OXFORDSHIRE VISITOR ECONOMY VISION & DESTINATION MANAGEMENT PLAN BASELINE REPORT

REPORT FOR THE DMP STEERING GROUP/OXLEP

SEPTEMBER 2023

CONTENTS

1 SUMMARY FINDINGS

This document is a technical appendix to the Vision and Destination Management Plan. It provides a summary of the findings from the desk based analysis and early stages of the project.

The following SWOT provides a useful summary that brings together the emerging insights:

STRENGTHS	WEAKNESSES
▶ Strong and internationally recognisable brands in Oxford and the Cotswolds with identifiable experiences e.g. Oxford University and Blenheim Palace ▶ Robust visitor numbers and 32,000 jobs in tourism (2019) ▶ Proximity to London and large source markets (domestic and international) ▶ High in league table for inbound (international) visitors ▶ High quality marketing activity ▶ Ageing demographics with high disposable income ▶ Policy support for tourism development and residents get importance of tourism ▶ Strong thematic experiences (Heritage, History, Culture, Gardens and Countryside, Waterways) ▶ Strong demand for visitor accommodation	▶ Geographic/administrative boundaries drive activity rather than visitor destination marketing ▶ Oxfordshire not seen as the destination and City/County visitor experience disconnect ▶ Bottom half of league table for domestic holidays and business visits ▶ Uneven distribution of visits across the districts and limited public transport options – ease of access and getting around ▶ Fewer major events than competing destinations ▶ Visitor satisfaction levels lower in some areas (transport and retail) ▶ Lack of focus on ‘destination management’ and resulting issues e.g. visitor welcome ▶ Oxford city receives lower numbers of older visitors despite appeal ▶ Residents unhappy about tourism issues (congestion, environment) and concerns of quality of public realm and welcome

OPPORTUNITIES	THREATS
▶ Expanding strong themes (Film, Wellbeing, Food and Drink) ▶ Increased working with/ through travel trade and packaging ▶ Business tourism (joining up knowledge economy with association conferences) and providing suitable facilities ▶ Plug gaps (off-peak months and Sundays) ▶ Local Visitor Economy Partnership status and activity ▶ Joining up experiences (City, Cotswolds, Thames Valley) ▶ Outdoor active trends for countryside areas ▶ Partnership and collaboration to 'grow the tourism cake' ▶ Additional accommodation stock (staying visitors = 12% visits and 48% spend) ▶ Strong pipeline projects and investor confidence ▶ Make more of market towns and villages (countryside and city) to spread benefits ▶ Signature events to influence visits (esp. off-peak) ▶ New funding sources e.g. an Accommodation Business Improvement District which would administer a nominal levy on overnight stays in paid accommodation establishments	▶ Delayed recovery from some international markets ▶ Business resilience (post-covid) and increased operating costs (attractions 22% down in 2022 v 2019) ▶ Cost of living crisis and visitors spending less ▶ Sustainability and responsibility balanced with growth ▶ Businesses not engaging with travel trade ▶ Workforce development and labour supply

2 STRATEGY AND POLICY CONTEXT

KEY POINTS

- There is a comprehensive and supportive strategic & policy environment for the visitor economy in Oxfordshire.
- National policies/strategies emphasise the importance of the tourism sector, with a focus on sector recovery, growth, productivity and dispersal of value across the UK.
- County and district plans/strategies highlight Oxfordshire's existing strengths as a visitor destination, the value of the tourism sector to the local economy, opportunities for sustainable growth and the need to maximise geographical and seasonal spread of visits.
- National, county and local strategies/plans in this section are:

National strategies/plans	UK Industrial Strategy: Tourism Sector Deal 2019, UK Government Build Back Better: our plan for growth, HM Treasury, March 2021 Visit Britain/Visit England Strategy 2020 - 2025 DCMS Tourism Recovery Plan, June 2021 & Update on Delivery, March 2023
County	Oxfordshire Local Industrial Strategy, July 2019, OxLEP Oxfordshire Strategic Economic Plan, 2016 OxLEP Creative, Cultural, Heritage and Tourism Strategy, OxLEP Oxfordshire's Economic Recovery Plan: The ERP Action Plan 2021, OxLEP Visitor Economy Renaissance Programme, OxLEP Oxfordshire County Council Strategic Plan, 2022 – 2025 Oxfordshire Strategic Vision 2022, Future Oxfordshire Partnership Ambition Statement 2019, Experience Oxfordshire Cotswolds Tourism Destination Management Plan 2022 – 2025

District & City	Adopted Oxford Local Plan 2016 – 2036, Oxford City Council Emerging Oxford Local Plan 2040, Oxford City Council Oxford's Economic Strategy 2022- 2023, Oxford City Council Oxford City Centre Action Plan 2021 – 2030, Oxford City Council South Oxfordshire Adopted Local Plan 2011 – 2035 West Oxfordshire Local Plan 2011 – 2031 Adopted Cherwell Local Plan 2011 – 2031 Vale of White Horse Local Plan 2031

NATIONAL STRATEGIES/PLANS

UK Industrial Strategy: Tourism Sector Deal 2019, UK Government

The Tourism Sector Deal sets out how the government and industry will work in partnership to boost productivity, develop the skills of the UK workforce and support destinations to enhance their visitor offer.

Build Back Better: our plan for growth, HM Treasury, March 2021

'Build Back Better: our plan for growth' sets out the government's plans to support growth through significant investment in infrastructure, skills and innovation, and to pursue growth that levels up every part of the UK, enables the transition to net zero, and supports the vision for Global Britain. The plan supersedes the government's 2017 Industrial Strategy.

Visit Britain/Visit England Strategy 2020 - 2025

Tourism in Britain contributes 9% of GDP and accounts for 10% of all jobs. It has been recognised as a leading sector in the Government's future economic planning, with the granting of a Tourism Sector Deal as part of its Industrial Strategy. The Visit Britain/Visit England Strategy sets out how it will support the delivery of the Tourism Sector Deal. The mission 'to make tourism one of the most successful and productive sectors for the UK economy' will be achieved by:

Growing value
Through stepping up our domestic marketing activity, we will address the balance of trade deficit and encourage more people to holiday at home. We will focus on younger customers (aged 18-34), whose domestic tourism activity is in decline, and families, who are both essential for the long-term growth of the industry. Through developing our customer segments for the domestic market, we will ensure we reach the right customers with the right content. Through our work in the delivery of the Tourism Sector Deal, we will support Government's ambition to make the UK the most accessible destination in Europe.

Driving the dispersal of tourism value across Britain
Working in partnership with Destination Management Organisations (DMOs), we will grow visits and value of our leisure and business travel across England. This will be supported by the development of regional product that addresses domestic and international market gaps and address product gaps through the distribution platform Tourism Exchange Great Britain (TXGB). In addition, we will build our partnerships and expertise in route development to grow connectivity to regional England. Through our work on the delivery of the Tourism Sector Deal we will identify new Tourism Zones, supported by central Government, and a biddable funding process, to drive visitor numbers across the country, extend the season and to tackle local barriers to tourism growth.

Supporting productivity optimisation
Our priority will be to support the development of the England product, this will extend the season for an international and domestic audience and enable the distribution of this product in international markets building on the success of the Discover England Fund. By helping the industry build digital skills, we will ensure that product is researchable and bookable online. Our focus on winning business events for England will see us work closely with venues and locations and matching them with international opportunities, providing them with platforms to meet international buyers and supporting them through the bidding process.

Being the expert body on growing tourism
We will ensure that VisitEngland is seen as a trusted partner in delivering on the Government agenda and provide and distribute statutory research, data and analysis that informs our own, industry and Government decision-making. Supporting and working together with DMOs and the wider England industry our assets, market plans and intelligence will be shared for national benefit. We will also provide platforms and events that enable us to share best practice and celebrate business excellence across English tourism.

Our customers

Our global segments, nuanced by markets, are:

- Buzzseekers – younger, free-spirited and spontaneous, they like holidays full of action and excitement
- Explorers – older, they enjoy the outdoors, sightseeing and embracing local culture at a more relaxed pace
- Culture buffs – image and brand-conscious, travel is seen as a status symbol; they like well-known safe destinations
- Free and easy mini-breakers – similar to buzzseekers, this younger domestic audience love the opportunity to take short breaks where they can either let loose or unwind

Our markets

UK Domestic

Drive regional and seasonal dispersal increasing volume and value of short breaks in the shoulder season. Increase focus from one to two target audiences to address long term growth and short-term opportunity.

Overseas

Our most beneficial overseas market by some distance, and the market showing the most profitable growth, is the USA, followed by value growth from China. These are two of our markets that we uplift investment in using the GREAT funds – we add to that Australia, France, Germany, GCC, India and UK. Our secondary markets for value include the rest of Europe, Canada, Brazil and South Korea. Lower growth (among our core markets) is projected from Hong Kong, Japan, Russia and Austria. For each market we have developed and refined a market strategy that focuses on the best prospects for driving tourism growth.

DCMS Tourism Recovery Plan, June 2021

In June 2021, the UK government published the Tourism Recovery Plan in response to the significant impact that the COVID-19 pandemic had wrought on the sector. The Tourism Recovery Plan outlined the following six objectives:

For the short to medium term, to:

- recover domestic overnight trip volume and spend to 2019 levels by the end of 2022, and inbound visitor numbers and spend by the end of 2023 – both at least a year faster than independent forecasts.

And for the medium to long term, to:

- ensure that the sector's recovery benefits every nation and region, with visitors staying longer, growing accommodation occupancy rates in the off-season and high levels of investment in tourism products and transport infrastructure;
- build back better with a more productive, innovative and resilient industry, maximising the potential for technology and data to enhance the visitor experience and employing more UK nationals in year-round quality jobs;
- ensure the tourism industry contributes to the enhancement and conservation of the country's cultural, natural and historic heritage and minimises damage to the environment;
- ensure the tourism industry provides an inclusive offer that is open to all, aiming for the UK to become the most accessible tourism destination in Europe by 2025;
- make the UK a leading European nation for hosting business events.

In March 2023, DCMS released an Update on Delivery. Updates have been provided against each of the six objectives.

Objective 1: To swiftly recover pre-pandemic levels of domestic and international visitor volume and spend.

The picture of recovery is a mixed one. Domestic visitor numbers appear to have recovered up to or close to 2019 levels. However, international visitor numbers and spending remain below 2019 levels. The government's aim is now to recover 2019 levels of inbound visitors and spend by the end of 2024.

Objective 2: To ensure that tourism benefits every nation and region

In addition to a series of investment and funding initiatives, the government is taking steps to support regional tourism by taking forward the recommendations from the Nick de Bois Review of Destination Management Organisations (DMOs), with the aim of supporting regional areas to better attract and manage tourists. The de Bois Review was launched by the government in 2021, in recognition of the impact of COVID-19 and of '*the important role DMOs play in supporting and driving English tourism locally, regionally and nationally. They also have a role to play in creating, growing and retaining domestic and international business events and in providing a warm UK welcome to delegates whilst here.*'

This includes the renaming of DMOs as Local Visitor Economy Partnerships (LVEPs), the introduction of a new accreditation system for LVEPs, and the pilot of a multi-year core funding model, the Destination Development Partnership, in the North East. The Levelling Up White Paper, published in February 2022, set out how the government will spread opportunity more equally across the UK, including through the introduction of Devolution Deals which present an opportunity to further unlock the potential of local and regional tourism.

The Tourism Recovery Plan is the government's strategic framework for supporting and working with the tourism sector and the government will continue to revisit the six Recovery Plan objectives at regular intervals to ensure that the right policy interventions are in place to support the sector.

OXFORDSHIRE STRATEGIES/PLANS

Oxfordshire Local Industrial Strategy, July 2019, OxLEP

The ambition for the Oxfordshire Local Industrial Strategy is: *to position the county as one of the top three global innovation eco systems, highlighting our world-leading science and technology cluster and to be a pioneer for the UK and our emerging transformative technologies and sectors.* The Strategy is based on a partnership between representatives of the county's businesses, universities, education bodies, local authorities and the government. The framework is grouped around the five foundations of productivity:

- Ideas: establish a globally connected innovation economy.
- People: develop a more responsive skill system creating better opportunities for all.
- Infrastructure: enable greater connectivity and accessibility especially across key growth locations.
- Business environment: become a powerhouse for commercialising transformative technologies.
- Places: develop Oxfordshire as a living laboratory to help solve the UK's grand challenges.

Under the 'Places' foundation, the Strategy states:

Oxfordshire is a global destination with international reach. It is increasingly attractive to visitors across new markets, attracted to Oxfordshire by its considerable tourist offer including the City of Oxford, Bicester Village, the Cotswolds and Blenheim Palace. In 2017, the county welcomed nearly 30 million visitors, with many of these from international locations. The tourism and hospitality industry supports 10 per cent of all employment in Oxfordshire, contributing £2.17bn to the economy. Increased investment in areas such as high-grade hotel stock and international conferencing facilities could boost this offer, complement Oxfordshire's global brand, and create more accessible, permanent jobs for the wider community.

Oxfordshire Strategic Economic Plan 2016 (SEP), OxLEP

Oxfordshire's Strategic Economic Vision to 2030 is: *By 2030 Oxfordshire will be recognised as a vibrant, sustainable, inclusive, world leading economy, driven by innovation, enterprise and research excellence.*

The four key themes are:

- Innovative Enterprise: Encourage innovation led growth, underpinned by Oxfordshire's strengths in University research and development, business collaboration and supply chain potential
- Innovative People -Deliver and attract specialist and flexible skills at all levels, across all sectors, as required by our businesses, with full, inclusive employment and fulfilling jobs
- Innovative Place - Provide the quality environment and choice of homes needed to support growth and capitalise upon the exceptional quality of life, vibrant economy and the dynamic urban and rural communities of our county
- Innovative Connectivity - Allow people to move freely, connect easily and provide the services, environment and facilities needed by a dynamic, growing and dispersed economy

Under the 'Place' theme, one of Oxfordshire's strengths is stated as: *a major tourist destination with a growing visitor and cultural economy*. One of the opportunities is to be: *a globally renowned visitor and cultural economy.*

The SEP prioritises interventions in key locations, specifically along the 'Oxfordshire Knowledge Spine'. The Knowledge Spine runs through the centre of the county with the three key areas for growth potential in population, employment and housing at Bicester, Oxford City and Science Vale Oxford.

Note: The revised, updated SEP is currently in draft and under review.

Creative, Cultural, Heritage and Tourism Investment Plan (CCHTIP), OxLEP

This Investment Plan set out a new growth agenda, in line with the ambition outlined in the 2016 SEP. The Plan states: *The creative industries and tourism have an opportunity to play an important role here in generating jobs and contributing to innovation and competitiveness across the economy. But this will only happen if better use is made of the cultural and heritage assets, for the jobs they generate but also for the added value they create by enhancing the quality of places, improving their appeal, and helping to ensure growth is sustainable, inclusive and sensitive to our distinctive sense of place.*

Four thematic areas identified to help deliver the growth goals of the SEP are:

- Productive and Engaging Experiences
- Skills, talent development and business growth
- Creative place-making
- Collaboration – a cross-cutting theme

Under the section, 'Growing the Tourism Economy in Oxfordshire: Harnessing the Wealth of Creative, Cultural and Heritage Assets', the Plan stated:

A significant proportion of growth potential in the visitor economy lies in the overseas market, so Oxfordshire needs to attract more international visitors to stay longer and spend more. However key areas to support this growth will involve investment in new accommodation particularly 5-star hotels to support the luxury market, and a hotel development with 300-400 bedrooms to attract the corporate market that could potentially host large conferences in one location. The county currently lacks capacity to meet demand which limits the opportunities for visitors to explore, stay and experience more of what Oxfordshire has to offer.

The Plan included 35 investment proposals, provided under the four themes.

Oxford Economic Recovery Plan: The ERP Action Plan, 2021, OxLEP

This ERP Action Plan provided a route map for recovery from COVID-19. The timeframe was from Spring 2021 to Spring 2023. Actions were set out across three themes: People, Business, Places. A key additional enabler across these themes was Connectivity. For each of the three themes there were four 'action streams' which together provided the recovery response. These were: Action Stream 1: Existing Activities; Action Stream 2: Response Measures; Action Stream 3: Oxfordshire Investment Plan 'early wins'; Action Stream 4: Target Proposals. Visitor Economy Renaissance was one of the Target Proposals.

Visitor Economy Renaissance Programme (VERP), OxLEP

OxLEP is leading a £1.64 million programme of activity to assist the recovery of Oxfordshire's visitor economy. The programme links directly to the Oxfordshire Covid 19 Economic Recovery Plan (ERP). With key elements of the programme delivered in partnership with Experience Oxfordshire and Cotswolds Plus, the aim of the VERP is to *'attract visitors and ensure that Oxford and Oxfordshire maintains its position as one of the UK's most desirable visitor destinations for local, national, and international visitors, with a focus on attracting value from all visitors and encouraging green and sustainable tourism and practices'.*

Oxfordshire County Council Strategic Plan 2022 - 2025

Oxfordshire County Council's vision is: working in Partnership to make Oxfordshire a greener, fairer and healthier county. The nine priorities are:

- Put action to address the climate emergency at the heart of our work.
- Tackle inequalities in Oxfordshire.
- Prioritise the health and wellbeing of residents.
- Support carers and the social care system.

- Invest in an inclusive, integrated and sustainable transport network.
- Preserve and improve access to nature and green spaces.
- Create opportunities for children and young people to reach their full potential.
- Play our part in a vibrant and participatory local democracy.
- Work with local businesses and partners for environmental, economic and social benefit.

Oxfordshire Strategic Vision, Future Oxfordshire Partnership 2022

The Future Oxfordshire Partnership which comprises the six councils and key strategic partners are working together to deliver a better future for the county. Its purpose is to deliver the bold aims of its strategic vision and it will:

- Coordinate local efforts to manage economic, housing and infrastructure development in a way that is inclusive and maximises local social and environmental benefits;
- Support the development of local planning policy that meets the UK Government's stated aim of net zero carbon by 2050, and contributes towards biodiversity gain whilst embracing the changes needed for a low carbon world; and,
- Seek to secure funding in the pursuit of these aims and oversee the delivery of related work programmes delegated to it by the joint committee's constituent local authority members.

The stated outcomes of the partnership are that by 2050:

- Our natural environment will be in a better state than that in which we found it
- We will already be carbon neutral and accelerating towards a carbon negative future
- Our residents will be healthier and happier, and overall wellbeing will have improved
- Our local economy will be globally competitive, sustainable, diverse and inclusive

- Our county will be a more equal, fair and inclusive place for everyone
- Our vibrant historic and cultural offer will be rich, diverse and enhanced
- We will have energy efficient and affordable homes in the right number, location and tenure
- Our county's connectivity will be transformed in ways that enhance wellbeing
- Our diverse and vibrant communities will thrive with a strong sense of identity

The vision is an ambitious pathway for long term change towards a more sustainable future and the partnership a way in which collaboration will hopefully unlock additional investment.

Ambition Statement, Experience Oxfordshire

Developed in 2019, but still highly relevant, the ambition statement clearly sets out how Experience Oxfordshire works in collaboration with partners and stakeholders to support the growth and development of the county's visitor economy.

Experience Oxfordshire's ambitions are to:

- Work with businesses and stakeholders to improve growth and productivity across the visitor economy; leading effective destination management, whilst ensuring that tourism works for everyone across Oxfordshire
- Encourage visits that offer the best balance of impact and contribution to the county
- Work to deliver a joint vision of pride in place across the city and county that engages with both residents and visitors to improve welcome and experience
- Spread the tourist season throughout the year to decrease the impact of seasonality and to encourage visitors to explore the whole county
- Increase overnight stays from both international and domestic visitors ensuring an increased spend per visit

- Encourage and enable the exploration of cultural treasures across the county by local people
- Advocate for the importance of the sector and influence stakeholders to address issues that hinder productivity and growth and to encourage skills development and job creation
- Drive growth across the visitor economy by increasing the value of visitor expenditure by 5% year-on-year
- Encourage long term investment and support from the public and private sectors to ensure that the county has a sustainable DMO that can deliver our destination management ambitions and drive growth
- Grow the Experience Oxfordshire partnership and make it work for small and large businesses, offering a flexible value for money proposition
- Experience Oxfordshire will deliver this by seeking investment from Partners and stakeholders and providing a range of services for Partners. The organisation prides itself in being a partnership where every business has a place and everyone can benefit

Cotswolds Tourism Destination Management Plan 2022 - 25

The Vision for Tourism in the Cotswolds is:

To ensure that the Cotswolds is a vibrant year-round destination where visitors enjoy high quality, authentic experiences and tourism makes an increasing contribution to the economic, social and environmental sustainability of the local economy.

34 detailed objectives are provided under the following 6 headings:

- Sustainability: objectives are provided around transport, business practices, local supply chains, information provision, participation in the Caring for the Cotswolds payback scheme, geographical and seasonal spread, promotion of active travel.
- Partnership: tourism partnerships, supporting businesses and organisations, identifying funding opportunities, effective partnership mechanisms with wider visitor economy stakeholders.
- Product – enhancing the visitor experience: developing a sense of place, advocacy for investment and improvements to the wider destination infrastructure, ensuring high quality service, maximising visitor distribution, developing new experiences, visitor information.

- Marketing: strengthen the Cotswolds brand, new technologies, innovative marketing plans, new opportunities for year-round products, events and activities, visitor distribution, showcase new products and developments to counter potential misconceptions of the Cotswolds.
- Knowledge and data: annual economic impact studies, develop systems for monitoring visitor satisfaction, marketing effectiveness and business performance, tracking footfall and trends, analysis of cotswolds.com and social media channels, track local business activity and sentiment.
- Performance – building excellence through networking and collaboration: increase B2B connections encouraging greater use of local produce and suppliers, offer opportunities for B2B communication and sharing of best practice, encourage sustainable business practices, provide regular business updates, support businesses' use of new technologies and improve their online presence.

DISTRICT/CITY STRATEGIES/PLANS

Adopted Oxford Local Plan 2016 - 2036, Oxford City Council

The Adopted Oxford Local Plan states 'We want Oxford in 2036 to be':

- A centre for learning, knowledge and innovation
- A prosperous city with opportunities for all
- An environmentally sustainable city
- An enjoyable city to live in and visit
- A strong community
- A healthy place

'Ensuring Oxford is a vibrant and enjoyable city to live in and visit' is examined in Chapter 8, leading to Policy V5: Sustainable Tourism. The Plan comments that tourism is an important element of Oxford's economy, attracting large numbers of tourists. However, with this success comes challenges for the infrastructure and management of the city. A large number of tourists make very short visits (day/part-day), generating only slight economic benefits but significant impact on the city. Many arrive on coaches, adding to congestion pressures.

Policy V5 Sustainable Tourism:

Planning permission will only be granted for the development of new sites for holiday and other short stay accommodation in the following locations: in the City Centre, in District Centres, on sites allocated for that purpose, and on Oxford's main arterial roads where there is frequent and direct public transport to the city centre. This locational requirement does not apply to proposals to refurbish or expand existing sites.

Premises that seek to be refurbished and/or expanded are supported in principle, provided that any adverse environmental impacts including traffic are properly managed. The policy also seeks to protect the existing supply of short-stay accommodation to ensure that a diverse range of facilities are retained, unless lack of viability is proven.

Planning permission for new tourist attractions will be supported subject to a number of criteria including ease of access (by walking, cycling or public transport); environmental and traffic impacts; relationship to existing/proposed tourist and leisure related areas.

Policy V6 Cultural and social activities:

Planning permission will be granted for proposals which add to the cultural and social scene of the city within the city and district centres provided the use is appropriate to the scale and function of the centre.

Proposals for cultural, entertainment, leisure and tourism (not accommodation) are subject to a number of criteria including around accessibility; environmental, traffic and residential impact; cumulative impact in relation to other similar uses; and policies V1 and V2 (Ensuring the vitality of centres and Shopping frontages in the city centre).

Emerging Oxford Local Plan 2040, Oxford City Council

The Emerging Oxford Local Plan 2040 states as its vision:

In 2040, Oxford will be a healthy and inclusive city, with strong communities that benefit from equal opportunities for everyone, not only in access to housing, but to nature, to jobs, to social and leisure opportunities and to healthcare. We will be a city with a strong cultural identity, that respects our heritage, whilst maximising opportunities to look forwards, to innovate, learn and enable businesses to prosper. The city will be supported to continue to make advancements in the life sciences and low carbon sectors, helping provide solutions to global crises. The environment will be central to everything we do; it will be more biodiverse, better connected and resilient. We will utilise resources prudently whilst mitigating our impacts on the soil, water and air. The city will be net zero carbon, whilst our communities, buildings and infrastructure will be more resilient to the impacts of future climate change or other emergencies.

The six themes of the Local Plan are:

- Society: a healthy, inclusive city to live in
- Environment: a green, biodiverse city that is resilient to climate change
- Economy: a prosperous city with a globally important role in learning, knowledge and innovation
- Societal/Economy: a more equal and inclusive city with strong communities and opportunities for all
- Societal/Environment: a city of culture that respects its heritage and fosters design of the highest quality

Future emerging policies as set out in the Preferred Options document and subject to recent public consultation responses, confirm that the new policies will seek to plan for future growth in the short-stay accommodation sector, but with an even greater recognition of the need to support a sustainable approach to tourism. This will be informed by the recent Oxford Hotel Report (Hotel and Short Stay Accommodation Study for Oxford, Bridget Baker Consulting Ltd) which highlights how the sector has changed and the new emerging issues that need to be addressed. New, short-stay accommodation will be directed to the most sustainable locations, being the City and District centres, together with the main arterial roads and on allocated sites. The expansion of existing short-stay accommodation will be supported in principle, subject to criteria which includes its location, together with the need to ensure that its impacts on neighbouring properties is minimised. The existing stock of short-stay accommodation will continue to be protected but based on the size of the premises, with the aim of safeguarding those of 10 bedrooms and above from being converted to other uses.

Oxford's Economic Strategy 2022- 2023, Oxford City Council

*Oxford's Economic Strategy seeks to establish a new standard for economic **inclusion** in the city. This will be underpinned by the strength of an impactful **global** city economy, evolving in a way which recognises environmental limits and harnesses the opportunity of a new **zero carbon** economy.*

Oxford's four priority sectors are Health and Life Sciences, Technology and Digital, Creative Production, Green and Low Carbon. The importance of the Visitor Economy is also recognised in '*helping us welcome the World to Oxford and further enhance our reputation for history and culture'.*

Examples of existing visitor economy assets:

- Heritage offer
- Cultural resonance and strong local offer (film, TV, literature, music and theatre)
- Access to waterways and green space city-wide and nearby Cotswolds

Future opportunities in and around Oxford:

- Support more systematic entry level jobs and career progression in the sector
- Create more hotel capacity for higher value overnight stays
- Drive innovation in sustainable tourism and support new attractions in-line with Local Plan

'Evolving Oxford's Visitor Economy' is one of three focus areas in the Delivery Plan. Six strategic principles to guide delivery are:

- Increase overnight stays from international and domestic visitors
- Enhance the tourism offer to encourage and enable exploration
- Spread the tourist season throughout the year to decrease the impact of seasonality
- Enhance tourism management to ensure visits achieve a balance between impact and economic contribution

- Support the tourism sector to recover from the impacts of Covid-19 and the recession
- Develop employment and skills pathways to support local careers

Action number 28 in the Strategy's Delivery Plan has the Guiding Principle: *Support the recovery of the visitor economy and seek benefits for visitors and residents.* Project/Activity is to 'Deliver the Focussed Visitor Economy Plan' including*:*

- Visitor Economy – Vision and Action Plan for Oxfordshire, 2022-24 and Visitor Economy Renaissance Programme 2022-24 with OxLEP and partners
- Continuing to build a commissioning relationship with Experience Oxfordshire, where resources allow, to support promotion, business support, and management of visitor economy, including coach parking and language schools
- Seek central Government support for the visitor economy as proposed in the Oxfordshire Industrial Strategy Investment Plan and Oxfordshire Economic Recovery Plan, which includes core funding for the DMO, promotion and marketing, skills development, business support and capacity building measures - Support the promotion of schemes like the Oxford Pass to encourage overnight stay
- Increase visitor accommodation by working with the LPA and landowners on strategic sites
- Deliver new Covered Market leasing and marketing strategy, alongside the development of a masterplan and investment strategy to create key city centre destination
- Explore with landowners, opportunities in the city centre for a new major cultural/ music venue (with conferencing facilities) in-line with local plan policies and allocations.

Oxford City Centre Action Plan 2021 - 2030, Oxford City Council

The City Centre Action Plan is collaboration between Oxford City Council and local stakeholders, with the objective of identifying a set of actions to strengthen the resilience of the city centre. The Plan focuses on four workstreams over the next eight years:

- Connectivity and Access – limiting private vehicles, reducing conflict and congestion and creating spaces for buses, bikes and people

- Public Realm and Animation – improving the look and feel of the city centre, providing events and experiences to bring it to life, so people want to stay longer
- Getting the mix right – building on Oxford's world class innovative and creative spirit, enhancing the city centre as a place to live, start and grow a business, visit and play
- Getting the basics right – creating an inclusive, safe and attractive city centre that promotes a diverse range of activities and uses.

The tourism proposals are:

Connectivity and Access

- A two-stage project to lessen the impact of visitor coaches on the city centre: (i) create additional temporary drop-off locations to ease the pressure on St Giles and work with coach operators and destinations to direct services to use the drop-off nearest their destination and to then move on to agreed layover sites; (ii) reduce the number of city centre drop-off locations, including exploring the potential to close the St Giles stop altogether, and replace them with edge of city facilities integrated with other transport options.

Getting the basics right

- Explore options for a new model of visitor information centre, including options for an improved digital welcome.
- Seek funding to continue the development and promotional work to switch from day and part-day visits to overnights stays.
- Conduct a survey of coach drivers and passengers on arrival in the city centre.
- Work with local partners to create and embed a guide protocol into language school operations.
- Explore funding to allow a review of existing city centre signage and recommend a cohesive, updated approach.
- Explore funding opportunities to enhance destination management and promote the Oxford offer.

