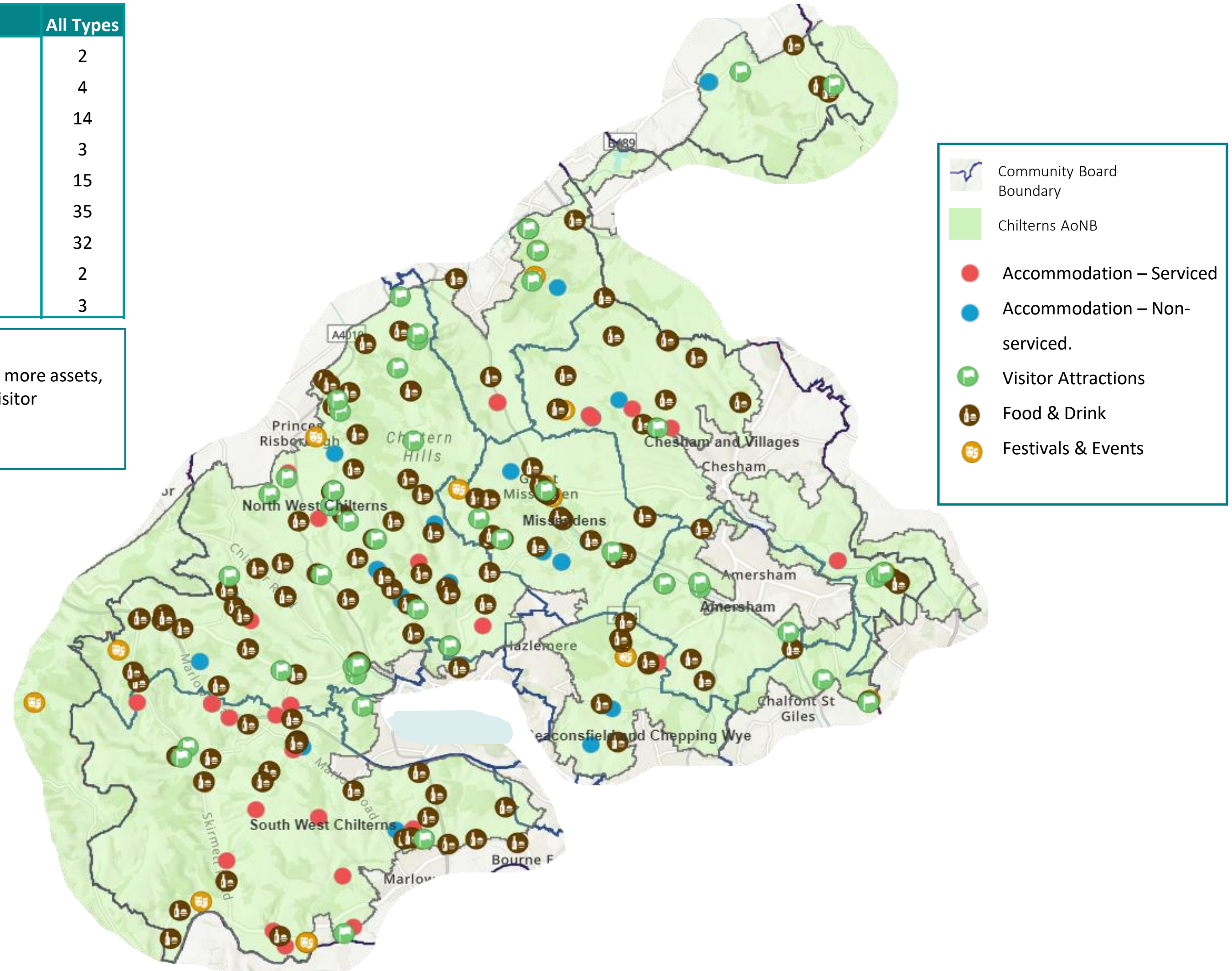
The main distribution of attractions is towards the south and west of the county. This is a relatively ‘traditional’ asset base comprising numerous historic properties and museums more suitable for older markets.



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

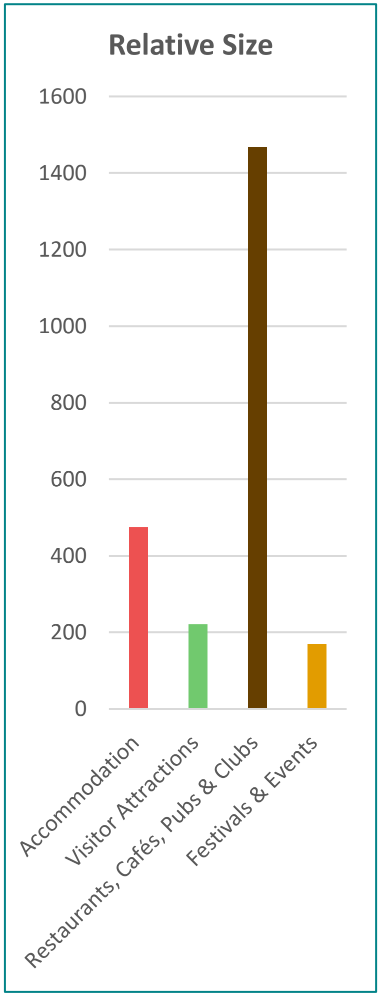
Notes:
1. Some establishments have two or more assets, typically a pub serving food or a visitor attraction with a café.
2. Events relate to 2022/23