Hotel & Short Stay Accommodation for Oxford, Oxford City Council/Bridget Baker 2023

The report provides an assessment of the hotel and short stay accommodation market in Oxford and is designed to inform the local plan. In terms of supply the study found that Oxford has a good supply of accommodation with 81 properties offering 3324 bedrooms. The report noted the absence of 'aparthotels' in Oxford.

Hotel performance against UK regional averages showed strong results for occupancy and ADR (achieved daily rate). Occupancy was almost 2% points higher than the average (2019) while ADR was almost 23% higher. The results were broadly similar however to comparable destinations (Cambridge, Bath & York).
The report noted the sector challenges associated with attracting staff, driven by low unemployment, competition for labour from other sectors, costs of housing and the availability of public transport (especially to coincide with early starts/late finishes).

It also estimated that Oxford had around 200 entire homes being marketed on short stay websites such as AirBnB.

Informing planning policy the report concluded that future hotel development should be focussed on:

- Headington (close to the John Radcliffe Hospital and Oxford Brooke's University)
- City Centre/West End/Osney Mead including the Oxpens site
- Northern Gateway/Oxford North
- District Centres/Arterial Roads

In summary the report found:

- Oxford has a good supply of accommodation but based on performance there will be a need for further accommodation development over the life of the Local Plan
- Support for directing development to the sites and locations identified above
- The need for accommodation to underpin the business travel requirements from emerging business and science parks with appropriate public transport connections

- A presumption to protect hotel and guest houses above a certain size with a presumption to permit change of use to residential for properties below a determined size.

South Oxfordshire Adopted Local Plan, 2011 - 2035, South Oxfordshire District Council

South Oxfordshire's vision for 2035 is: *South Oxfordshire will remain a beautiful and prosperous place to live. It will be an attractive place for people to work and spend their leisure time.*

Strategic Objectives are set out for: Settlements; Housing; Economy; Infrastructure; Design; Community; Natural and Built Environment; Climate Change. Objective 3.7 under 'Economy' states: *Encourage tourism by protecting our built and natural assets, such as the Thames, and providing services and facilities for visitors.*

Tourism-related policies within the Employment Policy list are:

- EMP 10: Development in Rural Areas. The council will ….

  iii) support sustainable rural tourism and leisure developments that benefit businesses, communities and visitors in rural areas and which respect the character of the countryside. This will include supporting the provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres;
- Policy EMP11: Tourism:

  1. The Council encourages new development to advance the visitor economy for leisure and business purposes. Proposals for such purposes will be supported as follows:
  i) within the built-up areas of the towns - larger scale developments including conference facilities, museums, heritage centres, hotels, guest houses and associated facilities for visitors;
  ii) within the built-up areas of the larger and smaller villages – smaller and proportionately scaled developments that are in keeping with the character of the settlement, including museums, heritage centres, hotels, guest houses, self-catering accommodation and associated facilities for visitors; and
  iii) at service areas on the main transport corridors - hotel accommodation.

2. Outside the above locations, small-scale development to support the visitor economy, including farm diversification and equine development, will be supported provided that proposals are in keeping with the scale and character of the locality and would not adversely affect heritage assets or their setting. Larger developments will only be supported in exceptional circumstances, for example to sensitively re-use a historic building, or to proportionally support or enhance enjoyment of a significant and established visitor attraction where this cannot reasonably be achieved from a town or village location.

- Policy EMP12: Caravan and Camping Sites
- Policy EMP13: Retention of Visitor Accommodation

West Oxfordshire Local Plan 2011 - 2031, West Oxfordshire District Council, Adopted September 2018

The Plan's core objectives are set out under five headings:

- Strong market towns and villages
- Meeting the specific housing needs of our communities
- Sustainable economic growth
- Sustainable communities with access to services and facilities
- Protecting and enhancing our environment and reducing the impact from climate change

Economic objectives include CO8: *to enable a prosperous and sustainable tourism economy.*

The Plan includes Policy E4 Sustainable Tourism, which states: *Tourism and leisure development which utilises and enriches the natural and built environment and existing attractions of West Oxfordshire to the benefit of visitors and local communities will be supported.*

Adopted Cherwell Local Plan, 2011 – 2031, Cherwell District Council

The Plan has three central themes:

- Policies for Developing a Sustainable Local Economy
- Policies for Building Sustainable Communities
- Policies for Ensuring Sustainable Development

The Vision for Cherwell District is: *By 2031, Cherwell District will be an area where all residents enjoy a good quality of life. It will be more prosperous than it is today. Those who live and work here will be happier, healthier and feel safer.*

Policy SLE 3: Supporting Tourism Growth states: *The Council will support proposals for new or improved tourist facilities in sustainable locations, where they accord with other policies in the plan, to increase overnight stays and visitor numbers within the District.*

Tourism also features in Policy ESD 16: The Oxford Canal: *We will protect and enhance the Oxford Canal corridor which passes south to north through the District as a green transport route, significant industrial heritage, tourism attraction and major leisure facility through the control of development. The length of the Oxford Canal through Cherwell District is a designated Conservation Area and proposals which would be detrimental to its character or appearance will not be permitted. The biodiversity value of the canal corridor will be protected. We will support proposals to promote transport, recreation, leisure and tourism related uses of the Canal where appropriate, as well as supporting enhancement of the canal's active role in mixed used development in urban settings. We will ensure that the towpath alongside the canal becomes an accessible long distance trail for all users, particularly for walkers, cyclists and horse riders where appropriate.*

Vale of White Horse Local Plan 2031

Four thematic areas central to the Local Plan are:

- Building healthy and sustainable communities
- Supporting economic prosperity

- Supporting sustainable transport and accessibility
- Protecting the environment and responding to climate change

Strategic Objectives include: SO 5: Support a strong and stable economy within the district, including the visitor economy.

District Wide Policies include: Core Policy 31: Development to Support the Visitor Economy – *the Council encourages new development to advance the visitor economy for leisure and business purposes…..*

In assessing key challenges and opportunities for the district, the Plan highlights ‘Promoting Tourism’, including:

- Increasing the economic impact and value of tourism by taking steps to convert day visitors to overnight visitors, in particular by addressing the shortage of hotel accommodation.
- Supporting growth in conferencing and business tourism stimulated by anticipated growth in the Enterprise Zone.

3 VISITOR DATA ANALYSIS

SCALE AND NATURE OF TOURISM IN OXFORDSHIRE

- Estimating the volume and value of the visitor economy in any jurisdiction can be tricky given the breadth of activity that can justifiably be said to fall within the bounds of tourism.
- The approach in this project has been to primarily rely on the national tourism surveys when painting a picture of tourism in the county ahead of the pandemic. While these surveys are certainly imperfect they do allow for a look at trends over time in a broadly consistent manner, and to compare the picture in one area with that of another. Where data is available at district level, we have shown differences in performance. However, where this is not possible, results are displayed at county level.
- To overcome the challenge presented by relatively small sample sizes many of the charts that follow are based on the annual average during the period 2017 to 2019. There is only limited data on the scale of day trips to the area by international visitors to the UK who are not overnighting within the county, with it assumed that their typical spend while on a day visit is akin to that for domestic residents undertaking what is called a Tourism Day Visit.
- The tourism bodies and local authorities also invest in Economic Impact Studies for their respective areas. These can produce different results as they model the economic impact using a number of inputs, including locally sourced business data. The difference between these results is most stark at the district level and care should be taken over how and where data is used.
- Based on the approach set out above the following chart suggests that the county was earning around £1.4bn per annum from tourism ahead of the pandemic, with half of this amount attributable to Tourism Day Visits by domestic residents, underscoring how vital this often overshadowed type of tourism is. This contrasts with the £1.95bn from the Oxfordshire economic impact study1 (£2.47bn after indirect/induced spend).

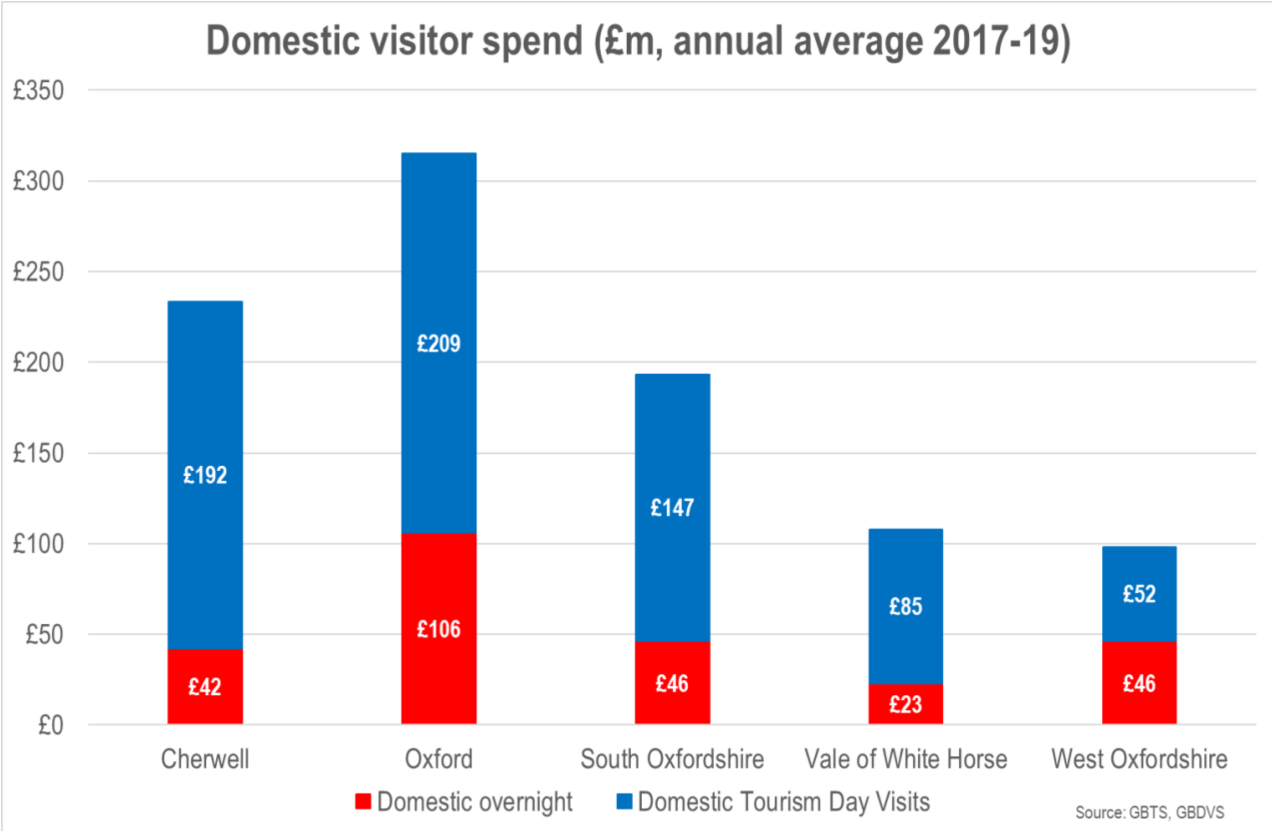
[1] Destination Research. Experience Oxfordshire Economic Impact of Tourism 2019.

Note that Tourism Day Visits is not a measure that reflects all leisure trips that are done and dusted within the space of a day. A Tourism Day Visit is a trip for leisure that lasts 3+ hours, is not taken very regularly and is to a place outwith the Local Authority within which the respondent lives.

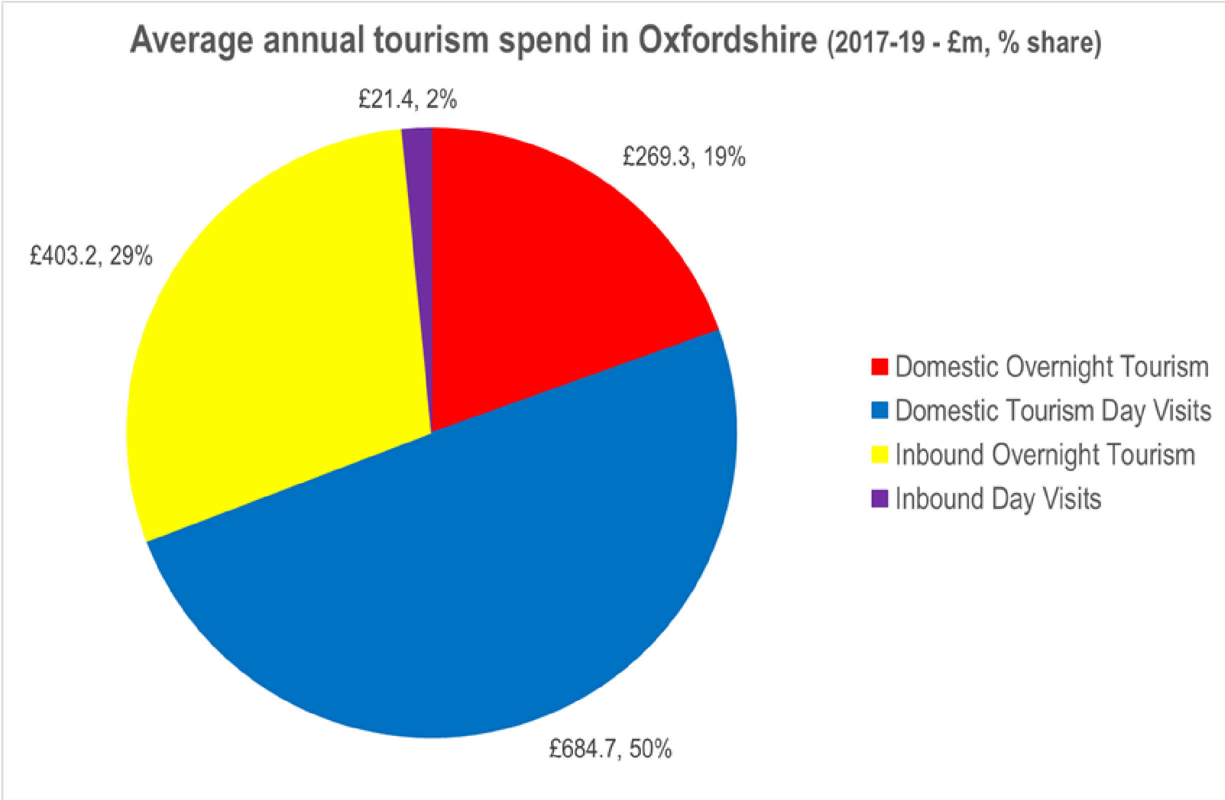
The reason for using Tourism Day Visits in this analysis is that these are the types of trips that are most likely to be influenced by the activities of those delivering tourism marketing activity. For comparison the value of Leisure Day Visits lasting 3+ hours (so removing the criteria for regularity and being outwith the respondent's own Local Authority) sees the value increase from £684.7m in the following pie chart to £865.9m. Were day trips for leisure lasting less than 3 hours, and business-related day trips also included the estimate would be higher still.

Focussing on domestic tourism spend by Local Authority we can note from the following chart that Oxford leads the way followed by Cherwell (where the Tourism Day Visits spend will likely reflect the presence of Bicester Village in the Local Authority). West Oxfordshire is the Local Authority where we see the closest equivalence between domestic overnight and domestic Tourism Day Visit spending.

However it is worth noting that the survey sample sizes, particularly in rural areas, can be quite low and this means results for areas like West Oxfordshire may underrepresent the true values achieved for tourism. Indeed West Oxfordshire's own economic impact study (2019) suggests domestic visitor spend is £204m.



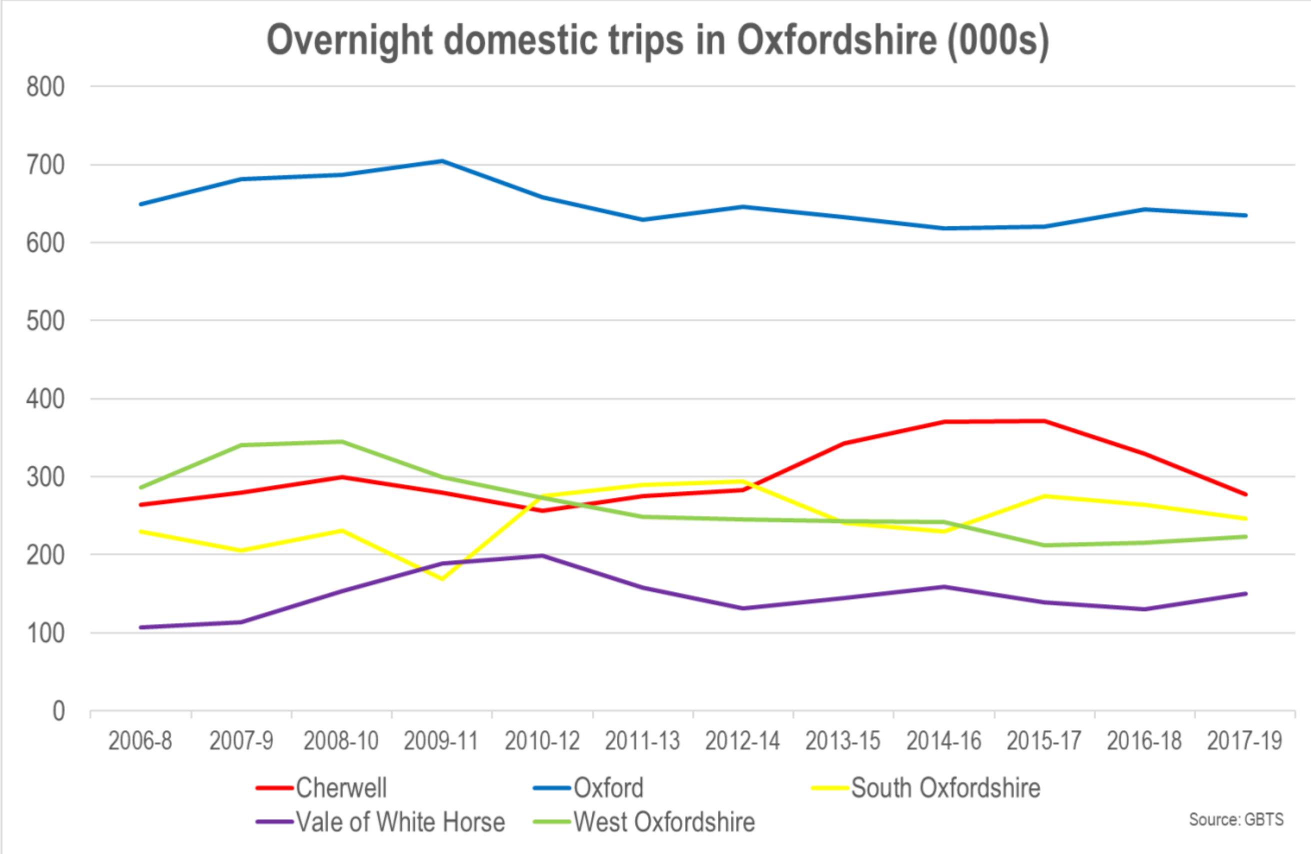
Overnight visits by inbound visitors generated 29% of annual spending while approximately one-fifth came courtesy of domestic overnight trips. The remaining 2% of spending is accounted for by inbound visitors who were just visiting the county on a day trip while spending their nights elsewhere.



OVERNIGHT DOMESTIC TOURISM

Looking at the trend in the number of overnight domestic visits in each of the five Local Authority areas within the county reveals that volumes remained fairly stable in the dozen or so years ahead of the pandemic, with Oxford itself always the district attracting the most visits and Vale of White Horse nearly always the district with the fewest visits. As one might expect by looking at the trend at the Local Authority level at the county level overall volumes have remained steady at around 1.6 million per annum. This flatlining in the volume of domestic overnight tourism closely mirrors the picture for England as a whole.

Again local economic impact studies will produce different results and they are shared at the end of this chapter.

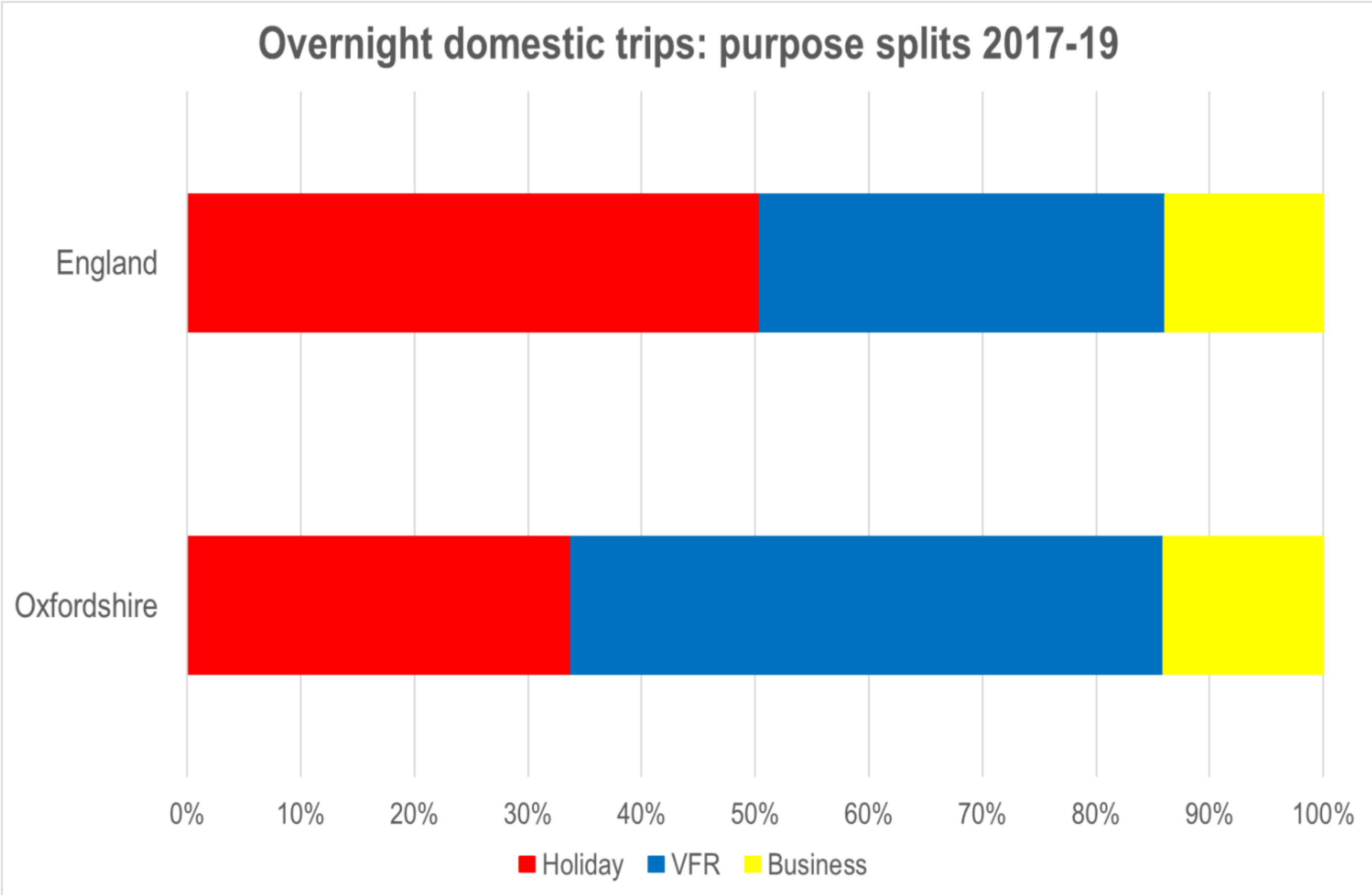


While not suggesting that these are the counties offering the most pertinent competition to Oxfordshire in terms of domestic overnight tourism it is perhaps nonetheless informative to take a look at those English counties that are in the same area of the 'league table' when it comes to the volume of such trips, and this is shown in the following table for each of the three main journey purpose categories.

Millions of domestic overnight domestic trips (2017-19 annual average)

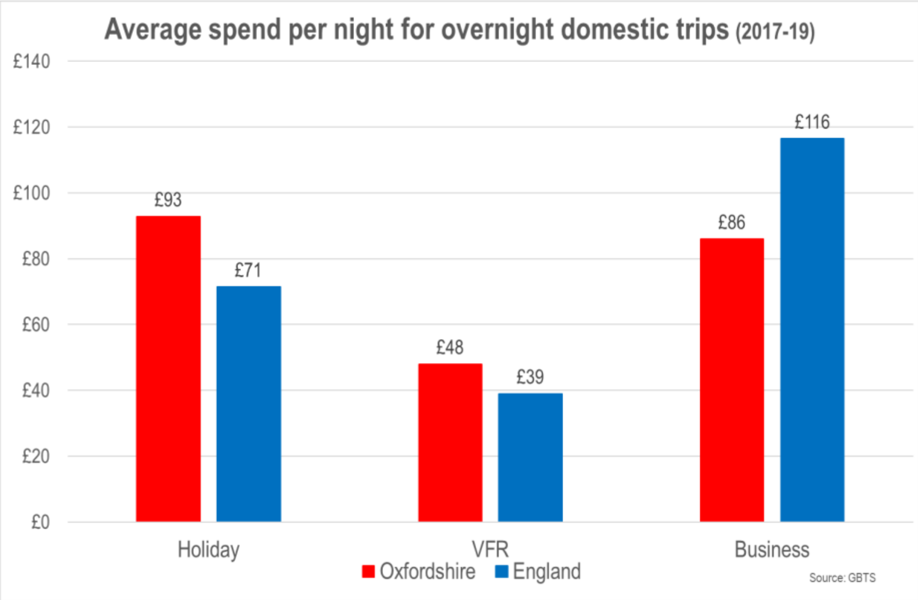
Holiday		VFR		Business	
London	3.95	London	4.46	London	3.22
Devon	3.40	Greater Manchester	1.42	West Midlands	1.08
North Yorkshire	3.25	West Midlands	1.39	Greater Manchester	0.96
Cornwall and Isles of Scilly	3.21	Hampshire	1.36	Hampshire	0.50
Cumbria	2.68	Devon	1.31	North Yorkshire	0.44
Dorset	1.92	West Yorkshire	1.24	West Yorkshire	0.43
Norfolk	1.89	Bristol/Bath area	1.18	Bristol/Bath area	0.42
Lancashire	1.59	Kent	1.16	Kent	0.33
Lincolnshire	1.38	North Yorkshire	1.10	Berkshire	0.32
Greater Manchester	1.29	Essex	1.03	Merseyside	0.30
East Sussex	1.25	East Sussex	0.90	Buckinghamshire	0.29
Somerset	1.20	Dorset	0.87	Lancashire	0.29
Hampshire	1.18	Cornwall and Isles of Scilly	0.85	South Yorkshire	0.27
Kent	1.11	Merseyside	0.80	Tyne and Wear	0.27
Merseyside	1.07	**Oxfordshire**	**0.80**	Devon	0.26
Bristol/Bath area	1.03	Norfolk	0.78	Hertfordshire	0.24
Derbyshire	1.00	Surrey	0.77	Cumbria	0.23
Northumberland	0.91	Cambridgeshire	0.74	Surrey	0.23
West Midlands	0.84	Tyne and Wear	0.72	Leicestershire	0.23
West Sussex	0.80	Derbyshire	0.71	Staffordshire	0.22
West Yorkshire	0.79	Cheshire	0.71	**Oxfordshire**	**0.22**
Gloucestershire	0.74	Hertfordshire	0.71	Warwickshire	0.21
Suffolk	0.72	South Yorkshire	0.69	Norfolk	0.20
Cheshire	0.71	Nottinghamshire	0.69	Cheshire	0.20
North Lincolnshire/Humberside	0.67	Lincolnshire	0.66	Cambridgeshire	0.20
Isle of Wight	0.61	Gloucestershire	0.64	Gloucestershire	0.19
Wiltshire, County of	0.59	West Sussex	0.63	Nottinghamshire	0.18
Tyne and Wear	0.56	Berkshire	0.63	Cornwall and Isles of Scilly	0.17
Essex	0.55	Cumbria	0.62	West Sussex	0.16
Berkshire	0.55	Lancashire	0.60	Lincolnshire	0.16
Shropshire	0.54	Leicestershire	0.58	Durham	0.16
Oxfordshire	**0.52**	Somerset	0.56	East Sussex	0.16
Staffordshire	0.51	Staffordshire	0.56	Derbyshire	0.16
Nottinghamshire	0.49	North Lincolnshire/Humbers	0.54	Wiltshire, County of	0.16
Warwickshire	0.45	Wiltshire, County of	0.54	Essex	0.15
South Yorkshire	0.39	Suffolk	0.52	Dorset	0.15
Cambridgeshire	0.39	Buckinghamshire	0.50	Suffolk	0.15
Durham	0.34	Shropshire	0.48	Northamptonshire	0.14
Bedfordshire	0.29	Northamptonshire	0.42	Bedfordshire	0.12
Worcestershire	0.29	Worcestershire	0.41	North Lincolnshire/Humberside	0.12
Buckinghamshire	0.29	Warwickshire	0.35	Somerset	0.11
Surrey	0.28	Bedfordshire	0.32	Shropshire	0.10
Northamptonshire	0.25	Durham	0.29	Worcestershire	0.10
Leicestershire	0.25	Northumberland	0.25	Northumberland	0.06
Hertfordshire	0.21	Herefordshire	0.18	Tees Valley	0.04
Herefordshire	0.19	Tees Valley	0.18	Herefordshire	0.04
Tees Valley	0.10	Isle of Wight	0.16	Isle of Wight	0.03
Rutland	0.04	South Gloucestershire	0.05	South Gloucestershire	0.01
South Gloucestershire	0.02	Rutland	0.05	Rutland	0.00

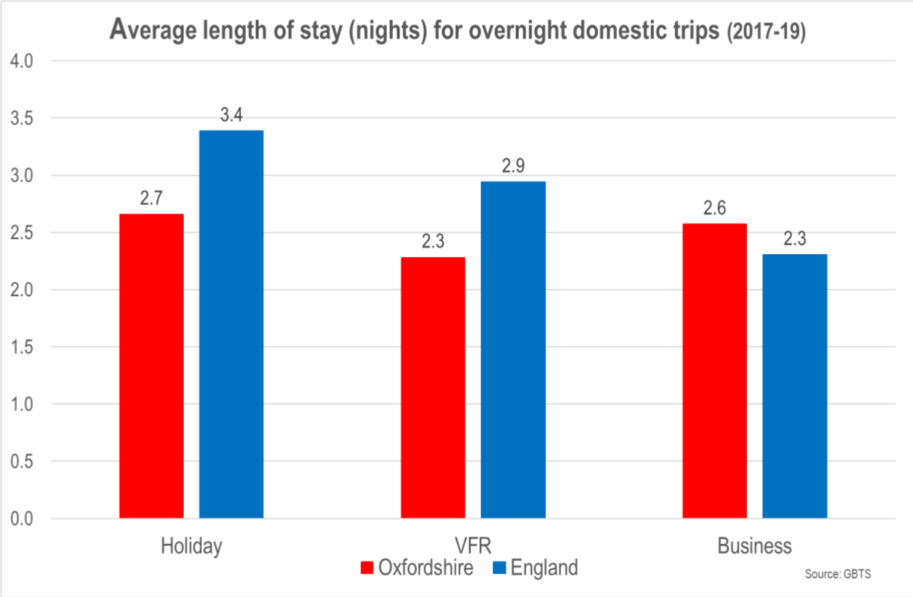
If we compare the journey purpose mix of domestic overnight tourism in Oxfordshire with that for England, we can observe from this chart that the county is more reliant on Visits to Friends and Relatives (VFR) trips than England, whereas at the national level half of trips are for a Holiday but in Oxfordshire the equivalent figure is around one-third.



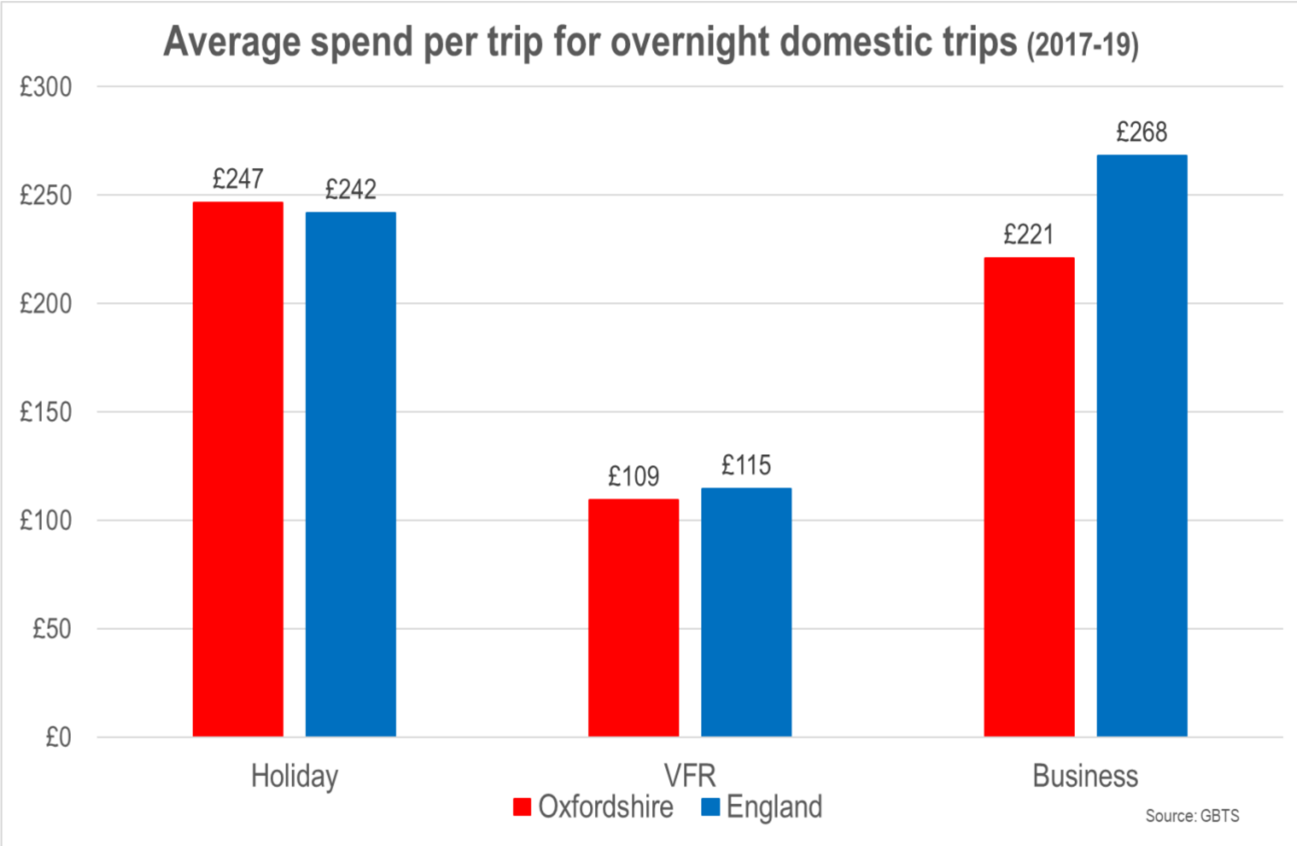
The average length of stay for both Holiday and VFR trips to Oxfordshire is typically a little lower than is the case across England as is evident from the following chart, while Business visits to the county are slightly longer on average than at the national level.

The reverse is true when we turn our attention to average spend per night, with both Holiday and VFR visitors to Oxfordshire spending more than the national average but Business visitors spending somewhat less.





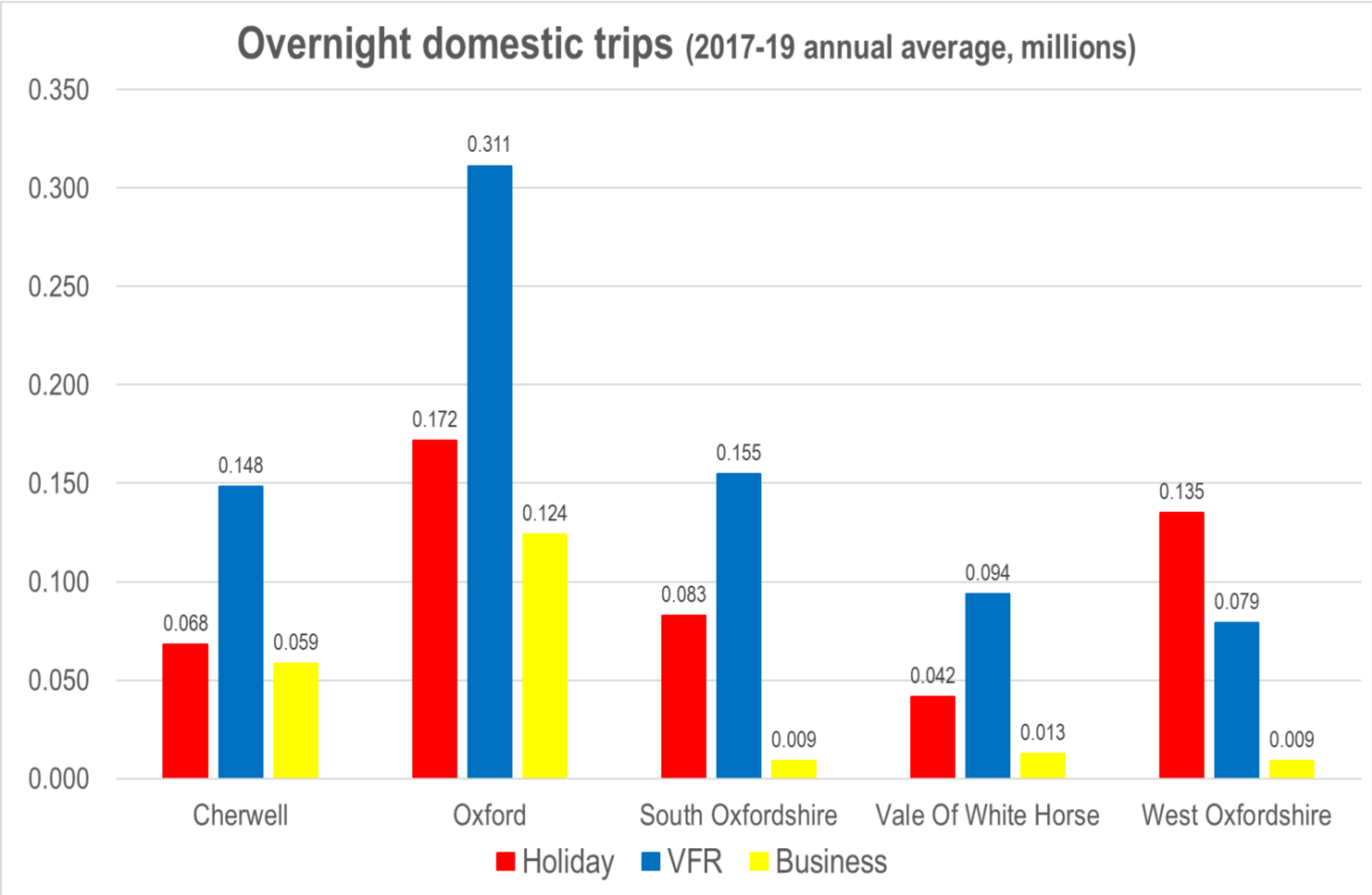
If we bring these metrics together to examine the amount of spending per visit we discover that the county is closely aligned with the national picture for Holiday and VFR trips but falls short of the national average when it comes to Business trips.



Looking at the distribution of trips by both Local Authority and journey purpose shows that VFR dominates in each area apart from West Oxfordshire where Holiday trips predominate.

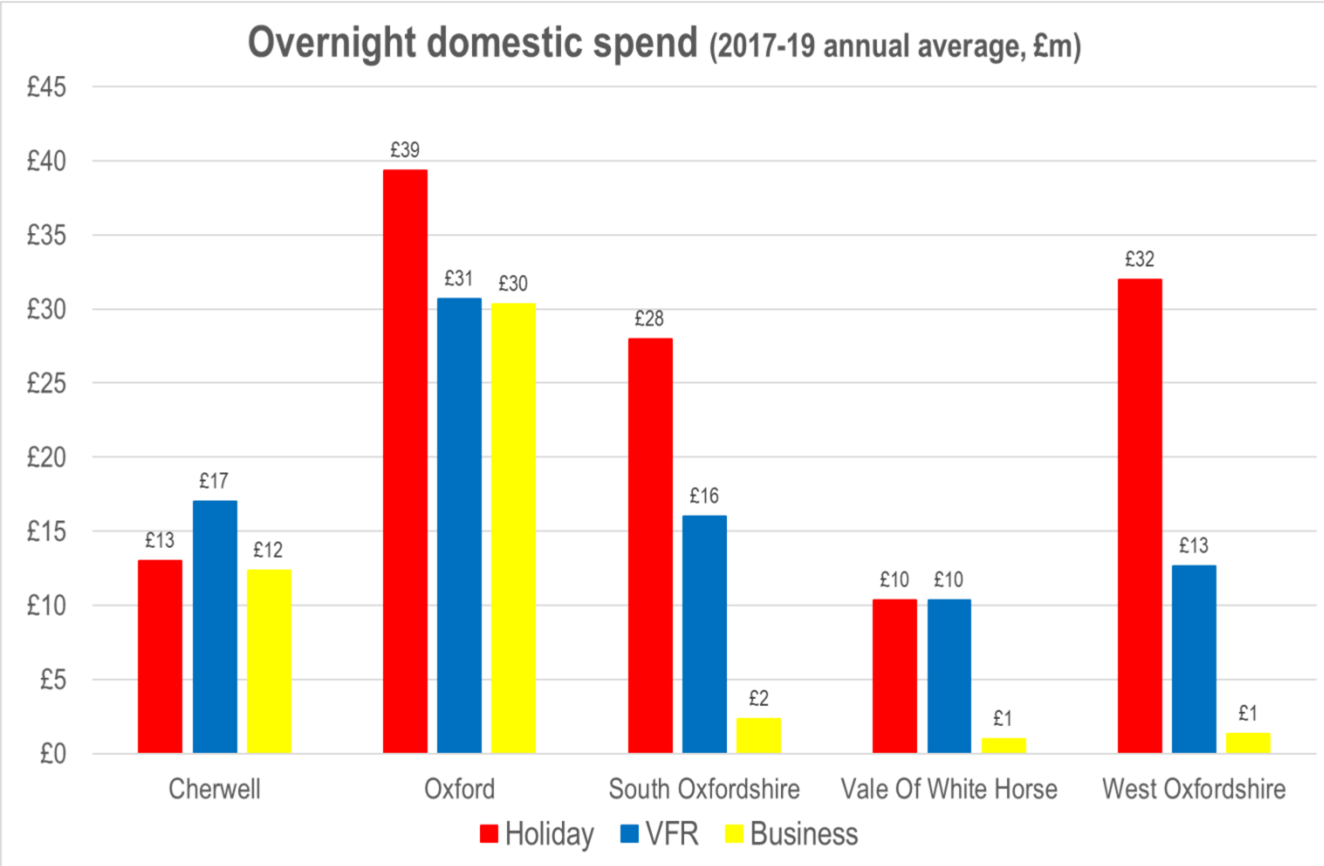
Oxford attracts the highest volume of trips across all three categories of trip purpose.

For both Cherwell and Oxford the volume of Business trips is not dissimilar to that of Holiday visits, whereas in the other three districts there are only a negligible amount of Business trips.



The story is somewhat different if we look at the same set of results but with a focus on spending, as can be seen from the later chart this sees an uptick in the relative importance of Holidays relative to VFR thanks to their higher spend profile. In most of the districts we can also spot that the importance of Business tourism is more evident once looking at spending than was the case when simply focussing on the volume of trips, especially in Cherwell and Oxford.

A study undertaken by VisitEngland focussing on GB residents who had taken a domestic holiday in the past month shone a light on the visitor profile of different destinations, one of which was Oxford. It was found that 53% of this group had visited at some stage in the past.



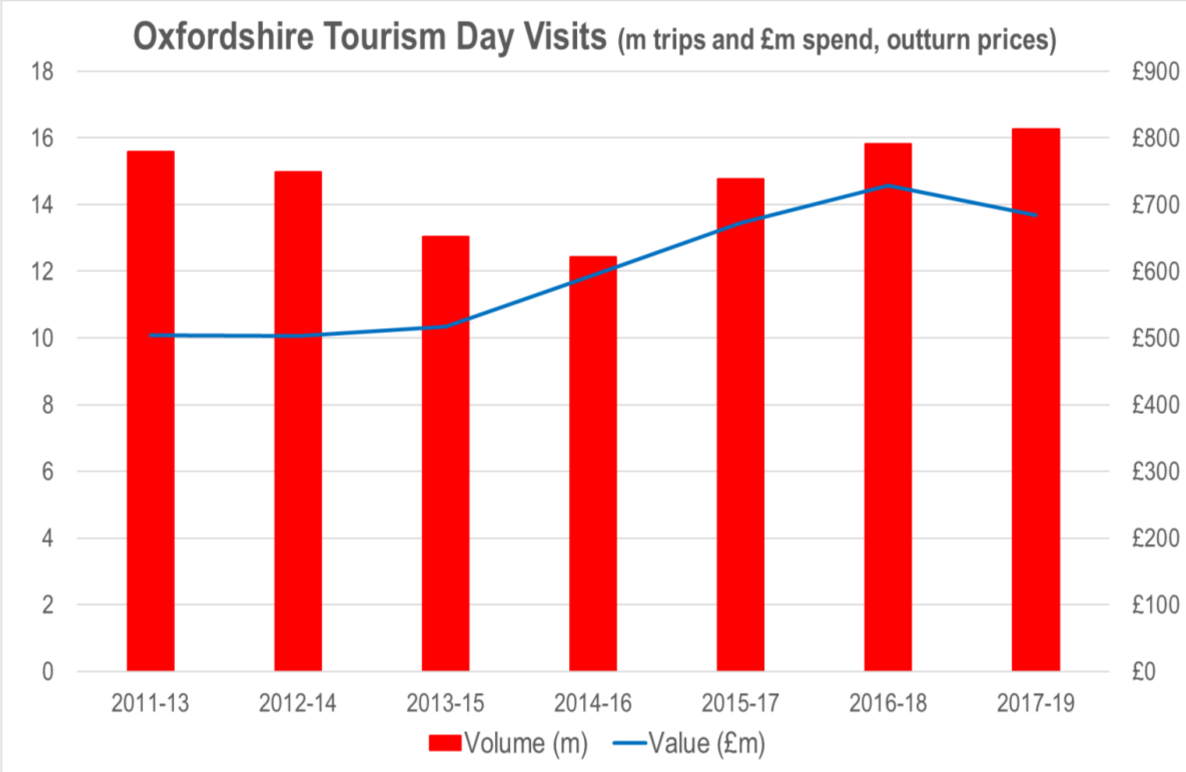
DOMESTIC TOURISM DAY VISITS

These visits area subset of 3 hour+ Leisure Day Visits defined as follows:

- Activities – involving participation in one or more of a series of specified leisure activities
- Duration – lasting at least 3 hours, including time spent travelling to the destination
- Regularity – the participant indicates that the visit (i.e. same activity in same place) is not undertaken 'very regularly'
- Place – the destination of the visit is different from the place (i.e. city, town, village or London borough) where the participant lives.

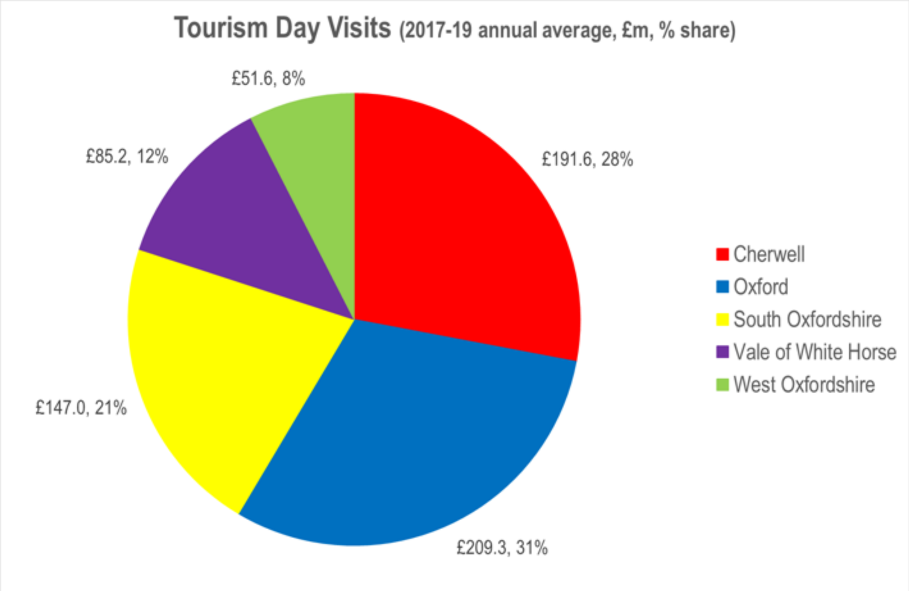
Starting with a glance at trends in both the volume and value of Tourism Day Visits in Oxfordshire indicates that after having dipped in the middle part of the last decade ahead of the pandemic the volume was on a par with that from 2011-13 by the end of the period under scrutiny.

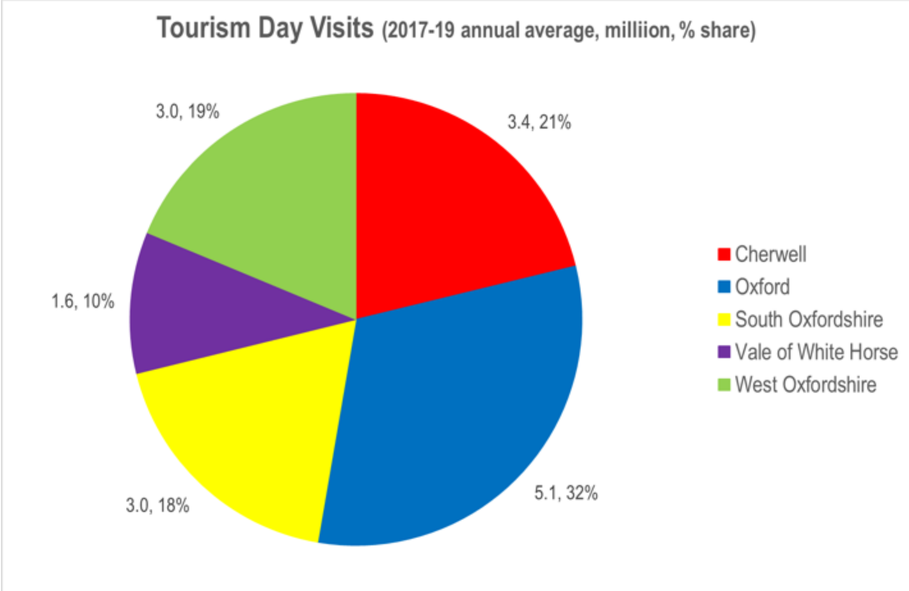
Before adjusting for inflation spending on Tourism Day Visits was on a gently upward trajectory.



As can be seen from the brace of pie charts the volume of Tourism Day Visits is fairly evenly spread across the five Local Authority areas.

Although caution is needed when it comes to the reliability of spend estimates it is interesting to note that the survey finds day visits to West Oxfordshire have a much lower spend profile than is the case in the remaining Local Authority areas, hence the much smaller proportion of overall spending accounted for in this area.





This may reflect tour groups visiting West Oxfordshire for 'sightseeing' but there being little by way of spending opportunities that feature in that part of their trip. However caution should be noted with small sample sizes when looking at district level data.

By contrast Cherwell sees its spend share being higher than its volume share, which may be accounted for by the presence of Bicester Village in Bicester.

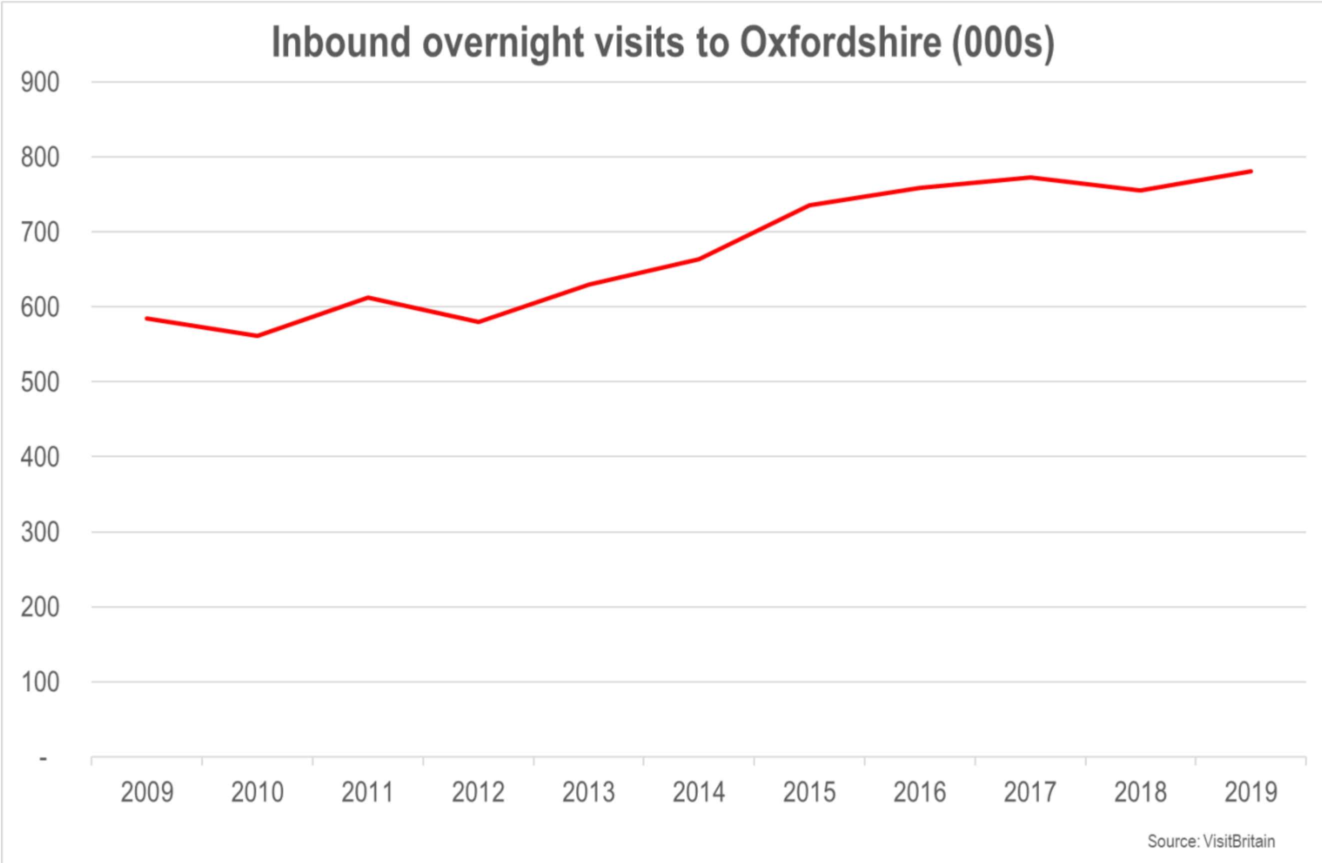
In order to provide a feel for the scale of Tourism Day Visits in the county the table below shows those English counties that sit astride Oxfordshire's tally, based on data for the period 2017-19.

	TDV (m)
London	309.3
Greater Mancheste	63.8
West Midlands	55.7
Kent	50.5
West Yorkshire	50.1
Essex	46.3
Devon	42.8
Hampshire	40.9
North Yorkshire	38.6
Norfolk	36.9
Lancashire	36.9
East Sussex	29.5
Tyne and Wear	27.5
South Yorkshire	27.3
Merseyside	27.2
Derbyshire	27.2
Nottinghamshire	27.0
Cheshire	27.0
Lincolnshire	26.5
Dorset	25.9
Cambridgeshire	25.1
Suffolk	25.0
Cornwall and Isles	24.9
Bristol/Bath area	23.3
Staffordshire	21.7
North Lincolnshire/I	21.6
Gloucestershire	21.1
West Sussex	21.1
Somerset	20.0
Leicestershire	20.0
Surrey	19.6
Cumbria	19.4
Buckinghamshire	19.2
Hertfordshire	18.6
Oxfordshire	**16.3**
Berkshire	16.1
Worcestershire	15.5
Shropshire	15.2
Northamptonshire	14.8
Warwickshire	14.0
Wiltshire	13.3
Durham	13.2
Northumberland	11.4
Bedfordshire	10.4
Tees Valley	7.8
Isle of Wight	5.5
Herefordshire	4.5
South Gloucesterst	2.6
Rutland	1.2

INBOUND OVERNIGHT TOURISM

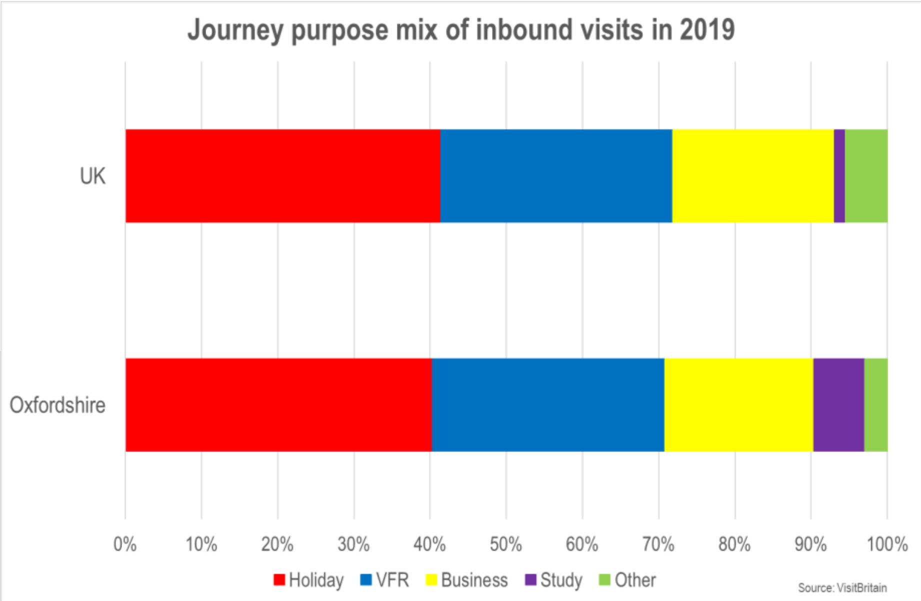
During the decade prior to the pandemic we can see from the following chart that there was a period of growth between 2013 and 2016, but both before and after this time volumes were fairly stable.

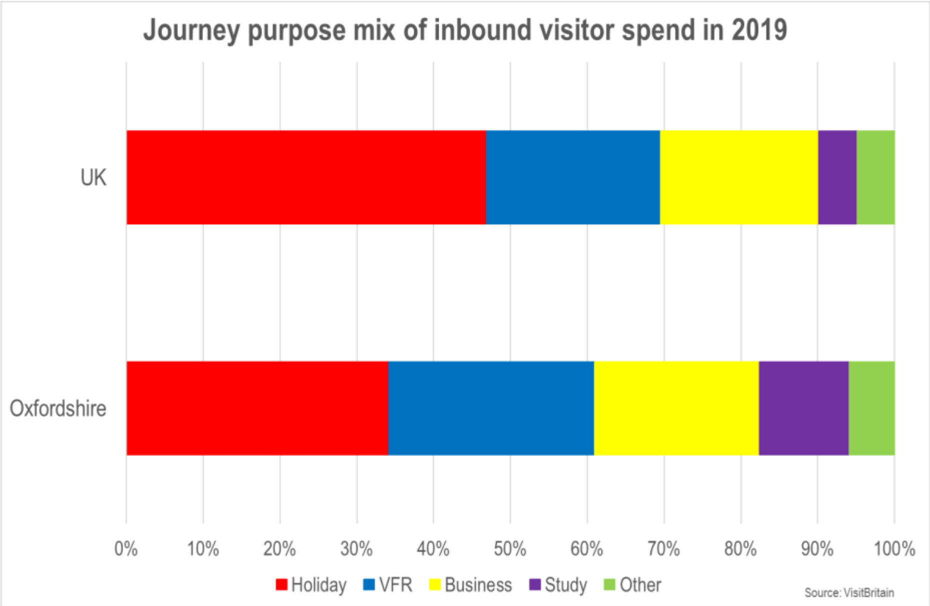
The number of overnight visits to Oxfordshire by overseas visitors grew by 34% during the 2009 to 2019 period, almost identical to the 31% seen across the UK as a whole.