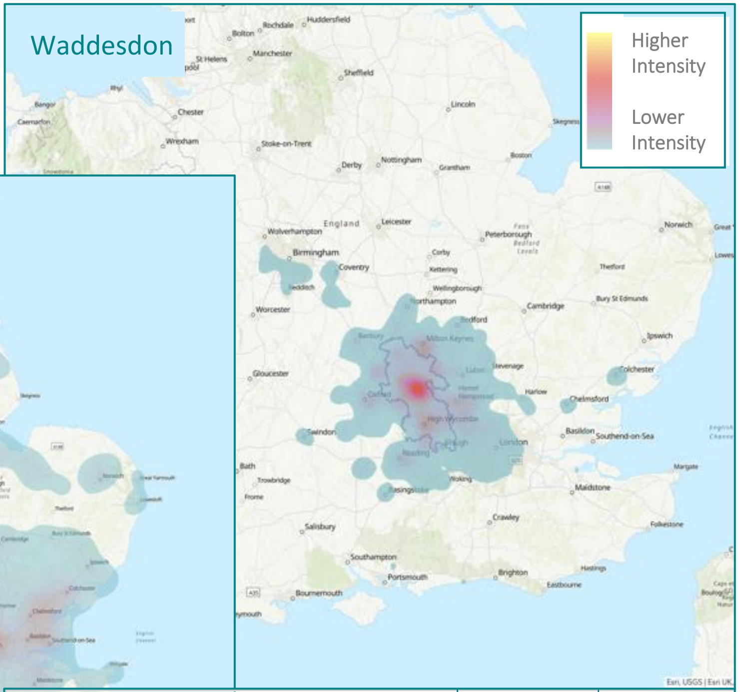
Total # Assets In the Chilterns

Total Stock

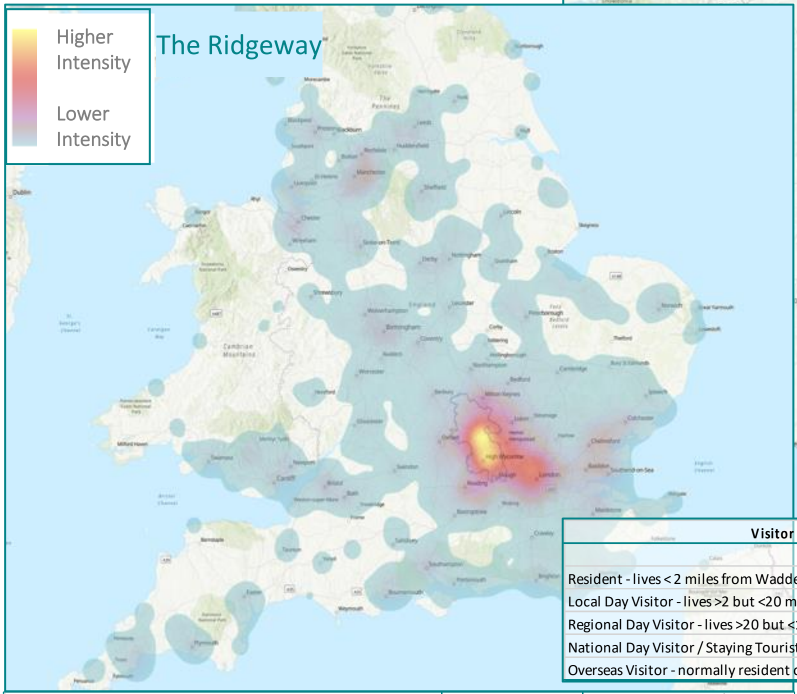
Table 1 Assets	Accommodation		Visitor Attractions		Restaurants, Café's, Pubs & Clubs		Festivals & Events	
Community Board	**Nos.**	**%**	**Nos.**	**%**	**Nos.**	**%**	**Nos.**	**%**
Amersham	17	4%	11	5%	77	5%	16	9%
Aylesbury	33	7%	20	9%	182	12%	14	8%
Beaconsfield and Chepping Wye	19	4%	3	1%	107	7%	2	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

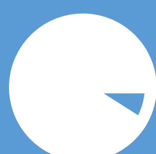
- 734 respondents
  - 20% Businesses
  - 73% Residents
    - 55% live in a town, 35% in a village, 8% in a rural area
    - 59% are employed, 11% are self employed, 14% are volunteering
    - With a score of 4.6 out of 5, the environmental benefits of visitors are rated as the most important to residents
    - 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

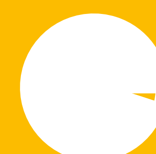
7.9%

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.