Comparing the journey purpose mix of inbound overnight visits to Oxfordshire with that of the UK we can see that there are few significant variances with the exception of the county over-indexing in terms of the share of Study visits.

Differences in the amount spent per visit are quite marked in some cases, which accounts for the even greater share of inbound visitor spending in the county attributable to Study visits seen in the second chart.

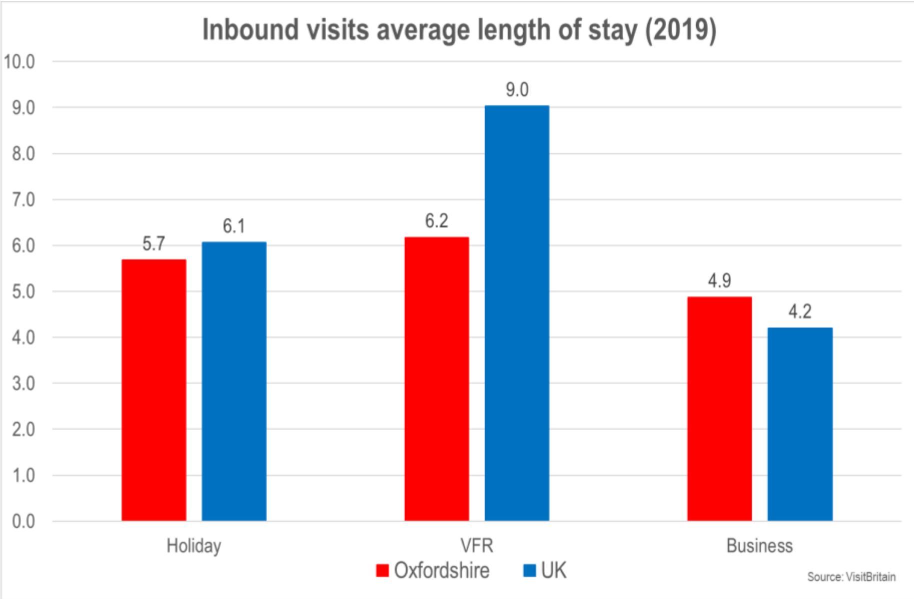


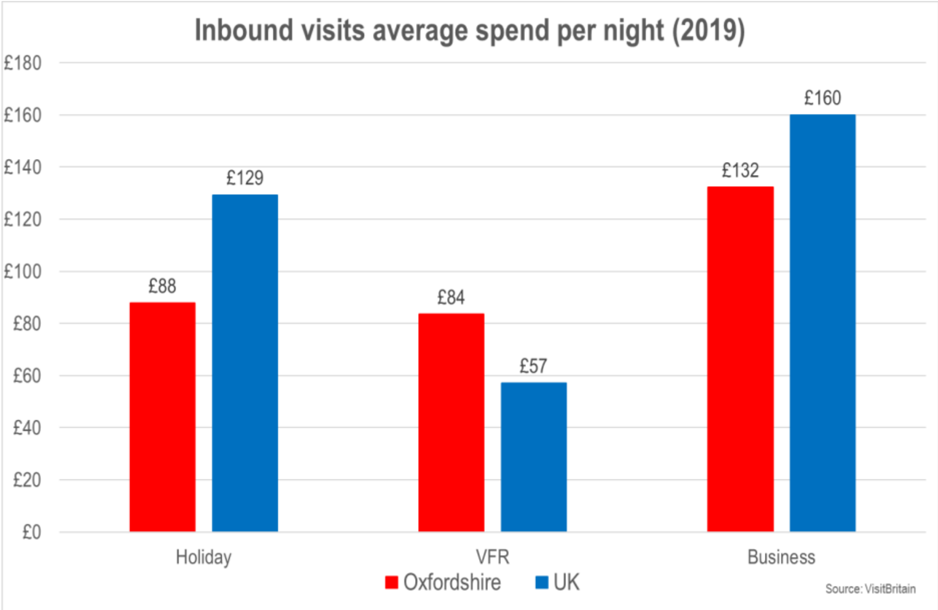


A further observation from these two charts is that Holidays account for a lesser share of spend relative to visits in the county compared with the UK. There are a few factors that sit behind this starting with average length of stay.

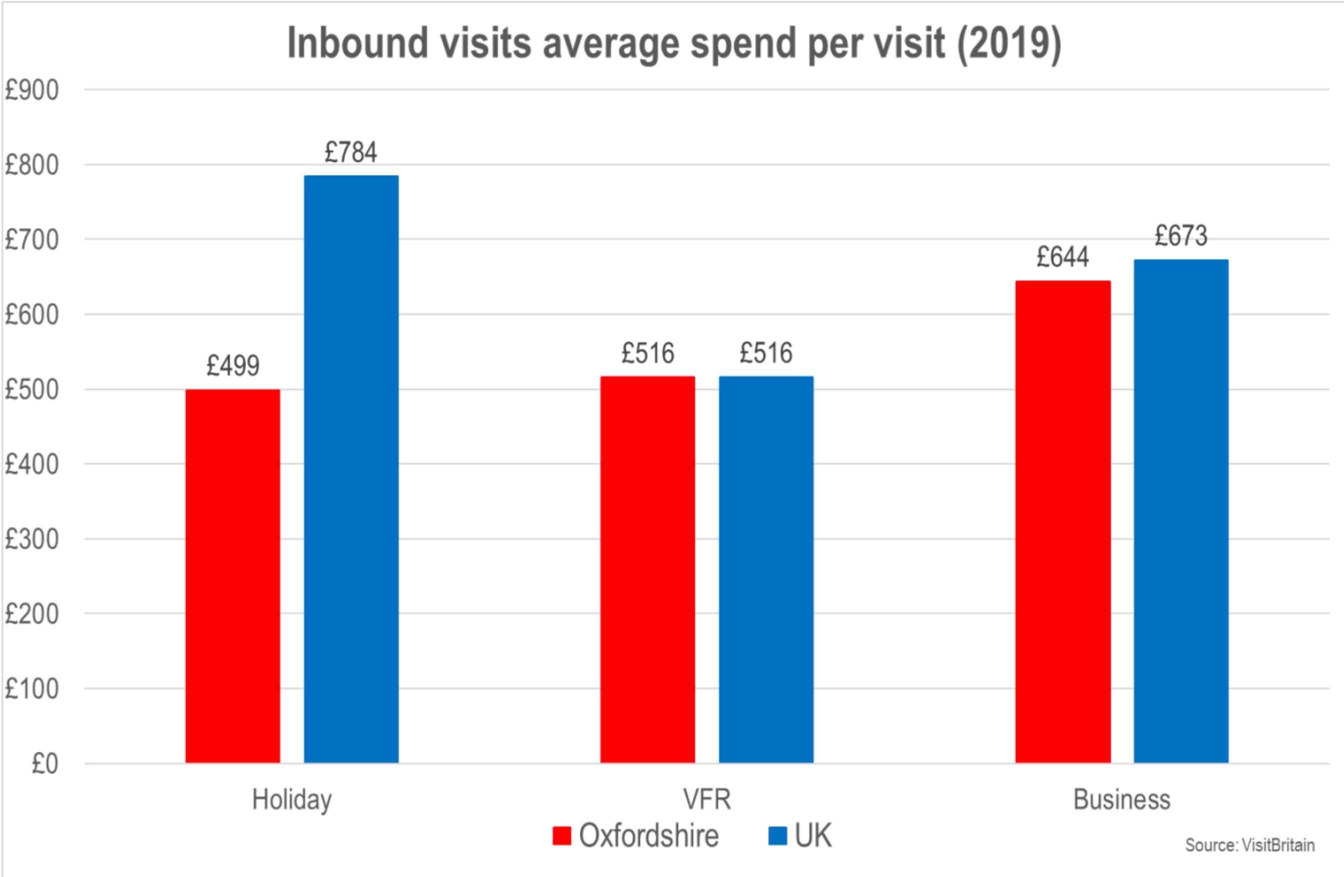
The next chart shows that while trips tend to last longer in the UK than in Oxfordshire, with the most pronounced for VFR trips.

In terms of spend per night the county lags the UK for both Holiday and Business visits from overseas but is ahead for VFR trips.





Bringing these parameters together and looking at spend per visit, the following chart, sees Oxfordshire being on a par with the UK for VFR and Business but falling short when it comes to the average amount spent by a Holiday visitor.

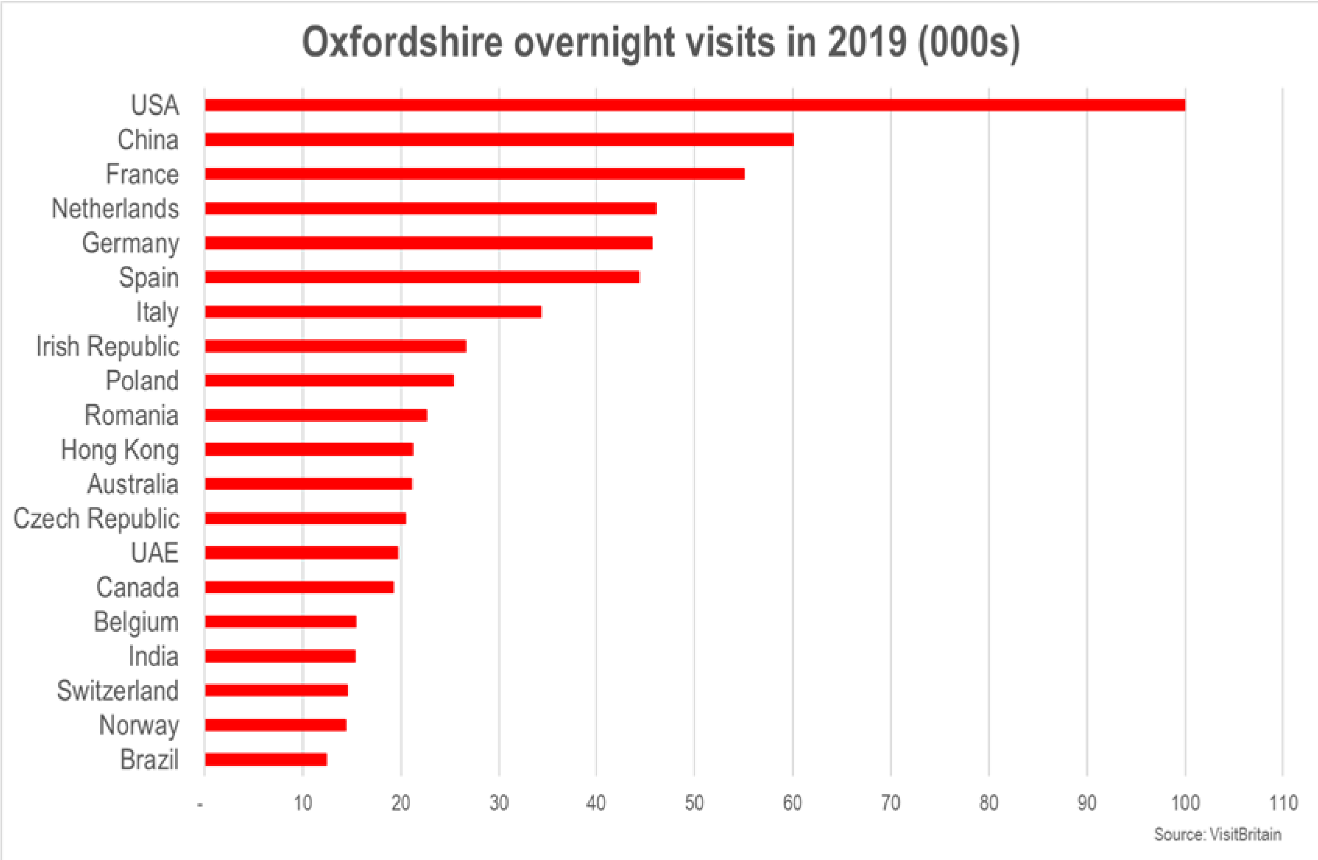


While not indicative of the areas against which Oxfordshire is necessarily competing it is worth seeing where, for each journey purpose, the county sits in relation to other areas of the country, and this is done in the following table, demonstrating just how vital Oxford is in attracting international study visits as it comes second only to London.

Annual average staying visits 2017-19, 000s

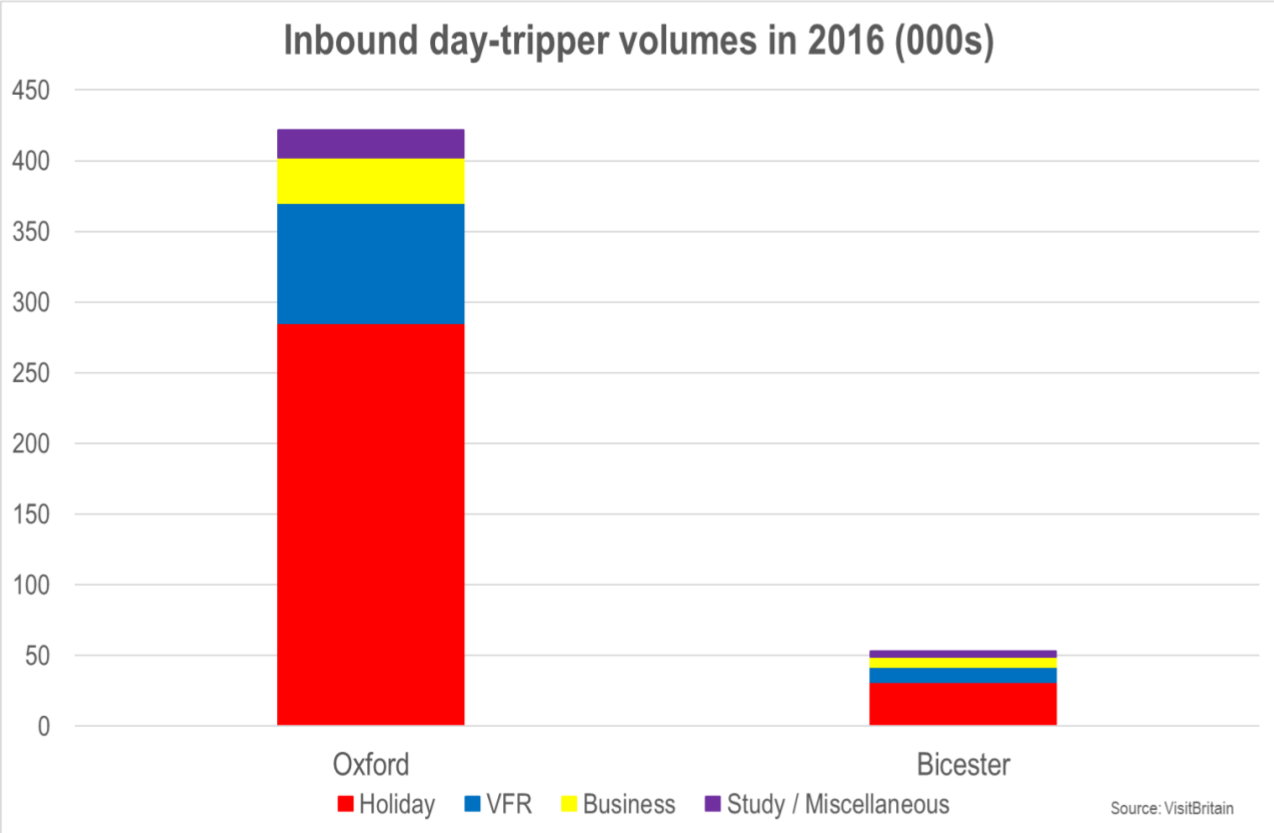
	Holiday		VFR		Business		Study
London	11,009	London	5,234	London	3,893	London	222
Gtr Manchester	537	Gtr Manchester	559	West Midlands Met County	661	**Oxfordshire**	**36**
East Sussex	407	West Midlands Met County	480	Gtr Manchester	441	East Sussex	36
Kent	399	Hampshire	325	Kent	308	Cambridgeshire	33
Merseyside	363	East Sussex	321	Berkshire	220	Gtr Manchester	32
Somerset	353	Surrey	318	Merseyside	160	West Midlands Met County	23
Oxfordshire	**308**	Kent	313	Cambridgeshire	156	Merseyside	18
West Midlands Met County	277	Hertfordshire	287	**Oxfordshire**	**152**	Kent	17
Cornwall & Scillies	250	Berkshire	274	West Yorkshire	148	Somerset	15
North Yorkshire	249	**Oxfordshire**	**247**	Bristol UA	146	Bristol UA	14
Cambridgeshire	241	Cambridgeshire	236	Hampshire	143	Dorset	14
Devon	223	Bristol UA	235	Essex	129	Devon	14
Hampshire	209	West Yorkshire	229	Warwickshire	112	Hampshire	12
Bristol UA	208	Essex	226	Northamptonshire	102	South Yorkshire	9
Berkshire	191	Merseyside	225	Surrey	99	Leicestershire	9
Warwickshire	160	Somerset	220	West Sussex	95	West Yorkshire	9
Dorset	155	West Sussex	200	Bedfordshire	91	North Yorkshire	8
West Sussex	150	Buckinghamshire	171	Nottinghamshire	87	Lancashire	7
Cumbria	150	Cheshire	162	Buckinghamshire	85	Tyne & Wear	7
Wiltshire	141	Devon	160	Tyne & Wear	83	Berkshire	6
West Yorkshire	122	North Yorkshire	160	Leicestershire	83	West Sussex	6
Surrey	119	Lancashire	152	East Sussex	79	Warwickshire	5
Gloucestershire	113	Dorset	151	Cheshire	79	Nottinghamshire	5
Essex	109	Nottinghamshire	151	Hertfordshire	78	Essex	5
Hertfordshire	103	South Yorkshire	141	South Yorkshire	75	Hertfordshire	4
Tyne & Wear	100	Bedfordshire	139	Derbyshire	69	Durham	4
Lancashire	87	Leicestershire	138	North Yorkshire	63	Suffolk	3
Bedfordshire	84	Warwickshire	135	Wiltshire	61	Gloucestershire	3
Cheshire	83	Tyne & Wear	128	Somerset	56	Cheshire	3
Buckinghamshire	68	Gloucestershire	120	Staffordshire	44	Hull UA	3
Nottinghamshire	65	Norfolk	114	Suffolk	43	Surrey	3
Lincolnshire (excl N&NE)	63	Wiltshire	109	Lincolnshire (excl N&NE)	43	Northamptonshire	3
Leicestershire	53	Derbyshire	106	Devon	40	Wiltshire	2
South Yorkshire	50	Hereford & Worcester	95	Shropshire	39	Bedfordshire	2
Derbyshire	50	Suffolk	94	Gloucestershire	37	Derbyshire	2
Norfolk	49	Northamptonshire	89	Lancashire	36	Cornwall & Scillies	2
Hereford & Worcester	46	Cornwall & Scillies	88	Dorset	32	Cumbria	2
Staffordshire	42	Cumbria	82	Hereford & Worcester	31	Staffordshire	2
Suffolk	40	Lincolnshire (excl N&NE)	79	Norfolk	25	Isle of Wight	2
Northamptonshire	36	Staffordshire	76	Cumbria	24	Shropshire	1
Northumberland	32	Shropshire	65	Hull UA	20	Tees Valley/Cleveland	1
Durham	30	Durham	47	Durham	17	Buckinghamshire	1
Shropshire	23	Hull UA	32	Northern Lincolnshire	13	Norfolk	1
Isle of Wight	20	Northumberland	30	Tees Valley/Cleveland	13	Lincolnshire (excl N&NE)	1
Hull UA	12	Tees Valley/Cleveland	29	Cornwall & Scillies	10	East Yorkshire	1
East Yorkshire	10	Isle of Wight	23	Northumberland	7		
Northern Lincolnshire	6	East Yorkshire	21	East Yorkshire	5		
Tees Valley/Cleveland	6	Northern Lincolnshire	20	Isle of Wight	2		

In terms of the largest source markets for the county two long-haul markets held sway at the top of the staying visits chart for the county back in 2019, namely the USA and China ahead of a cluster of EU source markets headed by France.



DAY VISITS BY INBOUND VISITORS

The International Passenger Survey does not routinely collect information on where international visitors travel to on day trips, the only geographical information collated covers where they stay overnight. However, in 2016 VisitBritain sponsored a question on the ONS survey to establish the extent of day-tripping by overseas visitors and the destinations visited on those trips.



From this it is possible to establish that Oxfordshire saw around half a million day visits by overseas visitors that year, with Oxford being the most visited destination in the county.

The following chart shows the overall journey purpose of those inbound visitors who undertook a day trip to either Oxford or Bicester (the only two destinations within the county for which estimates are available).

For those in the UK for a Holiday, Study or for Business reasons Oxford was the third most visited destination for day trips, while for those here for a VFR trip it was ranked 6th.

LOCAL ECONOMIC IMPACT STUDIES

While the nationally produced data shared above provides useful comparison at a county level against other regions, it can be argued that it does not accurately reflect the picture at the local level. For this reason many destinations invest in local economic impact studies for their areas. These are prepared by different companies who model the impact in a locality using the national data sets and modelling outputs based on a number of other variables including locally collected data (occupancy, attraction visits etc).

Within Oxfordshire, Experience Oxfordshire supply economic impact studies for the County and district level studies for Cherwell and Oxford City as well as the county. In West Oxfordshire, Cotswolds Plus provide a study for the district as part of Cotswold-wide studies. Below are the key results of these studies for 2019.

West Oxfordshire 2019 (South West Research Company)

	Domestic Staying	Overseas Staying	Day Trips	Total
Trips	464,000	84,500	3,475,000	4,023,500
Nights	1,023,000	674,000	-	1,697,000
Spend £m	80.316	43.093	123.555	246.964
Employment				4,389 roles 3,197 FTEs

City of Oxford 2019 (Destination Research)

	Domestic Staying	Overseas Staying	Day Trips	Total
Trips	639,000	577,000	6,606,504	7,822,504
Nights	1,424,000	3,719,000	-	5,143,000
Spend £m	143.499	312.514	318.588	733.539

Employment				17,032 roles 12,551 FTEs
*following adjustments made to avoid double counting				

Cherwell District 2019 (Destination Research)

	Domestic Staying	Overseas Staying	Day Trips	Total
Trips	342,000	60,000	7,762,189	8,164,189
Nights	833,000	425,000	-	1,258,000
Spend £m	71.045	18.537	344.171	404.496*
Employment				8,786 roles 6,318 FTEs
*following adjustments to avoid double counting				

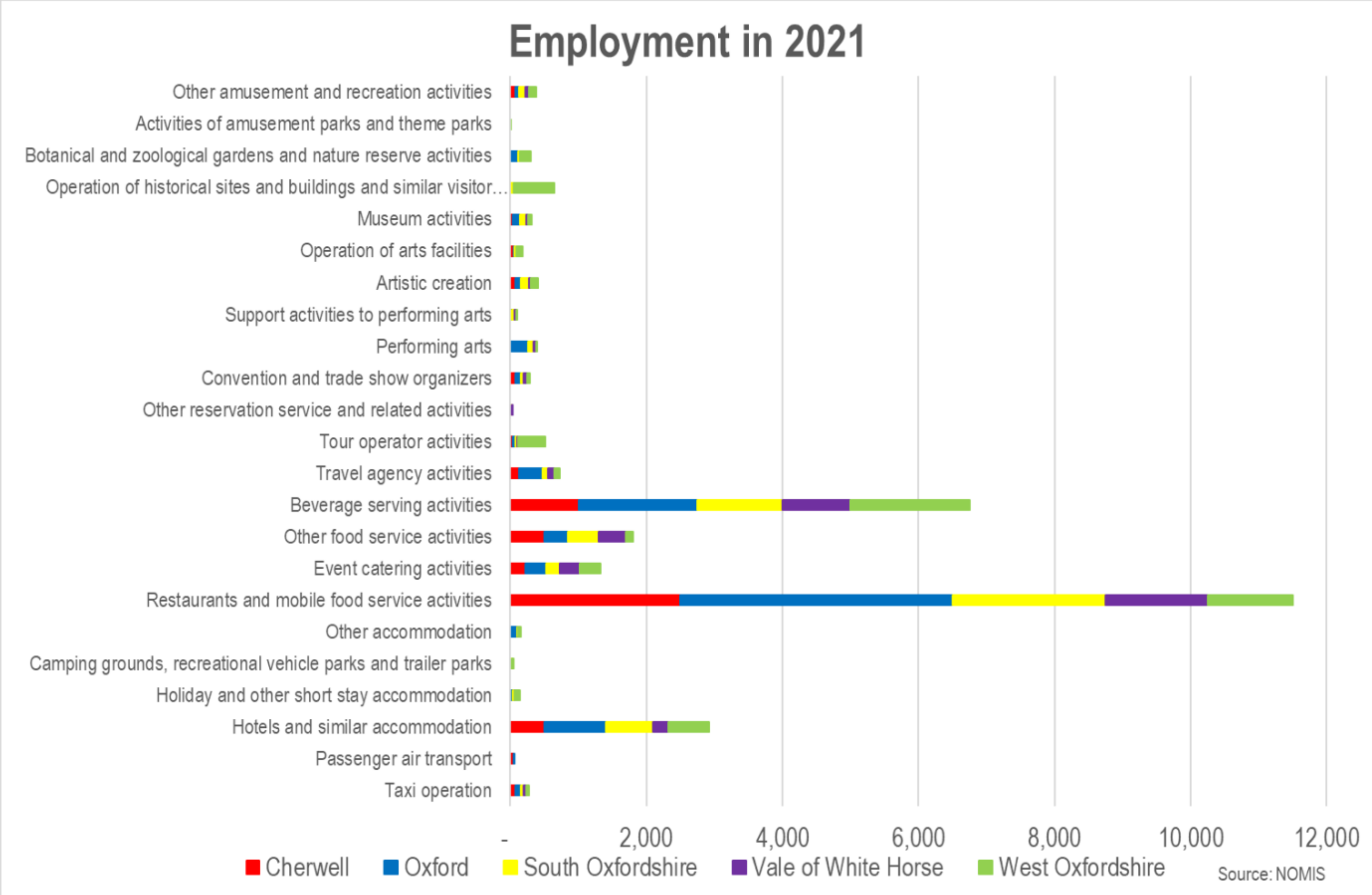
Oxfordshire County 2019 (Destination Research)

	Domestic Staying	Overseas Staying	Day Trips	Total
Trips	2,074,000	769,000	28,077,232	30,920,232
Nights	5,303,000	5,230,000	-	10,533,000
Spend £m	446.084	378.217	1,235.775	1,947.280*
Employment				42,077 roles 30,657 FTEs
*following adjustments to avoid double counting				

VISITOR ECONOMY EMPLOYMENT

The most recent detailed employment data at the local level broken down by Standard Industrial Classification relates to 2021, available through NOMIS. Based on a cohort of 4-digit SIC groups that align with travel and tourism it is possible to establish that in total employment accounted for by these activities exceeded 29,000 in 2021, varying as a percentage of total employment by Local Authority from 5.4% in Vale of White Horse to 12.0% in West Oxfordshire.

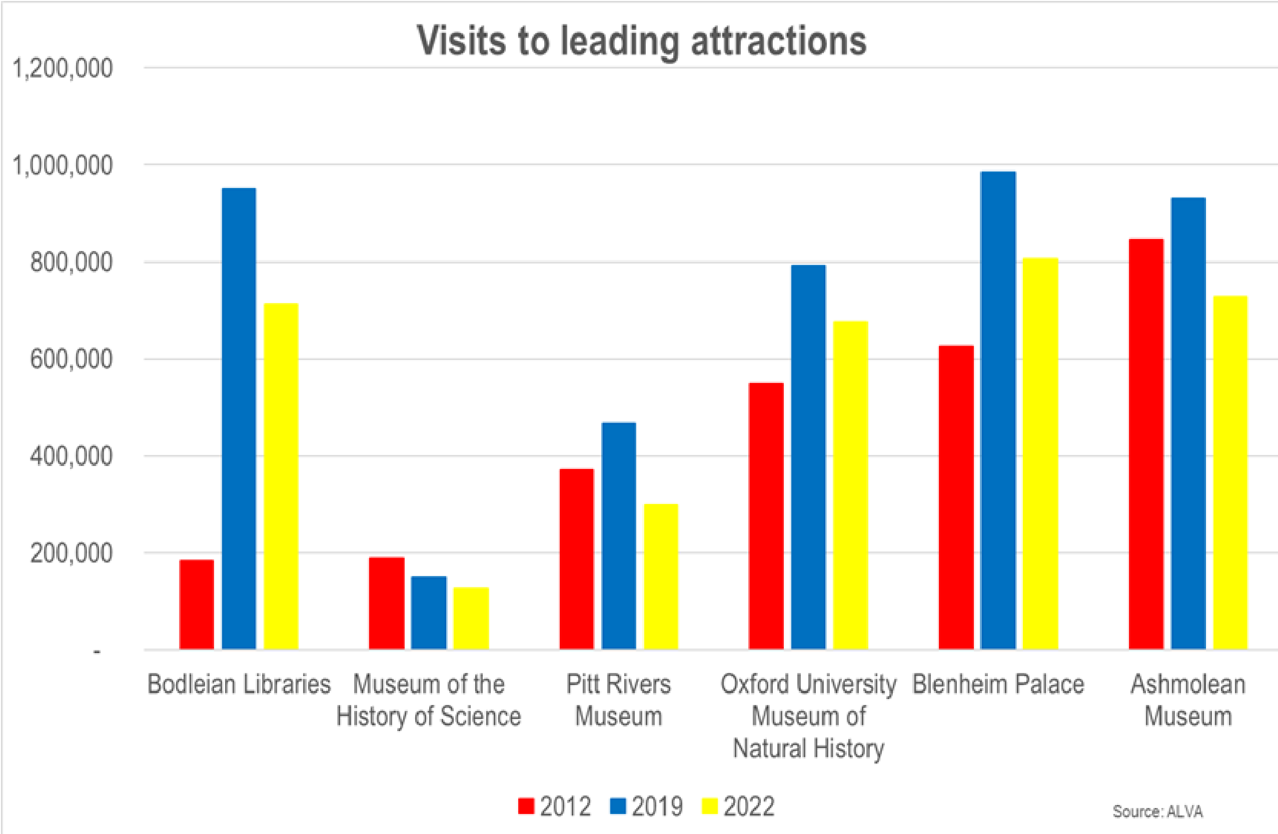
The following chart shows employment by SIC and Local Authority, confirming that three activities dominate, namely ‘restaurants and mobile food service activities’, ‘beverage serving activities’ and ‘hotels and similar accommodation’.



VISITS TO VISITOR ATTRACTIONS

We can get a more contemporary feel for how the visitor economy in the county is performing by taking a look at data from the Association of Leading Visitor Attractions as figures for 2022 have now been released.

While not covering all attractions in the county we can note that among those for which data is available last year saw visits still 22% below the 2019 level. The following chart depicts the number of visits in 2012, 2019 and 2022. It should be recognised that the nature of the offer at Bodleian Libraries has changed substantially in recent years meaning that the uptick in visits should be treated with caution. Nevertheless, the aggregate increase among the remaining attractions between 2012 and 2019 stood at 29%, which compares favourably with the 21% growth over this period for ALVA member attractions across the UK.

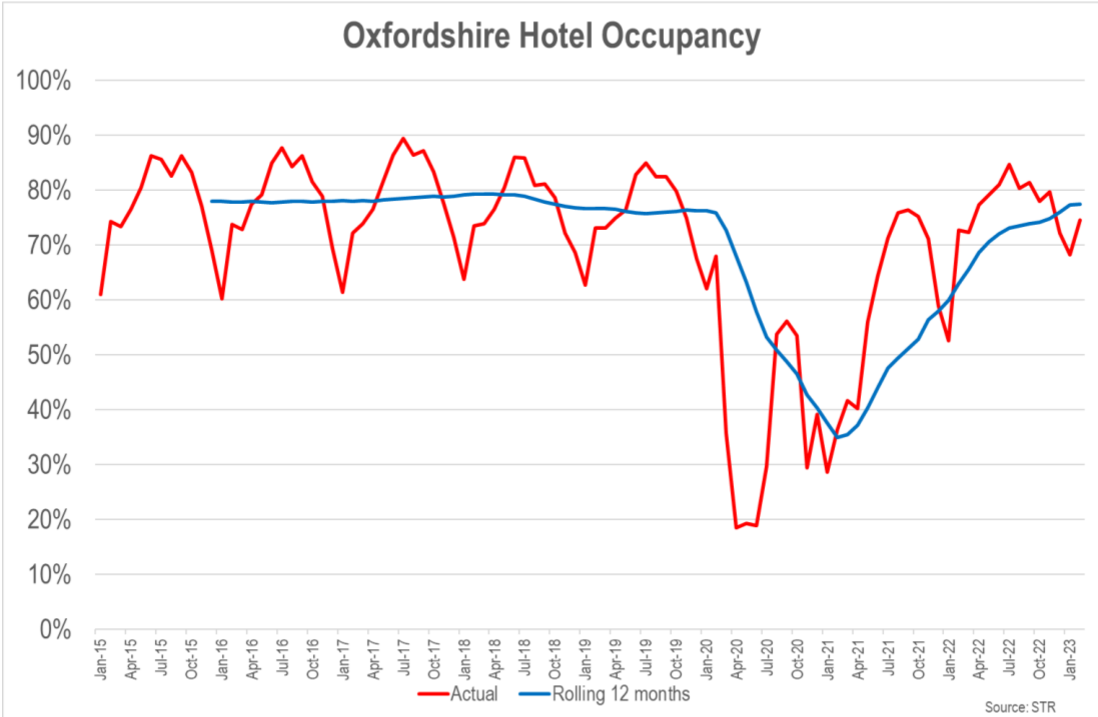


SEASONALITY

The current Economic Impact document for Oxfordshire from Experience Oxfordshire suggests that for overnight tourism July is the peak month for both volume and value and January the quietest month, while for day visits it is estimated that August is the peak month and February the quietest.

ACCOMMODATION

Data from STR helps shine a light on seasonality in the county, with the following chart based on information provided to STR from around 60% to 65% of the hotel rooms on the STR Census of rooms available in, or close to, the county of Oxfordshire.

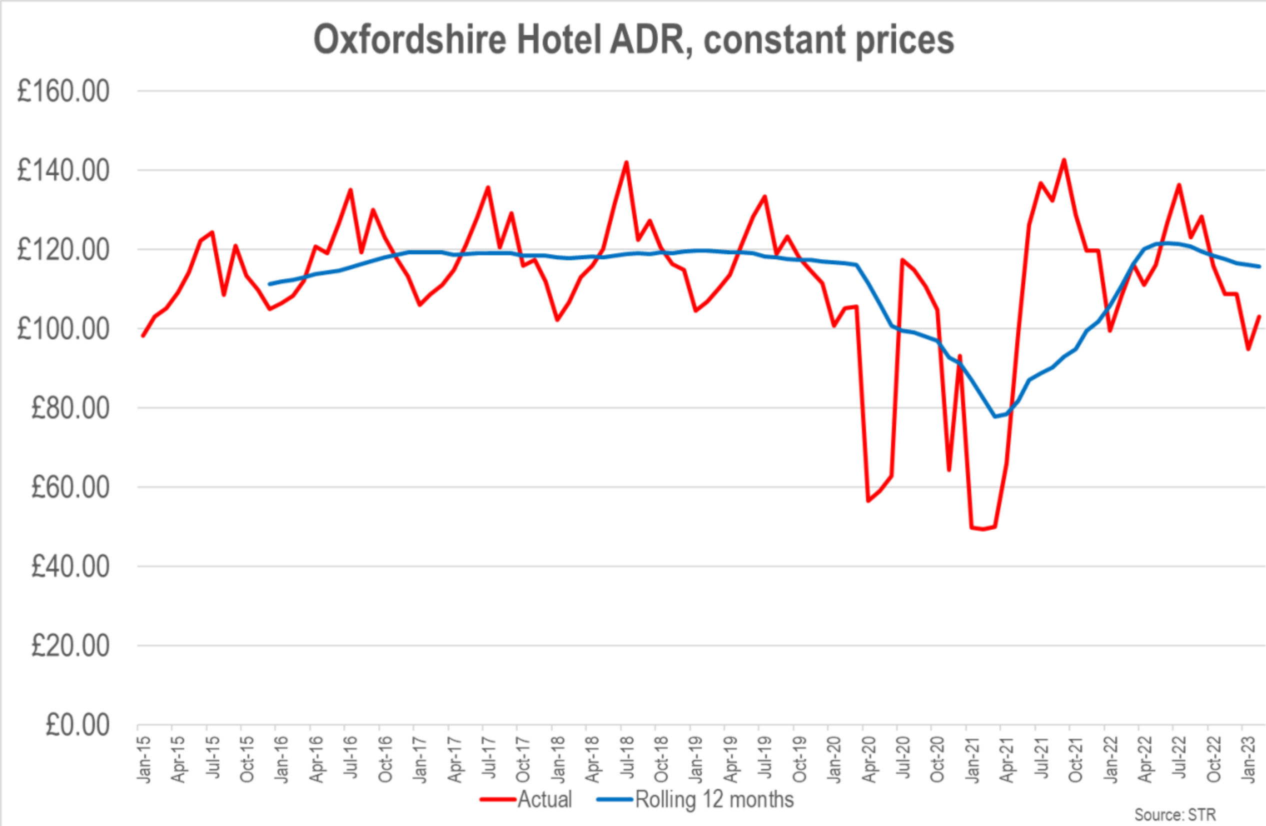


Monthly data for the period from January 2015 to February 2023 has been analysed and the first of the following charts shows room occupancy for each individual month and also on a twelve-month moving average basis. It is strikingly evident that demand is highly seasonal (outside of the period impacted by Covid-19) with a marked trough in January and a peak between June and August.

On a moving average basis occupancy was fairly static ahead of the pandemic and has now recovered to within two percentage points of the 79% that had been the norm.

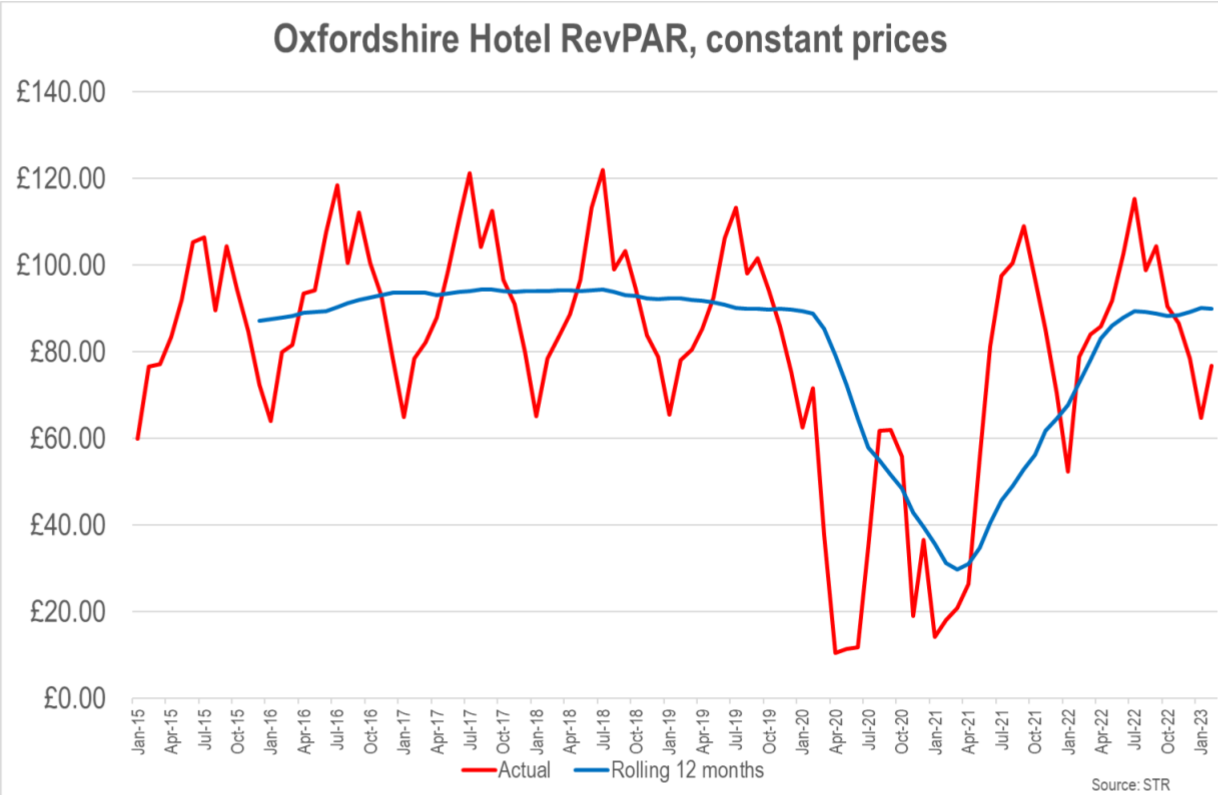
It is not known to what extent data for hotels in the county is being impacted by some of the nation's hotel stock being utilised by the government for the purpose of housing refugees.

Looking at Average Daily Room Rates (ADR) we can see that (having adjusted for inflation) July traditionally sees the highest rates and January the lowest, with a differential in excess of £30 between these months. On a moving average basis ADR was higher in real terms during the summer of 2022 than had been the case in any of the five summers ahead of the pandemic.

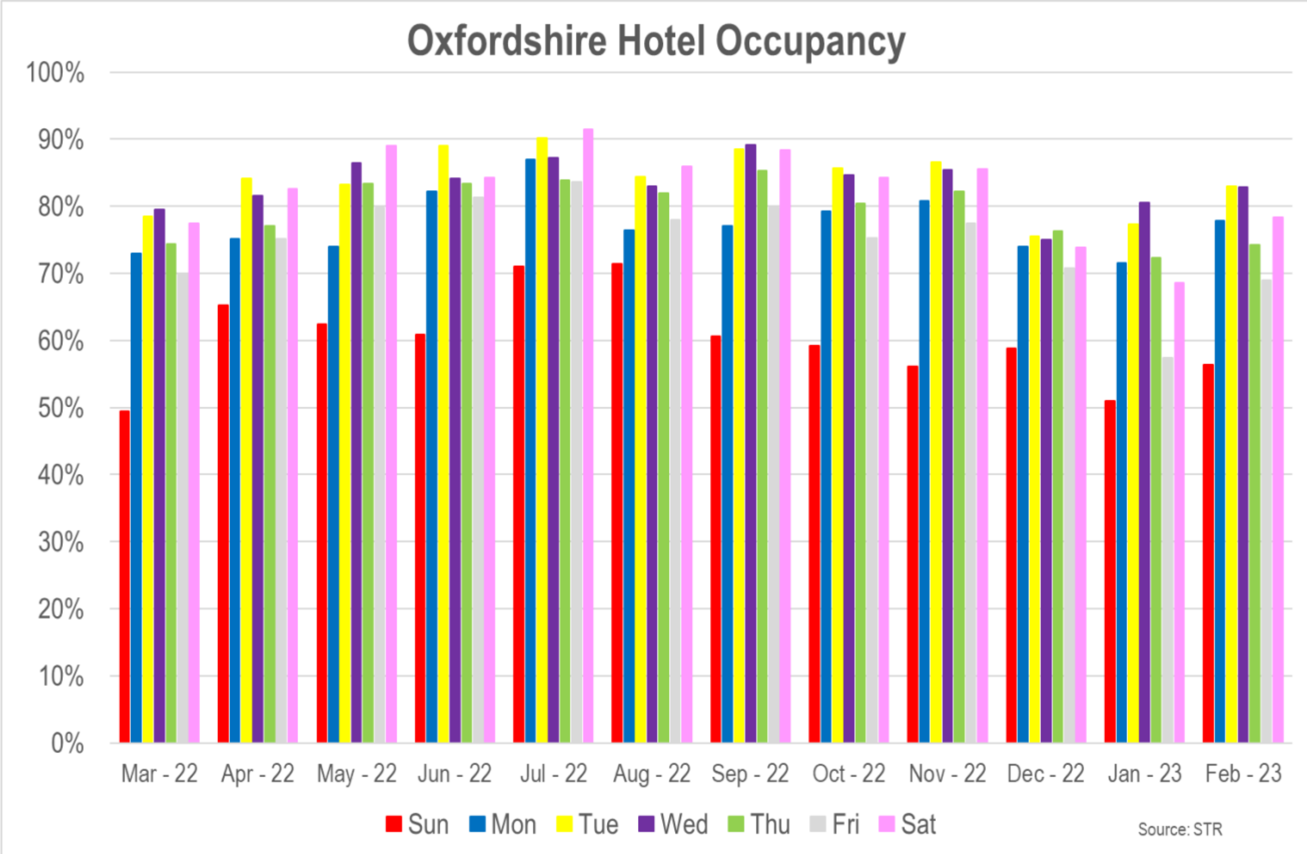


Bringing occupancy and ADR together produces what is known as RevPAR, or Revenue per Available Room and here we find that courtesy of occupancy not having fully regained its pre-pandemic level on a smoothed basis last summer saw RevPAR about £5 shy of where it was for much of 2017 and 2018.

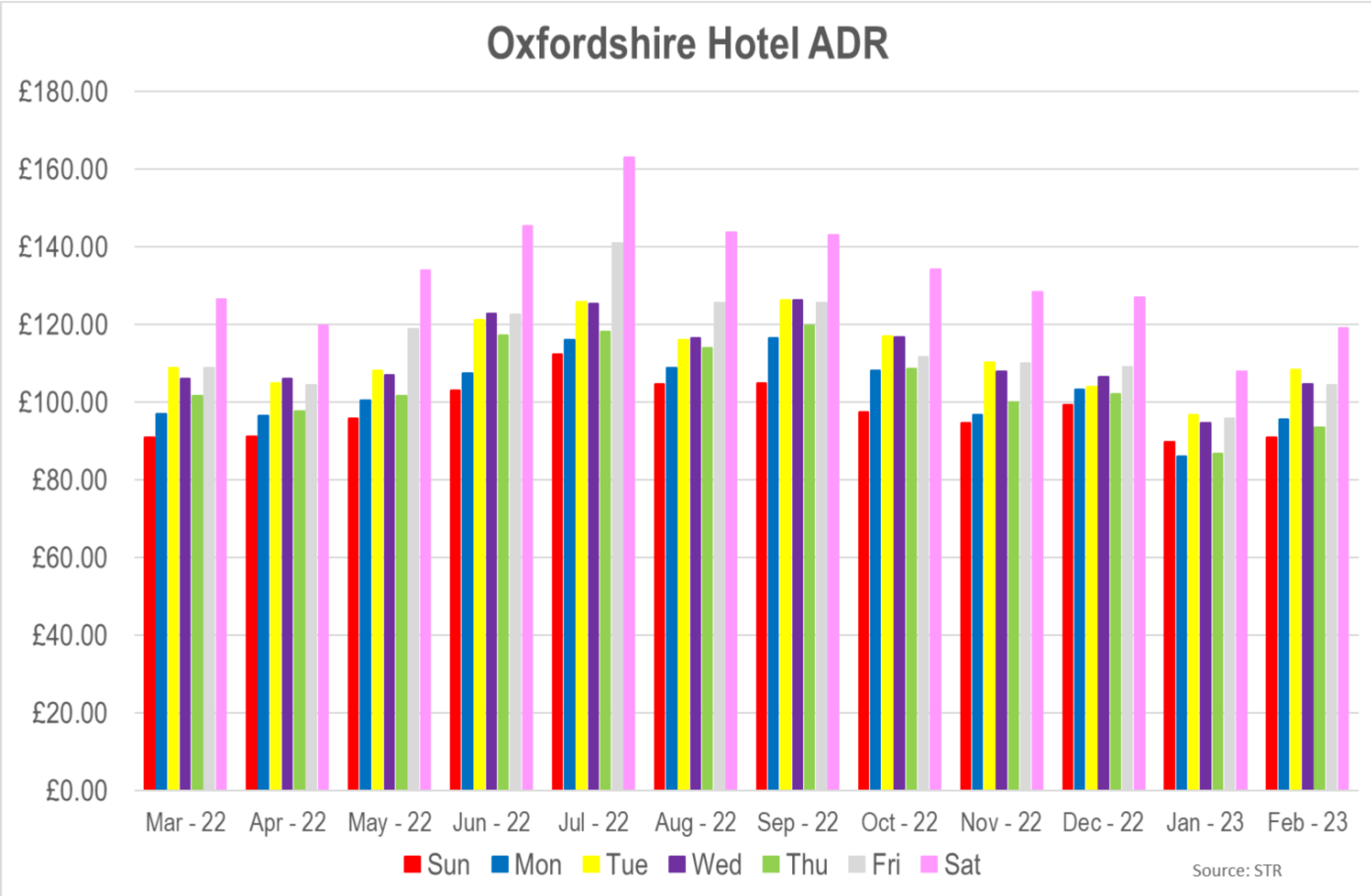
Comparing RevPAR data for Oxfordshire with that for the wider geography of South East England (based on data published by VisitEngland) it is evident that throughout 2022 the county consistently outperformed the wider region.



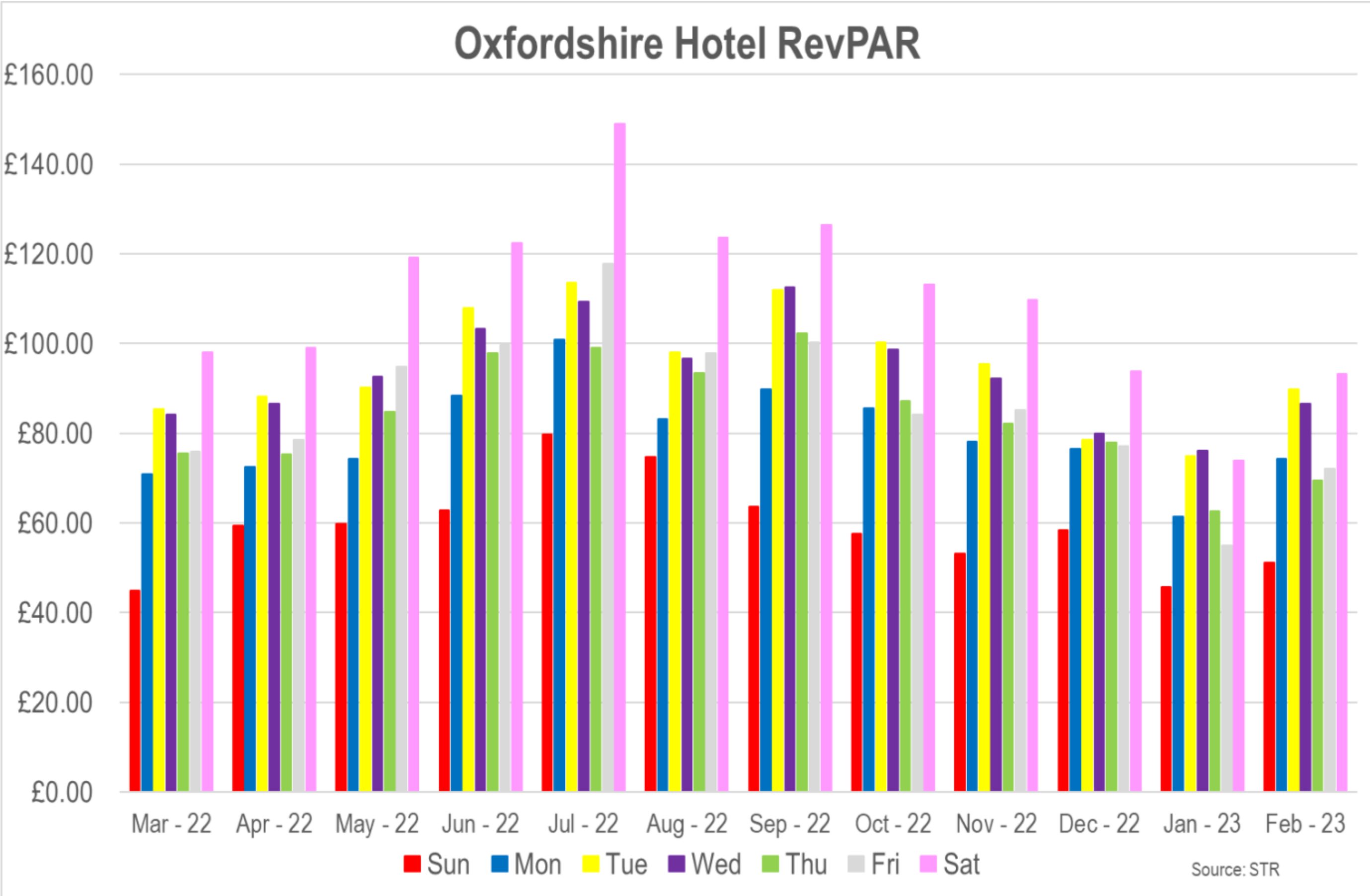
Switching attention to performance by day of week and with a focus just on the most recent twelve months we can observe from the following chart that Tuesdays, Wednesdays or Saturdays have typically delivered the highest occupancy in recent times while Sundays consistently fall a long way short of other days of the week.



Hoteliers vary their ADR significantly by day of week to take advantage of inelastic demand on certain days, with the later chart revealing that in July last year the typical Saturday saw an ADR of £162, some £50 higher than the average rate being charged on a Sunday night.



Again looking at what this means for RevPAR we find that in most recent months the strongest returns are found on Saturdays, especially in the summer, while in winter months Tuesdays and Wednesdays come a close second.



4 VISITOR MARKETS AND MARKET TRENDS

KEY FINDINGS

- Oxfordshire evokes rich associations in people's minds. Consumer research[2] shows Oxfordshire is predominantly associated with history and heritage; it is also renowned as a centre for museums and galleries with a vibrant arts and culture scene. As a global icon, and the county's most visited destination, the city of Oxford is likely to be the driver of these top-of-mind associations.
- However, the same research also suggests people's idea of the county is more than its famous city with over half of people mentioning its attractive countryside as a reason to visit. There are opportunities to build on strengths in the county's profile for the active outdoors, its gardens and its food and drink offer, with around a third of people mentioning these as motivations to visit. More recessive features of Oxfordshire's reputation – cited by approximately only a quarter of respondents – focus on it being easy to get to and as a place to visit for shopping, as well as for events and festivals.
- Alongside Oxford, people's experiences of the county are most likely to be shaped by visits to Henley-on-Thames, Burford and Bicester.
- Profile data shows that couples make up 45% of all visitor groups to Oxfordshire with families and groups of friends being the next most popular.
- Visitors are most likely to arrive in Oxfordshire for a day trip. Short stays (overnight stays of less than a week) are undertaken by 40% of visitors, while long stays of more than a week are mentioned by only 6%.
- Visiting a pub, tearoom or restaurant alongside visiting attractions are the most popular activities undertaken by visitors (among almost two-thirds). 44% had visited a cultural venue or museum and a third had toured around the county. Around a quarter of people mentioned they had either been walking, attended an event or went on a special shopping trip when visiting the county.
- VisitEngland research among visitors to Oxford[3] found that three-quarters of people who had taken a recent trip to the city highly rated its history and heritage, cultural offer and the quality of food and drink. However, areas where Oxford performed less positively versus other GB cities and large

[2] Experience Oxfordshire Consumer Survey (March 2023)
[3] Oxford Destination Report, VisitEngland (2018)

town were shopping and also transport connectivity – both in terms of reaching the city and then being able to navigate it easily once there. These themes are echoed in the more recent research at a county level by Experience Oxfordshire. Visitors to Oxford also registered lower trip satisfaction and were less likely to make a return trip when benchmarked versus other GB cities and large towns.

- Equivalent analysis for the Cotswolds (covering the entire geography, a separate analysis of the Oxfordshire Cotswolds is not available) demonstrates the strength of its reputation as a destination with a high-quality natural environment. It also performed positively on factors including history and heritage, food and drink, as well as being seen as welcoming and friendly. Trip satisfaction was on a par with the GB rural/countryside average with likelihood to return being slightly ahead of benchmark levels. This suggests that leveraging key assets from the Oxfordshire Cotswolds in visitor marketing may help to enhance the county's overall reputation as a destination with a compelling countryside experience.
- Domestic visitor profile data for Oxford shows the city under-indexes on visitors aged 45+. In the context of Oxford's renown as a university town this may be unsurprising. Nevertheless, with the trend for an ageing population, it will be important to understand any potential barriers to visiting for more mature cohorts. Given Oxford's comparatively weaker reputation for good transport links relative to other GB cities, this may suggest an issue with access for older visitors and one which would merit exploration. Nevertheless, Oxford is a well-liked city among Baby Boomers polled by YouGov, who score the destination more highly than either Millennials or Generation X cohorts. Therefore, Oxford appears to be in a good position to appeal to mature visitors if it can reach them with a meaningful proposition.
- The age profile of domestic visitors to the Cotswolds aligns with the GB destination average (45% aged between 18-44 and 55% aged 45+). Therefore, the Oxfordshire Cotswolds is likely well-placed to attract mature visitors to arrive and explore the wider county.
- Analysis of best prospect visitor segments for Oxfordshire suggests six target groups (three UK domestic and three international) who are well placed to deliver value growth for the county. By lifestage, there are potential growth opportunities among a middle-aged and older cohort in the UK and internationally who could be attracted by the county's landscapes, heritage and cultural offer; UK and international visitors under 35 travelling without children searching for action-packed breaks full of novel experiences; UK-based families looking for family-friendly learning experiences and outdoor activities; plus adult groups aged under 40 from China and GCC markets attracted by high-end experiences.
- Business tourism is also a significant opportunity for Oxfordshire given its international profile in education, technology and science. A study by Oxford Brookes Business School in 2019 found that 'sustainable growth in the business visitor economy is both attainable and desirable' for Oxfordshire. Investment in a new multi-purpose venue was highlighted as central to achieving significant growth for business tourism with estimates that this type of venue could annually attract more than 350,000 visitors and value of up to £8m.

- The travel market is currently characterised by uncertainty as a result of pandemic disruption, economic headwinds and geopolitical instability. This has heightened people's focus on their short-term needs and immediate circumstances, putting pressure on businesses to accommodate last minute changes and cancellations. Nevertheless, trends are emerging that are likely to have a medium to long-term impact on visitor behaviour. In the case of a growing desire to engage with the outdoors for wellbeing and the increased adoption of digital technology in researching and booking trips, the pandemic can be seen to have had a catalysing effect. Economic constraints are encouraging people to think about destinations closer to home and to seek value wherever possible. People's consciousness of their environmental impact also continues to grow. However, a lag between thought and action remains without the widespread and consistent adoption of sustainable practice among both businesses and consumers.
- Research among the county's residents by Experience Oxfordshire in March 2023 shows an almost universal appreciation of the importance of tourism to the health of the county's wider economy (95% saying tourism is 'important/very important'). Just under a quarter of residents also believe that tourism has a positive impact on their quality of life. However, a similar number believe the reverse with traffic congestion and concern about environmental impacts being key areas of concern. Therefore, addressing residents' concerns in these areas will be important in encouraging their support and advocacy for the future growth of tourism.

VISITOR EXPERIENCES AND PERCEPTIONS OF OXFORD AND THE COTSWOLDS

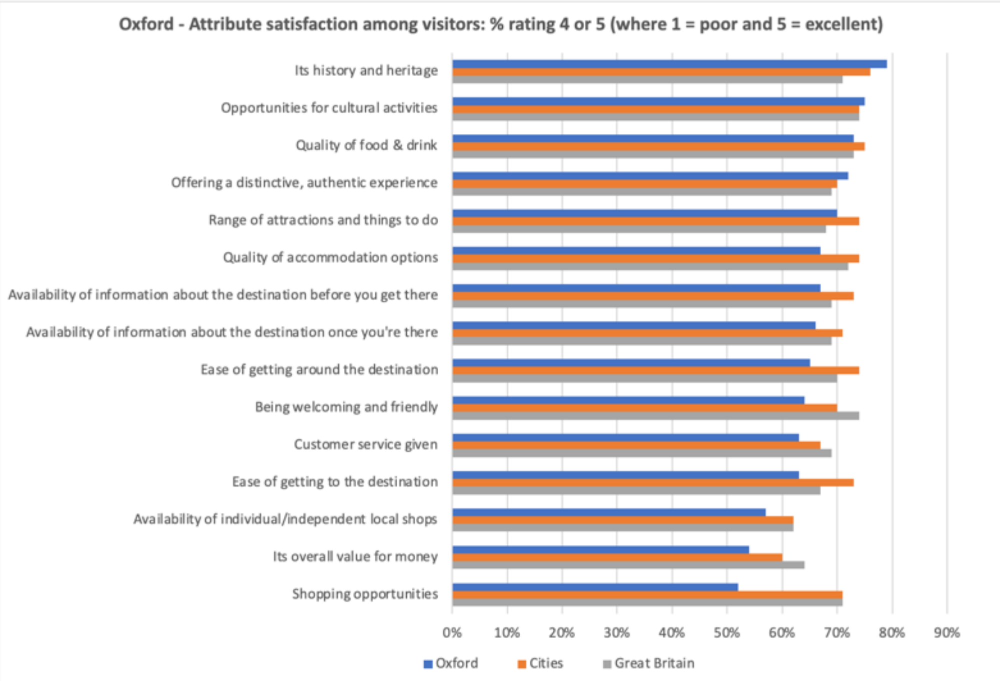
Oxford

As the most visited destination within Oxfordshire, how visitors experience the city of Oxford is key to shaping perceptions of the wider county. Therefore, we have explored the strength of the Oxford experience to understand its likely effect on how people perceive the county.

Data is taken from VisitEngland research among GB domestic visitors and assesses different elements of their experience across the period April 2015 to January 2018. Oxford is benchmarked against other GB cities and towns included in the study, as well as a broader GB destination average. Results are shown in the graphic below:

Three-quarters rated Oxford 4 or 5 for 'quality of food and drink', 'opportunities for cultural activities' and 'history and heritage', with this being akin to or better than the case for GB cities more widely.

However, on a less upbeat note Oxford fell short of the performance of the typical GB city across many of the attributes, with this particularly the case for 'shopping opportunities', 'ease of getting to the destination' and 'ease of getting around the destination'. The city also scores below other GB destinations on the friendliness of its welcome.

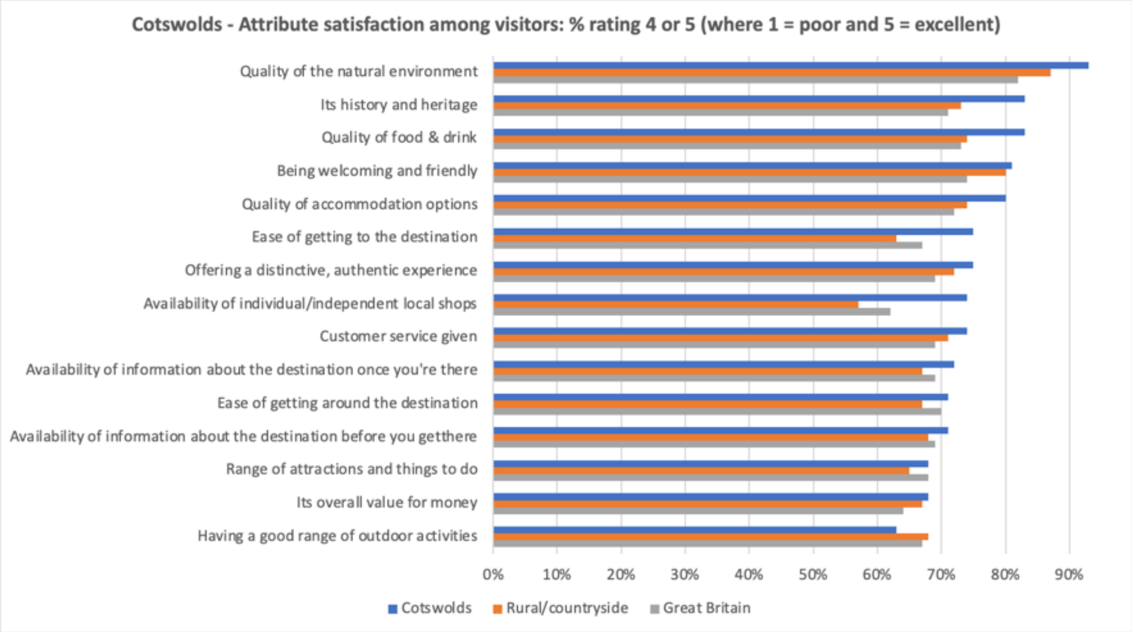


The Cotswolds

The same study also included the Cotswolds. Responses are shown below for the whole of the Cotswolds area (it not being possible to split out the Oxfordshire Cotswolds separately) and benchmarked versus a rural countryside average and the GB destination average:

Over 90% of visitors rated the Cotswolds highly for its 'quality of the natural environment'. While more than four in five showed strong satisfaction with its 'history and heritage', 'quality of food and drink' and its 'being welcoming and friendly' with 'quality accommodation options'.

There may be an opportunity to create a positive halo for Oxfordshire and enhance its reputation around the natural environment by showcasing the landscapes and rural assets of the Oxfordshire Cotswolds in destination marketing for the county.



This research also asked GB domestic visitors about their likelihood to consider visiting selected destinations in the future and, if they had visited one these key destinations, to rate their satisfaction with their last trip and likelihood to return. Both Oxford and the Cotswolds were included in these questions.

Results are shown in the table below. Oxford is benchmarked against other GB cities large and towns; the Cotswolds is shown in the context of the rural/countryside average. The GB average is shown as a benchmark for both destinations:

Key Measures, Oxford & Cotswolds Destination Reports (2018)

	Oxford	*GB City/Large Town Avg.*	Cotswolds	*GB Rural/ Countryside Avg.*	*GB Destination Avg.*
Loyalists *I often/sometimes take holidays there and intend to in the next year/couple of years*	**13%**	*18%*	**20%**	*17%*	*17%*
Considerers *I have been/never been to this destination before but would like to in the future*	**51%**	*49%*	**57%**	*49%*	*48%*
Rejecters *I have been/never been to this destination before and am not likely to do so in the future*	**29%**	*24%*	**15%**	*27%*	*25%*
Satisfaction *Among recent visitors: % rating 4 or 5 where '5 is excellent and 1 is poor''*	**39%**	*48%*	**52%**	*53%*	*49%*
Likelihood to return *Among recent visitors: score out of 10 where 10 is 'definitely' and 1 is 'definitely not'*	**7.9**	*8.4*	**8.5**	*8.3*	*8.4*

Source: VisitEngland

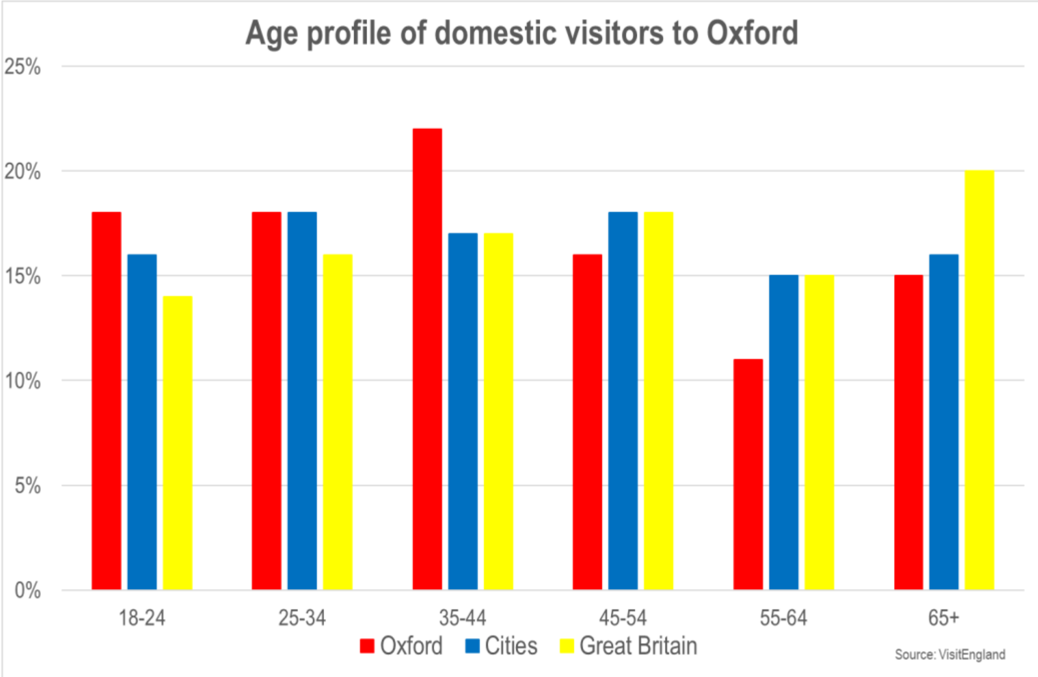
Scores for Oxford showed a higher-than-average number of 'rejecters' and lower levels of satisfaction, with visitors slightly less likely to make a return trip in comparison to other GB cities/large towns and the overall GB destination average. The Cotswolds performed relatively strongly in terms of 'loyalist' and 'considerers' and in its ability to encourage return visits.

The implications for Oxfordshire as a destination brand are around demonstrating the diversity of its offer and leveraging the strengths of its key assets. Oxford stands out as an historic and cultural centre, aspects which are unique and compelling for visitors. However, research indicates the need to investigate and address perceptions around the city's retail offer and transport links in particular. Leveraging the Oxfordshire Cotswolds profile as a high quality and welcoming countryside experience is likely to pay dividends in terms of deepening people's understanding of the breadth of the county's visitor offer. Establishing a common thread that links all Oxfordshire experiences will be key.

Visitor age profile

A study undertaken by the National Tourist Boards during the middle part of the last decade provides an insight into the age profile of visitors to different destinations across Great Britain, one of which was Oxford.

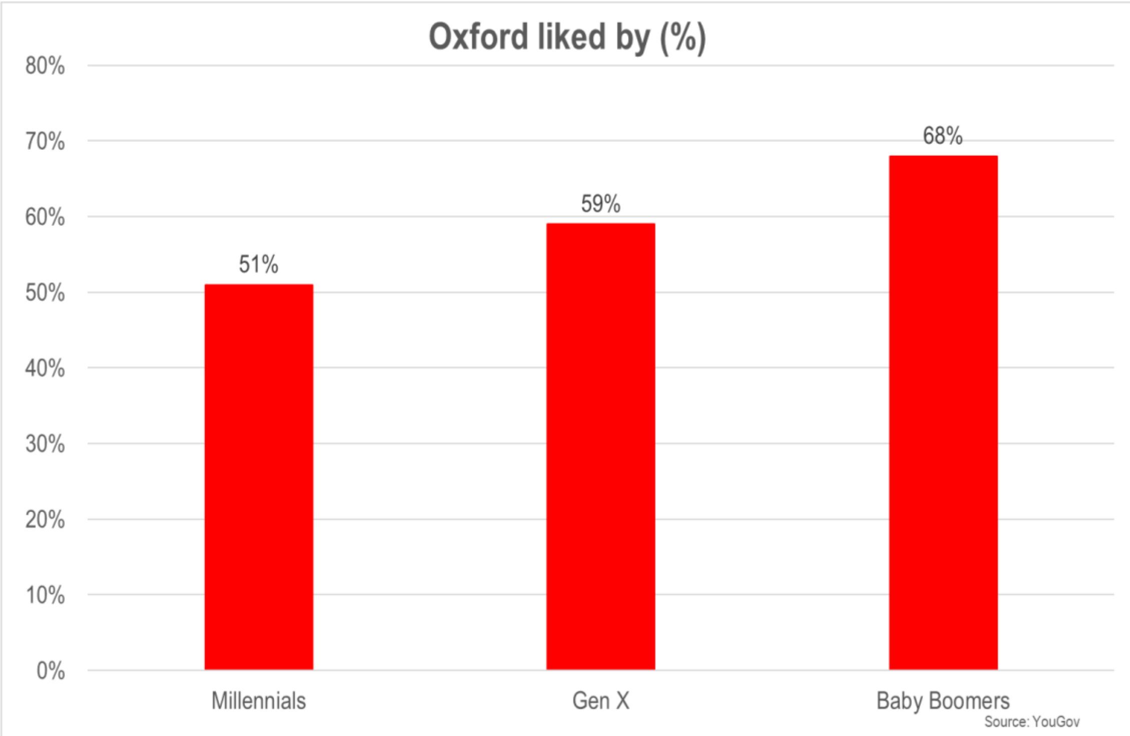
We can note from the following chart that, in comparison with the average city destination, Oxford under-indexes on visits among those in older cohorts and conversely has a slightly younger visitor profile. These results may be unsurprising given Oxford's profile as a centre for study. However, whilst it is important to continue to attract younger visitors and build a lifelong relationship with them, understanding the levers which will attract mature visitors is a key consideration given the ageing trend in the wider population. Therefore, further investigation is needed to understand what may be driving this result and possible inhibiting factors for more mature visitors. Oxford's comparatively weaker profile for good transport links may indicate perceived issues around accessibility; a hypothesis that may deserve exploration.



As a point of comparison, the same age analysis is available for visitors to the Cotswolds. Results show visitor age is largely in alignment with the GB destination average with 45% of adult domestic visitors aged between 18 and 44 years and 55% aged 45 years or over. Therefore, the Oxfordshire Cotswolds may be well positioned to attract more mature visitors to the county with the opportunity being to encourage them to explore Oxfordshire more widely.

Although data shows a relatively younger visitor profile for Oxford, we can observe from YouGov data that positivity for Oxford actually increases with age, with half of millennials but almost seven-in-ten of those classified as Baby Boomers having a positive opinion. Therefore, Oxford has a good perceptual base to build on amongst more mature visitors, if it can reach them with a meaningful proposition.

Overall Oxford was ranked 5th out of 48 places across the UK that are included in the study, behind York, Edinburgh, London and Cambridge. The Cotswolds is not included in the study.



POTENTIAL GROWTH MARKETS

Analysis of domestic and international visitor segments suggests six visitor types who, alongside the business tourism market, can offer value growth for Oxfordshire. These best prospect segments have been identified on the basis of their likelihood to deliver value via longer overnight stays and engagement with a range of activities across the county.

UK	WHO THEY ARE AND WHAT THEY WANT	INTERNATIONAL	WHO THEY ARE AND WHAT THEY WANT
Country-Loving Traditionalists 	• Couples aged 50+ travelling without children • Mid-affluence living in South East England • Countryside breaks • Heritage, outdoors & experiencing local culture – including food & drink	**Explorers** 	• Typically 45+ travelling without children • Largest segment in Germany & Netherlands. Significant in France, Canada, Australia & USA • Mid-affluence; overseas trips a priority • Like a relaxed pace in small cities/countryside • Heritage, outdoors & experiencing local culture – including food & drink
Free & Easy Mini-Breakers 	• Under 35s travelling without children • Willing to spend on trips • City breaks • Trips packed with activities & experiences • Events, culture, boutique accommodation, quality food & drink • Public transport & good digital connectivity	**Buzzseekers** 	• Under 35s travelling without children • Largest segment in USA, Canada, Australia & France • Frequent travellers & will spend on experiences • Cities, plus rural locations that offer 'only here' experiences (e.g. active outdoors, events) • Boutique accommodation, quality food & drink • Public transport & good digital connectivity
Aspirational Family Fun 	• Families with school-aged children • Affluent, living in London & SE • City breaks – but rural locations with outdoors activities also attractive • Family-friendly activities – especially entertainment, culture & events	**Culture-Buffs** 	• Under 40, travelling in social groups (no children) • China & GCC • Travel trade a key intermediary • Image & brand-conscious – travel is a status symbol • Cities with 'kudos' – London+ trips an opportunity • 'Iconic' experiences to gain social media status

UK	WHO THEY ARE AND WHAT THEY WANT	INTERNATIONAL	WHO THEY ARE AND WHAT THEY WANT
Business Tourism – UK & International 	• Non-discretionary business meetings • Corporate meetings and events • Driven by Oxfordshire's significant global profile in academia, technology & the life-sciences • A compelling and varied leisure offer		

Source: UK segments via VisitEngland, international segments via VisitBritain

Oxfordshire's Business Visitor Economy

A 2019 study by Oxford Brookes Business School into the Business Visitor Economy 'found evidence to suggest that the region is underperforming (compared to other regions); not achieving its potential and is turning away business'. The study concluded that Oxfordshire has the opportunity to grow the business visitor economy, noting that a better use of existing facilities would make a positive contribution in the short to medium-term and that significant growth would only be achievable through investment in new facilities – including a new multi-purpose venue – for meetings, conferences and events. The study estimated that such a new venue could attract approximately 350,000 visitors annually and generate revenue in the range of £7m-8m. The report outlined the need for partnership and collaboration (including the involvement of the private sector) around a shared vision for the business visitor economy in Oxfordshire to drive effective planning and long-term investment in order to realise the economic potential offered by this market.

HOW RESIDENTS VIEW THE VISITOR ECONOMY

Research shows that 95% of Oxfordshire residents recognise the importance of the visitor economy to the county's wider economy. However, there is a polarised response to how residents view the impact of tourism on their quality of life. While 23% of residents believe tourism delivers a positive contribution to their quality of life, 26% believe it results in a negative effect. Traffic congestion (61%) and environmental impacts (32%) are seen as the main negative consequences of tourism within the county.[4]

[4] Experience Oxfordshire, Residents' Perceptions Research (March 2023)

TRENDS

We have identified six macro trends likely to influence travel behaviours in the medium in the long-term and with implications for the development and marketing of Oxfordshire as a destination.

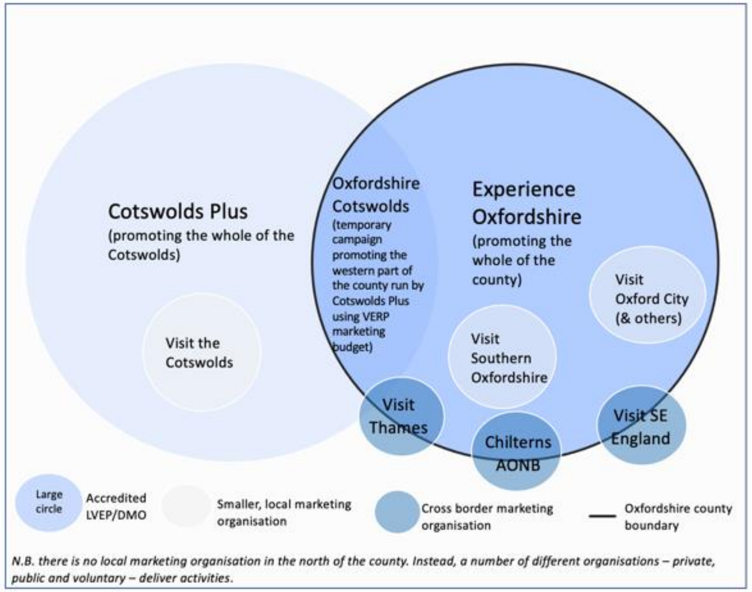
TREND	DETAILS	EMERGING IMPLICATIONS FOR OXFORDSHIRE
#1: The Certainty of Uncertainty 	• Pandemic, economic and an unstable geopolitical environment have had an **unprecedented effect** on tourism demand and supply • Visitor choices and behaviours will respond to global and national upsets affecting destination choice and activities, some changes may stick but it's likely that **fundamental motivations** will remain the same	• Heightened consumer expectation of **flexibility** in booking and **last-minute decision-making** that continues to place risks on businesses • Plan for a **multi-speed recovery** of inbound markets with near European and north American markets rebounding at a faster pace than east Asia
#2: Home Front 	• **More time at home**, with ongoing WFH, means some people have invested in their homes rather than take breaks, whereas others may be desperate to get out • The line between being at work and not is **increasingly blurred** with many continuing to work while on holiday • **Decrease in commuting** has impacted the buoyancy of city centres	• The **quality of accommodation** needs to be as good as, if not better than, at home: high speed broadband provision and workspaces important in accommodation • **Towns and villages** may be **more vibrant** as visitors seek to live like a 'local' on a trip • Showcase what is **distinctive** about Oxfordshire so visitors can get 'under its skin'
#3: Fresh Adventures in the Fresh Air 	• **Increased appeal** of the outdoors evident during the pandemic and set to continue • Greater awareness of **wellbeing benefits** from being outdoors. Gentle strolls, off-road cycling, nature photography - just some of the outdoor pursuits the pandemic encouraged	• Greater demand for **active** and **outdoor** experiences • **Raise awareness** of Oxfordshire's extensive outdoor assets – especially green routes – and encourage people to **experience more** of the destination outside of honeypots

TREND	DETAILS	EMERGING IMPLICATIONS FOR OXFORDSHIRE
#4: All About Value 	• While price matters, **value** for money and the **quality** and **distinctiveness** of the destination's offer are also crucial to justify people 'investing' in a trip • Inflation is at a high and the cost of living is **eroding** disposable income. The cost of travel is also set to increase • A tight labour market and inflation will put **upward pressure** on wage/business costs	• Domestic visitors may be looking to travel less and choose **destinations closer to home** – wanting to discover something new/different in their 'backyard' • Discretionary spend may be **reduced** so more visits may not result in more value • **Low £ rate** may encourage international visitors if they perceive a compelling reason to visit
#5: Going Digital 	• An **accelerated** the use of digital during the pandemic; changes from video conferencing to booking flexibly will persist and evolve • Technology supports **accessibility** but a potential **barrier** for those who do not feel digitally 'savvy' • 'Effective use' – driven by **benefits**, rather than features – will be the measure success • More use of digital content, booking etc in destination on mobile devices	• Online planning and booking enables visitors to discover more about a destination and build an itinerary, so pre-visit **digital touchpoints are key** • Fast, reliable **internet access** is vital for businesses to be seen as competitive • **Hybrid business events** may continue and soften physical attendance, but widening the reach for future in-person events
#6: Changing Behaviours in a Changing Climate 	• The UK Government has set a target to achieve **Net Zero** carbon emissions by 2050 • Tourism is a contributor to climate change and will be required to **reduce its impacts**. Despite acceptance of its importance this is yet to translate to widespread, consistent changes in business practice or consumer choices	• Nationally, new strategies, policies, funding and practices are being developed to guide and support a **coherent approach** • Responses will be required by the **destination** (target markets, transport etc), **businesses** (waste and energy reduction) and **visitors** (travel, behaviours, choices such as locally produced food & drink)

5 MARKETING REVIEW

SUMMARY

- Travel media sites tend to feature Oxford and The Cotswolds prominently on their websites as popular destinations to visit. Entries relating to the county are harder to find.
- Where Oxfordshire does have presence on travel media sites, it tends to be via blogs. Oxford City (as the 'city of dreaming spires'), Blenheim Palace and Bicester Village tend to feature as the county's highlight experiences within those blogs, particularly those aimed at an international audience. The county's frequent appearances as a filming location in major films such as Harry Potter and popular TV programmes such as Downton Abbey, are also used as a hook.
- Oxford city and parts of Oxfordshire (namely Blenheim Palace and some of the Cotswold villages) are common features in tour operators' day trip itineraries from London. Popular itineraries see them packaged with Stratford-upon-Avon, Windsor Castle, Warwick Castle, Stonehenge and Cambridge University.
- Oxfordshire's official destination marketing is delivered by its accredited LVEP Experience Oxfordshire which is the trading arm of the parent charity, the Experience Oxfordshire Charitable Trust, a not for profit public and private sector partnership organisation covering the whole of the county. Cotswolds Plus, as a local authority-led LVEP for the Cotswolds, leads and coordinates the marketing of the Cotswolds as a visitor destination. So, there is some overlap in the official marketing of the western part of the county which falls both in Oxfordshire (Experience Oxfordshire) and in the popular regional tourism destination of the Cotswolds (Cotswolds Plus). The marketing outputs from these two organisations at times seem to unnecessarily complicate the visitor experience and journey and in doing so, dilute the impact of their activity. For example the part of Oxfordshire that falls within the Cotswolds is promoted via the Cotswolds Plus channels, its sub site the Oxfordshire



Cotswolds (and associated social media channels) and via Experience Oxfordshire. From a user perspective, there is a sense that marketing activity is delivered within a political geographic context rather than designed with a natural visitor journey in mind. This is complicated further when factoring in the several other unofficial platforms that are also promoting various parts of the destination. See diagram to the right.

- That being said, the content being created and distributed by Experience Oxfordshire and Cotswolds Plus is generally engaging and of a high quality. This is reflected in the three recent marketing campaigns run as part of the Visitor Economy Renaissance Programme (VERP), all of which delivered impressive results.

TRAVEL MEDIA

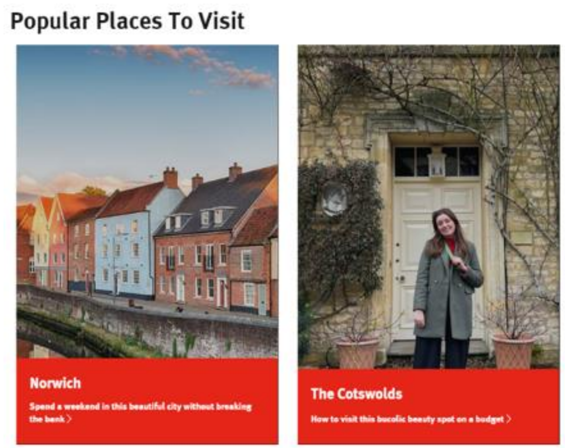
We have looked at a range of travel media sites to see how they are promoting Oxfordshire and what key messages they are using. Our findings are recorded below.

Lonely Planet

- Centred around Oxford as ‘the prime visitor destination’ but with the surrounding towns and countryside offering ‘excellent day trip options’ and ‘stop off destinations for travellers heading west into the Cotswolds’. Blenheim is featured as the county’s ‘major highlight’

Visit England

- Oxford (peruse the city of dreaming spires) and the Cotswolds (how to visit this bucolic beauty spot on a budget) and are featured prominently on VE Places to Visit home page – see image right.
- Blogs talk about the ‘dreamlike quality’ of the county, walking through parks, gardens and Cotswolds villages, and shopping at Bicester Village. It has a somewhat elitist positioning with a *‘jaunt to Henley-on-Thames to see varsity teams row in posh regattas’* featured as a top thing to do.



Visit Britain

- Talks about Oxford rather than Oxfordshire, leading with its location from London ‘just an hour by train’. Oxford is featured as a ‘popular’ city

- Predominantly heritage, the university and quintessential Englishness e.g. ‘cobbled lanes and canals’, supplemented by Harry Potter, shopping (Bicester Village), food and its location ‘on the doorstep to the Chilterns, the Cotswolds and the baroque country pile of Blenheim Palace.’
- The Cotswolds is listed as a ‘popular’ countryside destination (Oxfordshire is not)
- Blenheim Palace features more prominently and frequently across the site than the overall destination
- Bicester Village features as one of Britain’s five most iconic shopping destinations outside of London

Other

- Expedia gives a comprehensive overview of the county summed up in its final sentence…

> “Oxfordshire will peak your interest in the history of academia, while offering a taste of blissful rural England.” Expedia

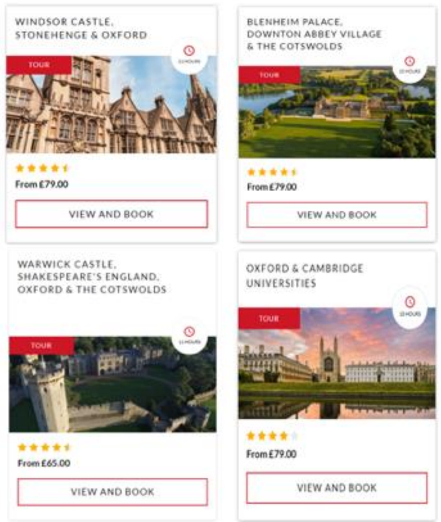
- Rough Guides packages Oxford with the Cotswolds and Stratford-upon-Avon
- Tripadvisor presents Oxfordshire as a destination but with no associated narrative, unlike Oxford which is hung on ‘the city of dreaming spires’ idea. According to Tripadvisor, the categories that Oxfordshire is great for, are film tours, bars, historical tours, the great outdoors, cultural tours and food & drink.

TRAVEL TRADE

Day trips from London

We have looked at some of the most popular tour operators offering day trips from London e.g. Evan Evans Tours and Golden Tours. Oxford city and parts of Oxfordshire are a common feature in several of their day trip itineraries which include:

- Windsor Castle, Stonehenge and Oxford
- Oxford and Cambridge Universities
- Blenheim Palace, Downton Abbey Village and the Cotswolds
- Warwick Castle, Shakespeare's England, Oxford and the Cotswolds
- Assuming that the visit to Oxfordshire as part of one of these trips lasted for 3+ hours, the visit will be counted within the 2016 International Passenger Survey inbound day visits data which showed that Oxfordshire saw around half a million day visits by overseas visitors that year.



Overnight tour packages

According to Tour Radar, Oxford is included in 107 overnight tour packages, ranging from 2 to 38 days in length. Approximately 90% are fully guided group tours, with 60% being categorised as 'in-depth cultural'. June is the month with the largest number of tour departures.

REVIEW OF OXFORDSHIRE DMO CHANNELS

The following tables provide a snapshot of some of the key marketing channels used by Experience Oxfordshire and Cotswolds Plus

Experience Oxfordshire	
Positioning – *Oxfordshire is a wonderful place to visit. With amazing architecture and history, beautiful villages, traditional market towns and hidden treasures there is so much to explore. It is home to famous literary figures, unique traditions and the city is famous for its dreaming spires skyline. Explore this website to discover more about Oxfordshire and what it can offer whatever the weather.*	
Markets – young adult groups, families	
Key themes – museums/culture/heritage, shopping, film & TV	
Experience Oxfordshire Website	Experience Oxfordshire typically gets annual page views of about 2.2m. Its visitors are split 68% UK, 32% international. There is a good use of video showcasing the visitor offer and diversity of experiences and there are ten nicely put together itineraries giving a flavour for destination wide activities e.g. Time Together, Fresh Air and Freedom, Arts & Culture. However, with nine headings, and various thematic subheadings, the navigation is quite complex meaning some of that content can be quite difficult to find. It has a range of bookable products including tours, attraction tickets, extensive events listings, and an integrated venue finder.
Social Media Channels Facebook – 9,600 followers Instagram – 8,200followers Twitter – 13,100 followers Linked In – 2,557 followers	Facebook – 'experience Oxfordshire and discover amazing architecture, beautiful villages and hidden treasure.' Regular posting but low number of followers and engagement Instagram – 'your official photo guide to #oxford and #oxfordshire' Fairly low number of followers and engagement Twitter – 'The Oxford & Oxfordshire Experts (Official DMO). We bring you updates from around the county so you can find your favourite spots to visit!'

	High engagement on Linked In.
Other	772k enewsletters sent out per year EO also operates residents reports, business reports and consumer surveys.

Cotswolds Plus	
Positioning – *Welcome to the Cotswolds, a very special, very wonderful place. A short break or even an extended holiday in the Cotswolds will leave you wanting more and you'll be booking your next Cotswolds holiday as soon as you return home!* *The Cotswolds covers a huge area – almost 800 square miles – and runs through five counties (Gloucestershire, Oxfordshire, Warwickshire, Wiltshire and Worcestershire). One of the delights of visiting the Cotswolds is exploring the different areas, each with its own identity, yet all with those defining Cotswold features: golden stone and rolling hills, the 'wolds'.*	
Markets – not entirely clear but seems to be targeting a more mature audience, couples	
Key themes – countryside (walking), heritage, food and drink (artisan, farmers' markets, festivals)	
Cotswolds Plus Website	The site promotes the whole of the Cotswolds ('almost 800 sq. miles' and running through five counties – Gloucestershire, Oxfordshire, Warwickshire, Wiltshire and Worcestershire). Throughout the site, the quality of images used is high with a good mix of attractions, landscapes, accommodation and townscapes, although there are very few visitors featured in the images and the use of video is limited which means it tends to lack some engagement with the user. Its navigation is simple but effective arranged by: • Inspire me • Do

	• Stay • Eat & Drink • What's On There is an integrated Booking.com availability search function for some accommodation providers but generally there is little bookable product featured on the website. There are a number of member ads featured throughout the site, some of which have quite poor display quality compared to the rest of the site material. In 2022, the CP website had over 1.5m users. Visitation was consistent throughout the year with a slight peak in May and September. Users originate from UK (approx. 70%), US (15% - a large rise in 2022 compared with previous years) and Australia (1%). Domestically, London is by far the most popular place of origin (26%), followed by Birmingham (2%), Bristol (1.45%) and Cheltenham (1%).
Social Media Channels Facebook – 47,981 Twitter – 25,700 Instagram – 69,334	Domestically, Facebook and Instagram followers skew towards London residents. Internationally, followers tend to live in USA, Italy and Australia. Overall, social media content tends to profile individual members' news, products etc rather than having a destination focus. Facebook content is posted regularly, generally around heritage, market towns and gardens. It is focused on announcing (rather than sharing) members' news, events, developments etc. Again, visitors featuring in imagery are few and far between. Engagement is consistently pretty good. Instagram – regular posting, good engagement, nice use of story highlights by theme e.g. outdoors, heritage, food & drink. The strapline, 'welcome to the #Cotswolds , a very special, very wonderful place' could be more descriptive in terms of its positioning of the destination.

	Twitter – less content and lower engagement rates than on other social media channels. YouTube – content quite out of date.
Marketing reports: *Digital Health Check, 2021* *Travel Trade Involvement Business Survey, 2023*	A **Digital Health Check Report** carried out in 2021 showed that there is a lack of digital marketing knowledge, confidence and skills amongst Cotswold Tourism members. Whilst 100% of businesses do have a website and social media presence, only 37.6% of the 550 members have a marketing plan. It showed that Facebook is the preferred social media platform, followed by Instagram and then Twitter but that businesses are not posting regularly and very few are running social media ads regularly. Learning opportunities are in areas such as Search Engine Optimisation, social media, website management and auditing and putting together marketing emails. **The Travel Trade Involvement Business Survey** showed that despite a recognition of the opportunity offered by international markets for individuals (FITs), leisure and MICE, the key focus for CP members is the domestic market, with a strong bias towards holidays and direct business – 10% are targeting day trips and 86% want to be part of a domestic holiday itinerary. A very limited number of CP members currently work with the international travel trade (with only 16% having a trade ready product), and there is limited appetite for future engagement. Of the interest that does exist, OTAs are the preferred route to market – linked to a sense of 'quick wins' by reaching consumers through low effort engagement. 29% are actively targeting MICE business. There is also a low awareness of the Cotswold Tourism trade website resource and trade engagement at trade shows remains low. Future training and engagement techniques for working with the travel trade and distribution channels (including TXGB) may be helpful for the region. Some of the qualitative feedback from the travel trade showed that Oxford is seen as a base for Cotswolds tours, alongside Bath.

Other	There is a separate part of the main website branded as the Oxfordshire Cotswolds – this is a hangover site, funded by West Oxfordshire District Council when the main Cotswolds site (which was funded and influenced by the Gloucester LEP and County Council) was developed. There don't appear to be any long term plans for this site but according to Cotswolds Plus, it has been useful in the short term to apply for and use funds that have been secured via VERP (Oxlep funding). It positions Oxfordshire Cotswolds as: *Located within easy reach of London and Oxford, the stunning Oxfordshire Cotswolds is the perfect location for a short break or holiday with family or friends.* *There's so many things to do, with everything from historic houses like Blenheim Palace to animal attractions like Cotswolds Wildlife Park, as well as miles of unspoilt countryside to explore. What's more the area is dotted with towns and villages of honey-coloured stone including the bustling towns of Burford, Chipping Norton, Witney and Woodstock. Here you will find great shopping at local, independent retailers, and a wonderful choice for food and drink.* *There's a great choice of accommodation for your stay too, whether you prefer to relax in a hotel or inn, enjoy a homely bed & breakfast or make yourself at home in a delightful self-catering cottage.* *Don't forget to find out what's on in the Oxfordshire Cotswolds when you visit, there is a lively programme of year round events and not to be missed unique events which you won't find anywhere else.* *Be inspired to visit the Oxfordshire Cotswolds on your next short break or holiday and plan your trip today.* Cotswolds Plus also operates several social media channels under the Oxfordshire Cotswolds banner. Both the Oxfordshire Cotswolds Facebook and Twitter accounts have 6,000 followers.

OTHER CHANNELS

Elements of the region are also promoted via the following websites:

- Visit South East England – Run by Tourism South East, this is the official tourism website for South East England. It leads with the city of Oxford as 'the city of Dreaming spires' offering its visitors plenty of attractions. The wider county is described as being a key filming location in popular TV dramas such as Downton Abbey and films such as Harry Potter.
- Visit Southern Oxfordshire – South Oxford District Council's 'dedicated tourism website' includes a Google map which plots key tourism assets and a downloadable leaflet 'Visit Vale of White Horse Country'
- Visit North Oxfordshire – it is unclear who operates this website which dates back to 2017 (but with content published as recently as 2022), although it appears to be built by a US-based web designer. Content is blog-based but with no audience engagement. The homepage appears to have been hacked with content of an adult nature.
- Oxfordcity.co.uk – 'a destination guide and business directory' for Oxfordshire, managed and owned by Oxfinder, an Oxfordshire-based digital marketing agency.
- Visitthecotswolds.uk – 'the number one guide to exploring the Cotswolds'.. It has 225k followers on Instagram with high post engagement but it is unclear who is operating it.

REVIEW OF VISITOR ECONOMY RENAISSANCE PROGRAMME MARKETING CAMPAIGNS

OxLEP is currently managing and delivering the Visitor Economy Renaissance Programme (VERP), part of which sees the delivery of nine funded strategic marketing campaigns led by the county's two DMOs.

Three campaigns have been delivered to date. These are detailed in the below table along with their topline results (note, at the time of writing – March 23 - these are provisional results):

Campaign overview	Lead	Budget	Target markets	Channels	Results
"Hygge" Cosiness and conviviality - roaring fires, food and drink	Cotswolds Plus, Autumn 22	£10-£15k	▶ Pre-nesters ▶ Empty nesters ▶ Parents 'escaping' for a short break	▶ External advertising - Time Out ▶ Content Creator/influencers ▶ Promoted posts ▶ Website (Oxfordshire Cotswolds) ▶ Owned social media channels	New likes and follows – 1,082 Page views – 10,868 Clicks – 7,635 16 businesses included
"Made Here" Amazing things made locally (two strands - eshop and shop local)	Cotswolds Plus, Winter 22	£10-£15k	▶ London residents ▶ Local residents	▶ External advertising – Metro London, Oxford Mail ▶ Influencers, product testers ▶ Promoted posts ▶ Website and blogs	Reach – 609,842 New likes and follows – 2014 Page views – 13,258 Send volume – 141, 436 Impressions – 236,786 Clicks – 14,231 50 business included

Only in Oxfordshire Local food, drink and producers, accommodation, attractions, Christmas events, artisan crafts, shopping and celebrations "Only in Oxfordshire. Not far from home but a world away"	Experience Oxfordshire, Autumn/Winter 2022	£94k (total commission for three campaigns £290k)	▶ Off peak short breaks	▶ Campaign webpages (county and district level – Oxford, Cherwell, South, Vale and West) ▶ 3 minute campaign videos ▶ Five 2/3-day itineraries Paid digital ads (Facebook, Instagram, native Youtube, PPC and display) ▶ Organic social media ▶ Visitor newsletters ▶ Competitions ▶ Radio advertising (Jack FM) ▶ PR	Final results: Individuals engaged – 10.9m Video views – 440k Page views – 104k Competition entries – 24k 127 Oxfordshire-wide accommodation, food & drink, shop local and attraction providers

The campaigns took two different approaches. Experience Oxfordshire took a destination-wide approach, inspiring interest and engagement through itineraries, PR and driving traffic to a campaign landing page. Cotswolds Plus's aim was more around brand building and promotion of individual businesses.

The remaining six campaigns will be delivered between now and March 2024. They are:

- "Slow down, make time" – walking, cycling, natural world and sustainability. Led by Cotswold Tourism – Spring 2023

- Experiential Oxfordshire: Arts, Culture & Events – off peak short break focus on health and vitality, spiritual and physical (inc arts scene, outdoor exploration and activity), development of an online culture guide. Led by Experience Oxfordshire – Spring 2023
- “Insider Knowledge”: Hidden gems and local secrets. Led by Cotswolds Plus – Summer 2023
- “Our four-legged friends”: All about dogs and how dog friendly the businesses are. Led by Cotswolds Plus – Autumn 2023
- Experience the Oxfordshire Welcome, hospitality at its best – off peak short breaks in Oxfordshire, Christmas and New Year 23/24, Launch Welcome Oxfordshire Scheme. Led by Experience Oxfordshire – Autumn 2023
- “Out of the Ordinary”: Special, quirky and surprising – activities, attraction, accommodation. Led by Cotswolds Plus – Early 2024

OTHER RECENT OXFORDSHIRE CAMPAIGNS

In recent years, Experience Oxfordshire has also run the following marketing campaigns, securing £170k of funding for Escape the Everyday activity:

- Escape the Everyday in Oxfordshire (with VisitEngland)
- Escape the Everyday in Oxford (with VisitEngland)
- Inspirational Oxfordshire
- Rediscover Oxford
- Opening up Oxfordshire

6 PRODUCT ANALYSIS

KEY POINTS

- Oxfordshire has an impressive visitor offer. Oxford University, Blenheim Palace and The Cotswolds are world-famous attractions, leading the county's rich and distinct visitor experience. The heritage and beauty of the area are apparent throughout, whether exploring the city of Oxford, visiting grand, country estates, punting on the River Thames, touring picturesque, Cotswold villages, or rambling through rolling, English countryside. Beyond the prominent experiences of the university, country houses and quintessential English landscapes, there is a varied array of attractions and activities. At Henley-on-Thames there is a River and Rowing Museum, various boating activities and the famous Henley Royal Regatta. British motoring heritage is represented at a few Oxfordshire attractions, as well as at Silverstone and the British Motor Museum in nearby Northamptonshire and Warwickshire. A number of breweries, distilleries and vineyards offer tours, tastings and additional visitor experiences, including Shire horses, Alpacas and Food & Drink festivals. There is a relatively small but interesting selection of family attractions, including a crocodile zoo, fairy tale farm, Story Museum, Oxford Castle & Prison and Cotswold Wildlife Park. The choice of walking and cycling routes is extensive and includes sections of long distance and national trails. Some notable literary/film/tv connections provide further visitor interest and many themed walks/tours are available. They include Harry Potter, Alice in Wonderland and Inspector Morse (Oxford University and Oxford city), Downton Abbey (Bampton village), and Midsomer Murders (Wallingford).
- This product analysis is not intended to cover all visitor attractions and products. Rather we have focussed on distinctive features that Oxfordshire offers as a visitor destination. These are considered to be:
    - Oxford city
    - Oxfordshire country houses and gardens
    - Cotswolds towns & villages
    - Family attractions
    - Countryside, walking and cycling trails
    - Henley-on-Thames
    - British motoring heritage
    - Breweries, distilleries and vineyards

- Literary, film and TV connections

Additional experiences are:

- Shopping: Bicester Village is a popular designer shopping village with more than 150 luxury boutiques and attracting over 7 million visitors annually. Oxford Covered Market is a historic indoor market which has recently secured funding for redevelopment.
- Visual Arts: Modern Art Oxford and Oxfordshire Artweeks provide important contemporary art space and art celebration for the county.
- Events: Oxford Festival of the Arts; Truck music festival in Steventon; The Big Feastival at Alex James' Farm in Kingham; The Wilderness Festival.

- There are close to 1,000 visitor accommodation establishments in Oxfordshire, providing approximately 36,000 bedspaces. Three quarters of establishments and two thirds of total bedspaces are serviced. (Note: 2016 data)
- The accommodation product is of high quality, with many luxury hotels and an interesting range of choices, from grand, city centre hotels in Oxford, to riverside boutique hotels in Henley, and historic, characterful country inns in the Oxfordshire Cotswolds. Two, luxury destination resorts are Heythrop Park in Chipping Norton and Soho Farmhouse in Great Tew. Self-catering provision, again has an emphasis on luxury and Oxfordshire/Cotswold charm. Just over 3,000 active rentals are available through AirBnb, 42% of which are available full-time.
- There is a good supply of touring camping and caravanning sites in the county, mostly small rural sites. Three larger sites are Hardwick Parks, Standlake with 196 pitches and river watersports; Lincoln Farm Park, Standlake with 90 pitches, a leisure centre with 2 pools; Swiss Farm Touring and Camping, Henley with 125 pitches, a fishing lake and outdoor swimming pool. There is also some glamping provision through small glamping sites/clusters of glamping units, as well as individual shepherd's huts/safari/bell tents in various locations.
- Oxfordshire's conference and meeting provision is predominantly supplied through the county's larger hotels and Oxford University's colleges and venues. Largest capacities are: Oxford's New Theatre (1,785), The King's Centre (1,000), Sheldonian theatre (717), Oxford University Union (635), The Kassam Stadium (600), Oxford Town Hall (500).
- Some significant pipeline projects include: Great Wolf Lodge - an indoor water-part resort; Oxford United FC new stadium and conference facilities; Mullin Automotive Experience – classic car museum and luxury accommodation; Bicester Motion Masterplan – a major motor attraction development. The proposed Wilder Spaces development from Berkshire, Buckinghamshire and Oxfordshire Wildlife Trust (BBOWT) could also support Oxfordshire's credentials as a leader in sustainable tourism.

VISITOR ATTRACTIONS

A map of key attractions by theme can be found here showing the location of major assets and experiences.
https://www.google.com/maps/d/edit?mid=1PXGFMV6AUxxB4dQ0LzDCKjiwNfBhTbo&usp=sharing

In the following table, we present nine signature experiences/prominent themes for Oxfordshire, with their associated 'hero products'. They have been selected from a combination of listings on Experience Oxfordshire, Cotswolds.com, Visit South East England, Visit England, Trip Advisor, Timeout, Google, Culture Trip.

Oxfordshire's Visitor Attraction Offer

Signature experience/ Theme	Hero products	Location	Description	Trip Advisor Ranking -*Things to do in Oxfordshire*
Oxford City	University of Oxford	Oxford	World-famous university with 39 colleges and 5 private halls. Variety of tours available.	7
	Ashmolean Museum	Oxford	Oxford University's museum of art and archaeology. Britain's oldest public museum, with collections spanning continents and cultures. Rooftop bar & restaurant. (931,000 visits in 2019)	2
	Bodleian Library	Oxford	World-famous library, opened in 1602. Largest academic library system in the UK. (761,000 visits in 2019)	1
	Christ Church	Oxford	One of Oxford University's largest colleges and Oxford's Cathedral. Great Hall, Picture Gallery. Connections to Alice in Wonderland and Harry Potter.	8
	Oxford University Museum of Natural History	Oxford	Award-wining natural history museum. Striking Victorian neo-Gothic architecture. Café, shop. (792,000 visits in 2019)	6

	Pitt Rivers Museum	Oxford	Museum of archaeology and ethnography founded in 1884. Vast and otherworldly collection of treasures from around the world. Gift shop. (468,000 visits in 2019)	5
	Boating	Oxford	Punts, chauffeured punts, rowing boats and pedalos available for hire at Cherwell Boathouse and The Magdalen Bridge Boathouse. Cherwell Boathouse restaurant with inside and outside dining.	
	Christ Church Meadow	Oxford	Scenic park and 2-mile walk through meadows and along river bank.	11
	Port Meadow	Oxford	Large area (440 acres) of common land, alongside River Thames. SSSI.	23
				
Oxfordshire Country Houses and Gardens	Blenheim Palace	Woodstock	UNESCO World Heritage Site. Birthplace of Sir Winston Churchill. Magnificent Baroque Palace, 2,000 acres of 'Capability' Brown parkland, 90 acres of formal gardens, walled garden, tours, exhibitions, events, cafes, restaurants, shop. (985,000 visits in 2019)	4
	Broughton Castle	Banbury	14^{th} Century fortified manor house with moat. Gardens, tea room, gift shop.	16
	Grey's Court	Henley-on-Thames	14^{th} Century country house, series of walled gardens, tea room, shop, second-hand book shop. National Trust. (146,000 visits in 2019)	20

	Buscot Park & The Faringdon Collection	Faringdon	Family home of Lord Faringdon. Late 18th Century house, pleasure gardens, woodlands walks, art collection, tea room, shop. National Trust.	37
	Oxford Botanic Garden & Arboretum	Oxford	The UK's oldest botanic garden, founded in 1621. 5,000 different types of plant from around the world, walled garden, 7 display glasshouses. Harcourt Arboretum with 130 acres of rare or endangered trees. Shop. (174,000 visits in 2019)	18
	Waterperry Gardens	Waterperry	8 acres of ornamental gardens. Plant centre, garden shop, gift barn, gallery, rural life museum, teashop. Crafts and gardening courses.	40
	Rousham House & Gardens	Rousham, Woodstock	One of England's most important gardens, designed by William Kent (18th Century) and remaining unspoilt. Pleasure grounds and 3 walled gardens.	43
	Stonor Park	Henley-on-Thames	Stonor family residence. Historic House with 250 acres of grounds and gardens. 'Tumblestone Hollow' – a large adventure play area. Pizza hut, visitor centre, gift shop. Extensive events calendar.	66
	Kelmscott Manor	Kelmscott	Grade 1 Listed farmhouse built around 1600. Summer home of William Morris, with his collections of furniture, textiles, pictures, carpets, ceramics, metalwork.	*12 (things to do in Gloucestershire)*
	Chastleton House	Chastleton	Built in the early 1600s and owned by the same family until 1991, Chastleton is a superb example of Jacobean architecture both inside and out.	*5 (things to do in Moreton-in-Marsh)*





Cotswolds towns and villages	Cotswolds towns and villages	Cotswolds	Many beautiful, quintessentially English towns and villages such as Woodstock, Chipping Norton, Minster Lovell, Burford, Witney, Bampton, Kingham, Great Tew, Shilton.	



Family attractions	Cogges Manor Farm	Witney	13th century manor house and scheduled ancient monument. 17 acres of grounds, walled garden, farmyard, events, festivals, workshops, classes, café, shop. Downton Abbey film location.	68
	Cotswold Wildlife Park & Gardens	Burford	160 acres of parklands. Diverse collection of species. Hands-on animal experiences. Gardens.	*1 (things to do in the Cotswolds)*
	Oxford Castle & Prison	Oxford	Costumed guided tours, murder mystery events, ghost tour, escape room, shop.	246
	Crocodiles of the World	Brize Norton	UK's only crocodile zoo with more than 130 crocodiles, alligators and caimans.	10
	Fairytale Farm	Chipping Norton	Mix of fairy tale experiences, animals and adventure play. Café, shop, events. Fully accessible. (38,000 visits in 2019)	30

	The Story Museum	Oxford	Museum celebrating story telling around the world. Different story worlds. Talks, events, workshops, performances in the museum's studio theatre. Café, gift & book shop.	52
	Didcot Railway Centre	Didcot	Living museum set around 1932 engine shed, with collection of Great Western Railway steam locomotives, carriages, wagons, artefacts, steam train rides. (44,000 visits in 2019)	184
	Chinnor and Princes Risborough Railway	Chinnor	Steam railway alongside Chiltern Hills. 1-hour round trip. Station café, shop. Open Sundays, Bank holidays and selected Saturdays, March – October.	214
	Oxfordshire Museum	Woodstock	Museum with 11 galleries including history, archaeology, military and a dinosaur gallery. Café and gardens in central Woodstock.	# 2 things to do in Woodstock
				
Countryside, walking & cycling	The Chilterns AONB	Chilterns	Area of Outstanding Natural Beauty covering 324 square miles, including Henley and Wallingford, stretching north to Hitchin.	
	Cotswolds AONB	Cotswolds	Area of Outstanding Natural Beauty covering 800 square miles and 6 counties, including Oxfordshire.https://www.visitbritain.com/en/destinations/england/cotswolds	
	Oxfordshire & Cotswolds walks	Oxfordshire & Cotswolds	200+ walks available through the 'Oxfordshire Walks' app, including Chiltern Hills & Warburg Nature Reserve, Chimney Meadows, Uffington White Horse, Christmas Common, Windrush Valley, Badbury Hill, Rushy Common. Suggested	

			Cotswolds walks are: Burford, Woodstock & Blenheim Park, Chipping Norton, Swinbrook, Minster Lovell, Charlbury, Milton-under Wychwood, Spelsbury, Ascott-under-Wychwood, Stonesfield.	
	Thames Path National Trail	Cotswolds to London	Long distance National Trail (185 miles) from the source of the Thames in the Cotswolds to Woolwich, London. Links to a short, circular walk around Christ Church Meadow.	76
	The Ridgeway National Trail	Includes White Horse Hill to Thame	140km National Trail for walkers, cyclists and horse riders, stretching from Avebury in Wiltshire to Ivinghoe Beacon in Buckinghamshire. Oxfordshire section from White Horse Hill to Thame.	
	The Oxfordshire Way	Includes Henley	Walking route from Bourton-on-the-Water in Gloucestershire to Henley. Links the Heart of England Way with the Thames Path National Trail.	
	The Chiltern Way	Includes Ewelme	134-mile circular route with 3 optional extensions. Goes through Ewelme, Wallingford.	
	Hanson Way	Oxford to Didcot	14-mile route from Oxford to Didcot. On National Cycle Network NCN5. 50% traffic-free.	
	The Chilterns Cycleway	Includes Henley and Wallingford	170-mile circular route around the Chilterns Area of Outstanding Natural Beauty. Gateway towns include Henley and Wallingford. On-road route.	
	Cotswold Line National Cycle Route	Oxford to Worcester	Route following Cotswold Line railway from Oxford to Worcester. Cycle in one direction (short/long stages) and get the train home.	
	Thames Valley cycle route	Oxford to London	99-mile cycle route from central London to Oxford. NCN 4,5 and 51. 48% traffic-free. Includes some sections of the Thames Path National Trail (see above).	

				
Henley-on-Thames	River and Rowing Museum	Henley	5 permanent galleries exploring the River Thames, Rowing, Henley town, British artist John Piper, Wind in the Willows experience. Community gallery, shop, café.	51
	Boating	Henley	Boat trips down the Regatta course (Hobbs of Henley and Salter's Steamers). Punts, rowing boats canoes and motor boats for hire.	
	Henley Royal Regatta	Henley	5-day sporting spectacle. One of the longest established sporting events in the country.	127
	The Henley Distillery	Henley	See distillery section below.	63
				
British Motoring Heritage	Nuffield Place	Huntercombe, Henley	Home of William Morris, founder of the Morris Motor Company. National Trust property.	72
	Oxford Bus Museum	Long Hanborough, Witney	Tells the story of bus and coach travel around Oxfordshire over the last 130 years. There is also a Morris Motors Museum and a Historic Cycles collection	45
	Bicester Heritage	Bicester	UK's only hub for historic motoring excellence. Founded in 2013, now with 45 specialist automotive businesses. Sunday	73

			Scramble events have hundreds of classic and collector cars, special displays, family activities. Each Sunday Scramble attracts up to 10,000 visitors.	
	The Aston Martin Museum	Drayton St Leonard, Wallingford	Small museum displaying several Aston Martin cars alongside engineering displays and models. Pre-booked visits only.	79
	Silverstone Interactive Museum	Silverstone, Northamptonshire	Celebrates the past, present and future of Silverstone and British motor racing. Over 60 hands-on exhibits, iconic cars and bikes, Heritage Track Trail, café, shop. Located 7 miles from Oxfordshire border.	22 *(Things to do in Northamptonshire)*
	British Motor Museum	Gaydon, Warwickshire	World's largest collection of historic British cars. Museum, collections centre, exhibitions, events, café, shop. Located 7 miles from Oxfordshire border.	6 *(Things to do in Warwickshire)*
				
Breweries, distilleries and vineyards	Hook Norton Brewery	Hook Norton	Family-owned, Victorian Tower Brewery. Tours, Shire horses, shop, café, museum, meeting rooms.	3
	Oxford Artisan Distillery	Oxford	Craft distillery. Whisky tours, distillery tours, garden bar, shop.	13
	The Henley Distillery	Henley	Gin distillery. Tour and tasting, signature gin experience, shop.	63
	Tap Social Movement	Four venues across Oxfordshire	A social enterprise craft brewery, bakery and hospitality business that creates training and employment for people in prison and prison leavers. Varied events calendar	*2 (for nightlife in Oxford)*

	Loose Cannon Brewery	Abingdon	Brew 68 different beers spanning permanent, seasonal and specialist lines. Monthly brewery tours and weekend Taproom opening	*4 (Oxfordshire Breweries)*
	Lovibonds	Henley	Produce American-style craft beer. Run tasting room events	*5 (Oxfordshire Breweries)*
	Chiltern Valley Winery and Brewery	Hambleden, Henley	Vineyard, Winery, Brewery, Liqueur making, shop, tours & tastings, B&B accommodation and farmhouse lets.	9
	Brightwell Vineyard	Wallingford	16-acre vineyard, shop, tours and tastings. Thames Valley Food and Wine Festival – weekend event in June.	170
	Sunnyhill Vineyard	Horspath	Vineyard & Winery (weekends only), tours, tastings, Alpaca walking experience.	
	Freedom of the Press	Minster Lovell	A small 'urban winery on a hill in the Cotswolds'. Open for tours and tastings every Saturday July-August. Ad hoc events	
     				
Literary, film and TV connections (many tours available)	Harry Potter	Oxford University	The university was used for a number of scenes in the Harry Potter films, including the dining hall at Christ Church which was the Hogwarts Great Hall.	
	Alice in Wonderland	Christ Church	Lewis Carrol wrote Alice in Wonderland at Christ Church. Alice Liddell was the daughter of the Dean of Christ Church and inspired the character of Alice in Wonderland.	

	Inspector Morse	Oxford	A number of Oxford locations were used in the filming of Inspector Morse and spin-off programmes.	
	Downton Abbey	Bampton and Witney	Bampton village and Cogges Manor Farm in Witney were used as filming locations for Downton Abbey.	
	Midsomer Murders	Wallingford	Many villages in south Oxfordshire were used for the filming of Midsomer Murders, including Wallingford.	
	Lewis Carroll, JRR Tolkien, CS Lewis, Philip Pullman	Oxford University	All held various roles at Oxford University, with many aspects of the university and Oxford inspiring their works.	






Photos: experienceoxfordshire.org, oxfordpunting.co.uk, ox.ac.uk, nationaltrust.org.uk, cotswolds.com, cogges.org.uk, fairytalefarm.co.uk, didcotrailwaycentre.org.uk, visitthames.co.uk, chilternsaonb.org, ldwa.org.uk, experiencehenley.co.uk, austin-healey-club.co.uk, bicesterheritage.co.uk, britishmotormuseum.co.uk, chilternvalley.co.uk, sunnyhillvineyard.co.uk, chch.ac.uk

ADDITIONAL EXPERIENCES

Additional Oxfordshire experiences include:

Shopping

- Bicester Village is a popular designer shopping village with more than 150 luxury boutiques. It attracts over 7 million visitors per year and is now one of the UK's foremost retail destinations outside London. (Number 17 in Trip Advisor's Things to do in Oxfordshire.)

- Oxford Covered Market is an indoor market dating back to 1770s. There are over 50 specialist, independent traders selling traditional Oxford fare, food, drink, gifts, fashion, flowers etc. Oxford City Council has recently (February 2023) approved a £6.87 million masterplan package to revitalise the Market. (Number 195 in Trip Advisor's Things to do in Oxfordshire.)

Visual Arts

- Modern Art Oxford is a contemporary art space with changing exhibitions, artist commissions, events, shop and café. (Number 104 in Trip Advisor's Things to do in Oxfordshire.)
- Oxfordshire Artweeks is a 3-week celebration of the visual arts taking place each May in venues across the county. UK's oldest and largest open studios event.

Events

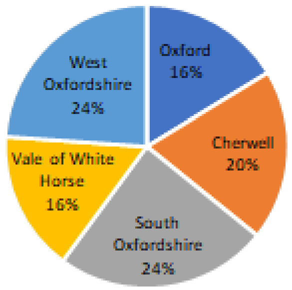
- Oxford Festival of the Arts is a 2-week festival founded by Magdalen College School, taking place in June each year. It attracts internationally renowned artists and performers in music, theatre, visual art, film, dance, literature, comedy.
- Truck Festival is an annual, independent music festival that takes place in July, at Hill Farm, Steventon. It is described as 'the Godfather of the small festival scene'.
- The Big Feastival is an August weekend family event combining food and music at Alex James' farm in Kingham. It attracts some of the UK's biggest artists and Michelin star chefs.

VISITOR ACCOMMODATION

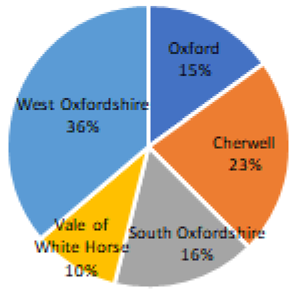
The most recent accommodation stock data available for Oxfordshire is from the national accommodation stock audit undertaken in 2016 by Visit England. Whilst this is now a number of years out-of-date, and there likely to have been new openings since, the audit still provides a useful general picture of accommodation supply in the county. Note: The Visit England data gave a very high figure for camping bedspaces in Cherwell (over 17,000 for just 15 campsites). Online research (Google, Pitchup.com, ukcampsites.co.uk) suggests that the correct numbers are likely to be nearer 4,000 bedspaces between around 30 campsites. Therefore, the analysis below uses these amended figures. Some summary points are:

- In 2016, there were close to 1,000 visitor accommodation establishments in Oxfordshire, with approximately 36,000 bedspaces.
- Three quarters of establishments and two thirds of total bedspaces were serviced.
- Oxford accounts for a third of the county's serviced bedspaces.
- West Oxfordshire has the highest share of non-serviced establishments (36%).
- Cherwell has the highest share of non-serviced bedspaces (32%) – through its camping & caravanning provision. Banbury in particular has many camping & caravan sites.
- A large proportion (75%) of Oxford's non-serviced bedspace supply is through 'other collective accommodation (hostel and university accommodation).
- Cherwell's non-serviced supply is predominantly tourist campsites.

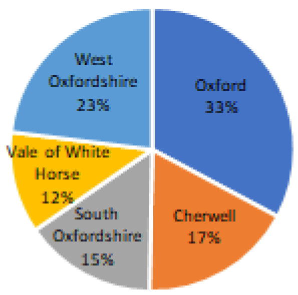
Oxfordshire serviced establishments



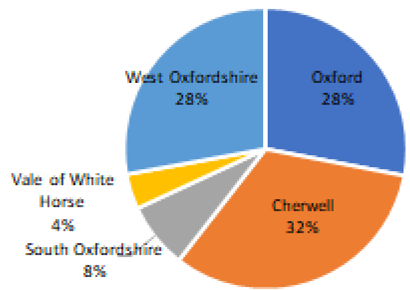
Oxfordshire non-serviced establishments



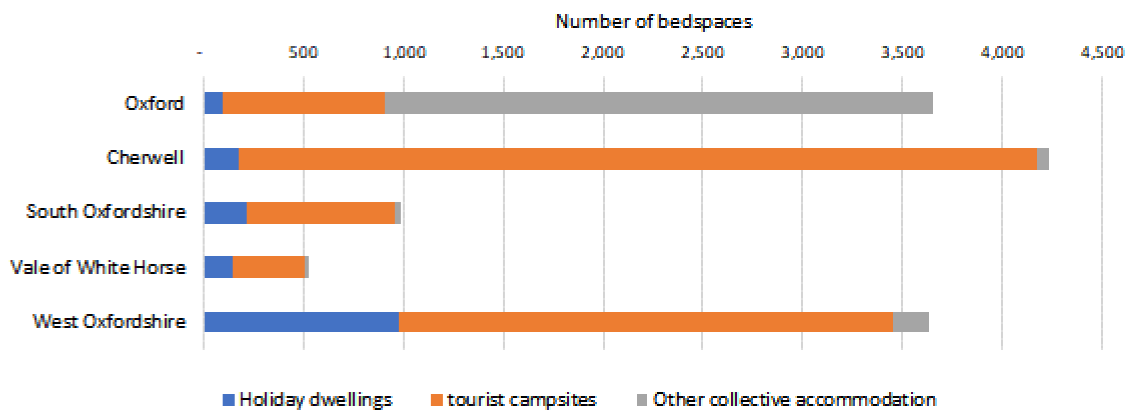
Oxfordshire serviced bedspaces



Oxfordshire non-serviced bedspaces



Oxfordshire non-serviced accommodation:bedspaces



Source: Visit England Accommodation Stock Audit 2016 (with amended figures for Cherwell campsite establishments and bedspaces)

Hotels

Online perusal of sites such as booking.com and Telegraph Travel, suggests that Oxfordshire's hotel product is of a high quality, with many appealing, luxury hotels to choose from. Of the 164 Oxfordshire hotels listed on booking.com, 46% are rated as 4 or 5 star, 21% 3-star, 32% 'unrated'. The unrated properties are predominantly of high quality, with two thirds rated at least 'very good'.

Leading the supply is Raymond Blanc's Le Manoir aux Quat' Saison, which includes his renowned 2 Michelin-starred restaurant. Oxford City centre has a number of striking, luxury hotels in historic buildings. Henley has its riverside setting, boutique hotels and private members clubs. The Oxfordshire Cotswolds has many beautiful 16th/17th Century hotels with period features and luxury accommodation. Two high-end resort hotels are Warner Leisure's Heythrop Park near Chipping Norton and a members-only Soho House hotel in Great Tew.

New hotels in the planning process or with outline permission could add a further 1,000 bedrooms to the Oxford city hotel stock, comprising up to five new larger hotels and some extensions, (source: Hotel and Short Stay Accommodation Study for Oxford, Bridget Baker Consulting Ltd).

In the following table we present a selection of luxury hotels in Oxfordshire. The selection is intended to give a flavour of supply rather than being a fully inclusive list.

Luxury hotels in Oxfordshire

Hotel	Location	Description	Rating on booking.com	Bedrooms
Le Manoir aux Quat' Saison, A Belmond Hotel	Great Milton	Renowned, 5-star manor house hotel created by Raymond Blanc. 2 Michelin-star restaurant, Raymond Blanc cookery school	9.4	32
Old Bank Hotel	Oxford city centre	5-star luxury hotel in historic building	9.0	43
Old Parsonage Hotel	Oxford city centre	5-star boutique hotel in Oxford's 17th Century Old Parsonage	9.0	35
The Randolph Hotel	Oxford city centre	Striking hotel by Graduate Hotels	8.2	151

Malmaison Oxford	Oxford city centre	Luxury boutique hotel in converted Victorian prison	8.3	95
Vanburgh House Hotel	Oxford city centre	18th Century boutique hotel	7.6	22
The Head of the River	Oxford city centre	Riverside pub in former warehouse with 20 luxury bedrooms	8.2	20
Voco Oxford Thames Hotel	Sandford-on-Thames	4-star IHG hotel Set in 30 acres of grounds and gardens. Pool, spa & gym	8.6	104
Mercure Oxford Hawkwell House Hotel	Iffley	Country manor house hotel, 2 miles from Oxford city centre	8.6	77
The Relais Henley	Henley	Luxury boutique hotel	9.0	40
Hotel du Vin	Henley	Luxury boutique hotel in historic former brewery	8.0	43
Leander Club	Henley	Historic private rowing club with 11 boutique bedrooms	8.7	11
Phyllis Court Members Club	Henley	Members club in historic manor. Fitness centre & pool	8.5	17
Greenlands Hotel	Greenlands, Henley	Home to Henley Business School. Set in 30 acres of grounds with restaurant, bar and fitness centre	8.7	100
The George Inn	Barford Saint Michael	17th Century thatched pub and boutique hotel	9.2	9
The Harcourt Arms	Stanton Harcourt	Traditional country inn with 5 AA star bedrooms and 2 AA rosette restaurant	9.1	10
Old Swan	Minster Lovell	5 AA-star 15th Century inn	7.6	15
Minster Mill Hotel & Spa	Minster Lovell	Converted mill house in 50-acre grounds with spa, tennis court and fishing	7.7	38
The Bird in Hand	Witney	Grade II Listed building with period features	9.3	16
Bay Tree Hotel	Burford	16th Century Cotswold hotel	8.5	21
The Double Red Duke	Clanfield	16th Century Cotswold hotel	9.0	19
The Swan Inn	Swinbrook	16th Century traditional Cotswold country inn	8.9	11
The Killingworth Castle	Woodstock	17th Century coaching inn with Michelin restaurant	8.9	8
The Feathers Woodstock	Woodstock	17th Century townhouse boutique hotel	8.2	21
MacDonald Bear Hotel	Woodstock	Former 13th Century coaching inn with period features	7.8	54

Weston Manor Hotel	Bicester	12th Century country house hotel set in 12 acres of gardens and grounds.	8.2	32
Bicester Hotel Golf and Spa	Bicester	Set in 130 acres of countryside, 11 lakes, health club, tennis, pool, spa, 9-hole golf course	8.1	52
The Chesterton Hotel	Bicester	18th Century Manor house and luxury boutique hotel	9.1	23
Heythrop Park	Enstone, Chipping Norton	Warner Leisure resort. Grade II Listed country house in 440 acres of parkland. Golf, spa, traditional sports, theatre. Adult only hotel	-	311
Soho Farmhouse	Great Tew	Members only Soho House Hotel. Canadian cabin-style, luxury rural retreat in 18th Century farmhouse buildings. Set in 100 acres of countryside with comprehensive, luxury leisure facilities.	-	114

Sources: Booking.com, telegraph.co.uk; Photos: Experience Oxfordshire, booking.com

University accommodation

Many of Oxford's colleges offer accommodation to visitors, although the majority of bedrooms are only available at Easter, mid-June to mid-September, and over Christmas. There are more than 7,000 bedrooms in total. University.com provides a booking service for tourists and conference delegates for rooms at 33 of Oxford's colleges. (Source: Hotel and Short Stay Accommodation Study for Oxford, Bridget Baker Consulting Ltd.)

Self-catering

Oxfordshire offers some very attractive, luxury self-catering cottages with plenty of Cotswold and rural Oxfordshire charm. Experience Oxfordshire promotes self-catering accommodation through four partners:

- Grange Farm Country Cottages – 5 luxury cottages in Godington, rural Oxfordshire.
- StayCotswold Ltd – 50 luxury properties in Oxfordshire, of which 17 sleep 8+
- Greyfriars Hideaway – 2 historic luxury self-catering properties sleeping up to 12 in central Oxford. Visit England 5-star Gold rating.
- Snaptrip Holiday Cottages - with a large collection of self-catering accommodation across the UK.

Cottages.com lists 93 properties in Oxfordshire. 33 have a 5-star rating, 54 have a 4-star rating and 6 have a 3-star rating. 45 are described as 'luxury'. 8 properties sleep 8+ people.

Some providers of note are:

- Bruern Cottages: located between Chipping Norton, Stow-on-the-Wold and Burford. 12 luxury cottages, sleeping between 2 and 10 people. Spa, swimming pool, gym, gardens, children's playgrounds, bicycles and a games room. Visit England 5-star Gold rating.
- Kingham Cottages: collection of 5 self-catering cottages in the grounds of Kingham Lodge, not far from Bruern. It offers 5 acres of landscaped gardens, tennis court, indoor swimming pool and a traditional Turkish Hammam.
- Treedwellers Treehouses: located near Chipping Norton, offering 7 striking, luxury treehouses, sleeping 3 - 5 people





photos: cottages.com, Kinghamcottages.com

Airbnb

AirDNA (provider of short-term rental data for Airbnb and Vrbo) reports over 3,000 active rentals in Oxfordshire, 42% of which are available full-time. 67% are 'entire home' rentals. There is of course a cross-over between the commercial-provider supply discussed above, and the supply data provided through AirDNA, with many commercial cottage providers also promoting their properties through Airbnb.

AirDNA data

	Oxfordshire
Entire home	2,131
Private room	995
Shared room	8
Total active rentals	**3,134**
Entire home rentals as percentage of total active rentals	67%
% available full time	42%
Average rental size (bedrooms)	2.1
Average rental size (guests)	4.5
Airbnb ratings (% at least 4.5 overall)	84%

Source: AirDNA

Camping & Glamping

The Visit England stock audit above indicates that there is a large supply of camping accommodation in Oxfordshire, particularly in Cherwell. Around 60 camping sites are listed on pitchup.com, predominantly small, rural sites. Some of the larger ones are:

- Hardwick Parks, Standlake: 180-acre site with 196 pitches, 2 lakes, watersports on Windrush River, bar, restaurant
- Lincoln Farm Park Standlake: 5-star site with 90 pitches, play area, games room, leisure centre with gym and two swimming pools, shop
- Swiss Farm Touring and Camping, Henley: 5-star site with 125 pitches, glamping, holiday homes, fishing lake, outdoor swimming pool, shop, café, bar
- Greenhill Leisure Park, Bletchingdon: 100 pitches, shop, play area and 4 fishing lakes

- Oxford Camping & Caravanning Club: 80 pitches, 1 mile from the city centre
- Cotswold View: 5-star rating from Times Travel, 131 pitches, farm trail, outdoor games and gym, games room, located in Charlbury
- Burford Caravan and Motorhome Club: 121 pitches, opposite Cotswold Wildlife Park
- Chipping Norton Camping & Caravanning Club: 90 pitches plus 5 safari tents

There are a few, small clusters of glamping units as well as a scattering of individual shepherd's huts and safari/bell tents across the county. Some examples are:

- The Chilterns' View, Wallingford: 5 adult-only eco lodges with wood burning stoves and hot tubs, situated on the Ewelme Down Farm estate
- Ye Olde Swan Tipi Village, Bampton: 10 luxury tipi tents on the banks of the River Thames
- Glamping Thorpe, Banbury: converted huts, caravans, bell tents and army style glamping trailers, 10 units in total. Set up for parties and group events.
- Oxford Riverside Glamping, Witney: 10 bell tents adjacent to River Thames pathway
- Rolling Fields Glamping, Moulsford, Wallingford: 3 bell tents, 2 Luna tents and a shepherd's hut
- Valley Farm Campsite: camping site with 20 touring pitches, 3 bell tents and 1 shepherd's hut, situated 3 miles from Oxford
- The Red Lion at Northmoor: 3 luxury shepherd's huts





Photos: campsites.co.uk

CONFERENCE VENUES

Oxfordshire's conference and meeting provision is predominantly supplied through the county's larger hotels and Oxford University's colleges and venues. In addition, the King's Centre, Oxford is a dedicated conference/meeting/exhibition/event venue with a capacity of up to 1,000 delegates. Further, larger-capacity venues in Oxford (500+ delegates) are the Kassam Stadium, Oxford Town Hall, Sheldonian Theatre and New Theatre.

The following table lists a selection of larger-capacity conference venues:

Selection of Oxfordshire Conference Venues

Venue	Location	Description	Maximum capacity (theatre)
Hotels			
The DoubleTree by Hilton Oxford Belfry	Thame	154-bed hotel with 19 meeting rooms, spa and swimming pool.	450
The Randolph Hotel	Oxford	151-bed, 5-star, landmark city centre hotel. 6 meeting rooms.	350
Leonardo Royal Hotel	Oxford	240-bed hotel with 20 meeting rooms, gym, splash pool. 3 miles from Oxford city centre.	350
Voco Oxford Spires Hotel	Oxford	181-bed hotel with 10 meeting rooms, gym, spa and swimming pool.	266
Voco Oxford Thames Hotel	Sandford-on Thames	104-bed hotel with 11 meeting rooms, gym, spa and swimming pool.	200
Mercure Oxford Hawkwell House	Iffley	77-bed hotel with 5 meeting rooms	200
Bicester Hotel and Spa	Bicester	52-bed hotel with golf, tennis, outdoor activities, health club & spa. 8 meeting rooms.	200
Phyllis Court Club	Henley	5 meeting rooms, 17 hotel rooms, fitness centre with swimming pool.	300
Universities			

Venue	Location	Description	Maximum capacity (theatre)
Oxford University	Oxford	Conference Oxford lists 72 university colleges/venues that offer conference/ meeting/event facilities. In total there are over 500 meeting spaces, with capacities from 50 to 900 guests. The Ashmolean Museum has 8 meeting rooms and a reception capacity of 900 in the atrium. The Oxford Union has 7 meeting spaces with a maximum, theatre-style capacity of 635. The Newman Rooms have 8 meeting spaces with the largest room seating 500. Three of the examination schools have capacities of 300+. The Said Business School has 17 meeting spaces with the largest lecture theatre seating 317.	635
Oxford Brookes University	Oxford	Over 50 meeting rooms, 5 lecture theatres (maximum capacity 320) and a large lecture hall (maximum capacity 475).	475
Conference centres			
The King's Centre	Oxford	Conference centre with 12 meeting spaces. 9,000 sqm exhibition space.	1,000
Culham Conference Centre	Abingdon	Conference centre at Culham Science Centre. 7 meeting rooms.	234
Worton Hall	Cassington	Meetings, weddings & events venue on a working farm. 3 meeting spaces. Holiday lets, tennis, swimming pool.	280
Other venues			
The Kassam Stadium	Oxford	38 meeting rooms, dedicated meeting & events team. 400 sqm exhibition hall.	600
Oxford Town Hall	Oxford	Grade II Listed Victorian building with 10 meeting rooms.	500
New Theatre	Oxford	Theatre with 4 meeting rooms and main auditorium seating 1,785	1,785
Sheldonian Theatre	Oxford	Sir Christopher Wren Theatre. Oxford University's ceremonial hall. 4 meeting spaces.	717
Bicester Heritage	Bicester	Hangar hire – 45,000 sq. ft flexible events/filming space and 2 meeting rooms	450
Williams Experience Centre	Wantage	Conference and training centre with 7 meeting spaces	200

Sources: Experience Oxfordshire, conferencesuk.org.uk; online research

Oxford University's Rhodes House is currently undergoing a major redevelopment programme, including the construction of a new conference centre catering for events of up to 300 delegates.

Conference Oxford represents 70 venues in the city. This includes 38 Colleges, 3 permanent Private Halls and 29 University venues, the latter including academic departments, museums, gardens, libraries and ceremonial buildings. Academic events account for the majority of enquiries (55%), the corporate market accounts for 22%, Associations 4%. In terms of international Association conference business, ICCA reported that Oxford hosted 24 international conferences in 2019 (38 in 2018). This ranked the city 4th in the UK for both years. (Source: Hotel and Short Stay Accommodation Study for Oxford, Bridget Baker Consulting Ltd.)

In 2018, OxLEP commissioned Oxford Brookes Business School to undertake a study into the potential for the sustainable economic growth of the business visitor economy (BVE) in Oxfordshire. The study concluded that the BVE in Oxfordshire has the potential to grow through better use of existing resources and more collaboration between venue and accommodation providers and agencies. However, it also concluded that the existing provision faces significant capacity constraints and is not able to host events over a certain size in any of the BVE and live performance segments identified as providing the potential for growth.

PIPELINE PROJECTS

Some significant pipeline projects to note are:

- Great Wolf Lodge is North America's largest owner, operator and developer of family-orientated indoor waterpark resorts. Their first European resort will be located in Chesterton, near Bicester. The £200 million development is at detailed design stage, with a target completion of late 2024.
- Oxford United FC new stadium and conferencing facilities: proposed new 16,000-seat stadium on land south of Kidlington. Currently at local consultation and negotiation stage. The stadium would include some conference facilities for approximately 1,000 and a new 200 bed hotel.
- Mullin Automotive Experience: American car enthusiast, Peter Mullin, has submitted plans to West Oxfordshire District Council to develop a classic car museum at The Driving Centre, Enstone Airfield on the Great Tew Estate. Along with the museum there would be luxury holiday homes and farmstead properties.

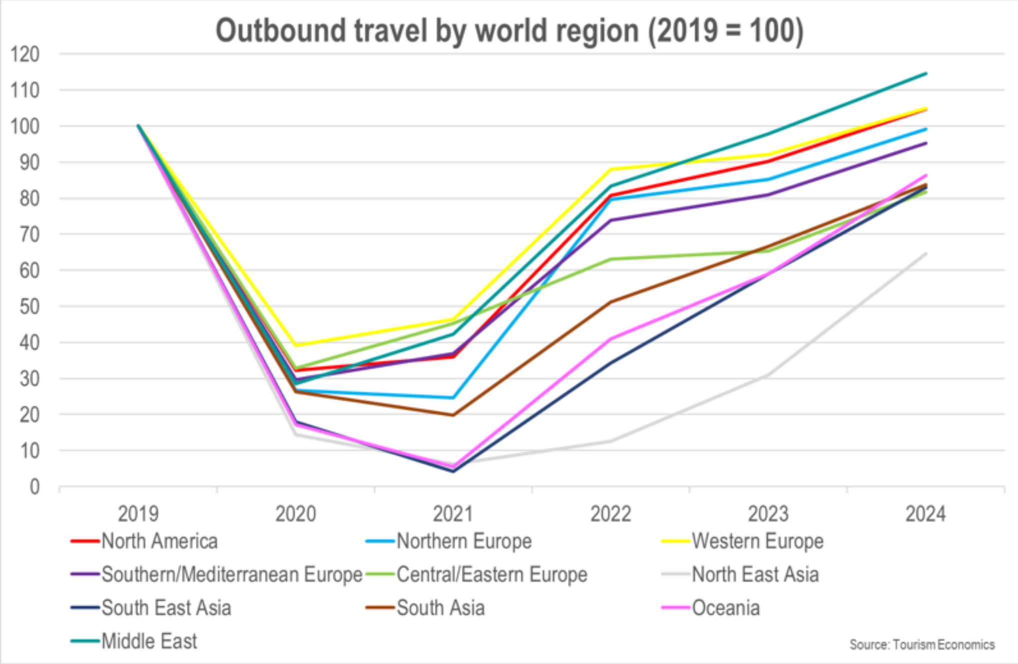
- Bicester Motion masterplan: Bicester Motion Heritage was founded in 2013 and is now considered to be the home of historic motoring enterprise in the UK. The site has become a visitor attraction, with thousands of visitors attending the scramble events. Bicester motion Heritage is the first of four quarters to be developed on the 400-acre site which is a former WW2 RAF Bomber Training Station. The remaining three are: Innovation, Experience and Wilderness. The Experience Quarter will be a family day out destination, with 3 miles of driver training and handling tracks. The Wilderness Quarter will regenerate a former quarry and lakes to provide a wilderness reserve, promoting health and well-being and outdoor activities. It will also include eco-lodge style accommodation. Bicester Motion plans to become a top 20 UK visitor attraction.
- Banbury Vision 2050: a consultation and engagement programme is being undertaken by Cherwell District Council, as a first phase of a long-term regeneration plan for Banbury. The plan includes retail, culture and tourism, the evening economy, housing, employment, and connectivity.
- Oxford Covered Market: Oxford City Council has approved (February 2023) a £6.87 million package to revitalise Oxford's historic Covered Market. The masterplan includes three main improvements: a pedestrian friendly Market Street, a new communal space with a large seating area, and improved entrances.
- The Store Hotel, Oxford: a new, 100-bed, 4-star hotel is being developed on the site of the old Boswells department store. Due for completion in Spring/Summer 2023.
- Estelle Manor (previously Eynsham Park), near Witney, will reopen in Spring 2023 after an extensive refurbishment programme. It will open as a membership club, similar to the Soho House concept. It will offer 108 bedrooms, four restaurants, extensive health and spa facilities, kids club and members area.
- Wilder Spaces is a new planned visitor attraction positioned as a 'new destination for nature in Oxfordshire'. BBOWT, the region's nature largest conservation charity, is developing Wilder Spaces. The attraction will feature a range of wildlife-friendly show gardens and immersive learning experiences to encourage visitors to take action for nature. Assuming capital project expenditure of £40m and annual visits of up to 500,000, the economic impact of Wilder Spaces is projected to be between £250-£300m, creating at least 40 FTE jobs.

7 DEMAND SIDE DRIVERS AND FORECASTS

FORECASTS FOR INTERNATIONAL TOURISM

For much of the past thirty to forty years you could be pretty certain that the volume of international tourism trips taken globally would grow by about 4% per annum, with more mature destinations such as the UK seeing growth a percentage point or two below this level.

The past three years were very different due to the pandemic, but recovery in international travel has not been even across different world regions.
The following chart is based on forecasts from Tourism Economics and shows the volume of outbound travel from different world regions, with this indexed to 100 in 2019 to aid comparisons.



We can observe that while the volume of travel fell from all world regions the decline was a little less steep in Europe than in Asia in 2020 and 2021. By the end of this year it is forecast that outbound travel from the Middle East, Western Europe and North America should be back to levels seen in 2019, whereas even by the end of 2024 outbound travel from North East Asia could be one-third lower than had been the case ahead of the pandemic.

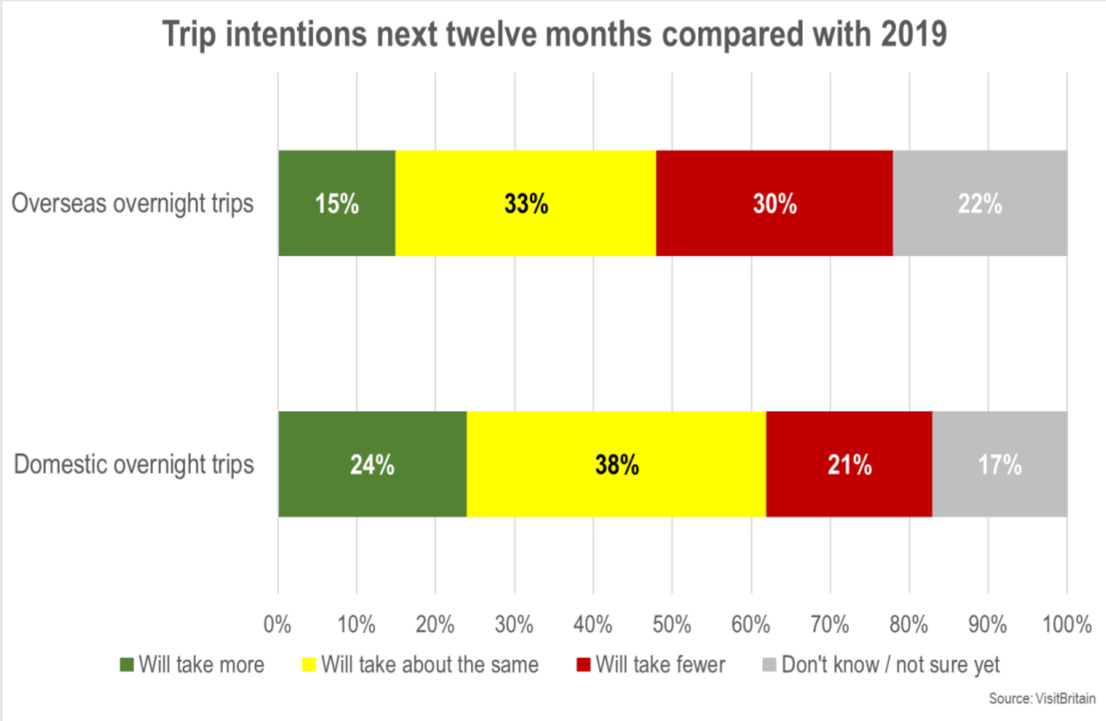
VisitBritain forecasts that inbound visits to the UK in 2023 will reach 86% of their 2019 volume, with the strongest performance from short-haul markets, the Middle East and North America, whereas arrivals from Asia look set to remain relatively subdued this year despite the easing of travel restrictions in China.

FORECASTS FOR DOMESTIC TOURISM

As the main surveys capturing the volume and value of domestic tourism have generated little data in recent times due to both a change in survey methodology and their suspension during the early part of the pandemic it is tricky to pinpoint reliable forecasts for the absolute volume or value of domestic tourism.

However, past experience tends to suggest that the market for overnight tourism is typified by little to no growth, with one of the few exceptions in the past couple of decades being 2009 when a dramatic decline in the value of sterling dissuaded many from travelling abroad and to take a staycation instead.

We can nonetheless use the Domestic Sentiment Tracker undertaken by the national tourist boards of England, Scotland and Wales to get a flavour for short-term prospects, the most recent wave of which was published on 17th March with fieldwork having taken place during the first week of the month.



One of the questions posed in the study asks respondents about their trip intentions in the next twelve months compared to before the pandemic. We can see from the chart that twice as many say they will be taking fewer overseas trips as say they will be taking more overseas trips, whereas slightly more say they will be taking more domestic overnight trips than say they will be taking fewer such trips.

This potentially signals some trip switching from overseas to domestic, but it is important to note that more than one-in-five said they didn't know what their overseas travel plans might look like this year.

From a separate question in the survey we can explore what the perceived barriers are to taking a domestic overnight trip in the upcoming six months, and the answer is very much an economic one, with 39% citing the rising cost of living as a barrier and 28% their personal finances.

When asked how they might cutback on their UK overnight holiday spending the most common answers were to choose cheaper accommodation, to look for more 'free' things to do and to spend less on eating out, with just shy of 30% mentioning each of these.

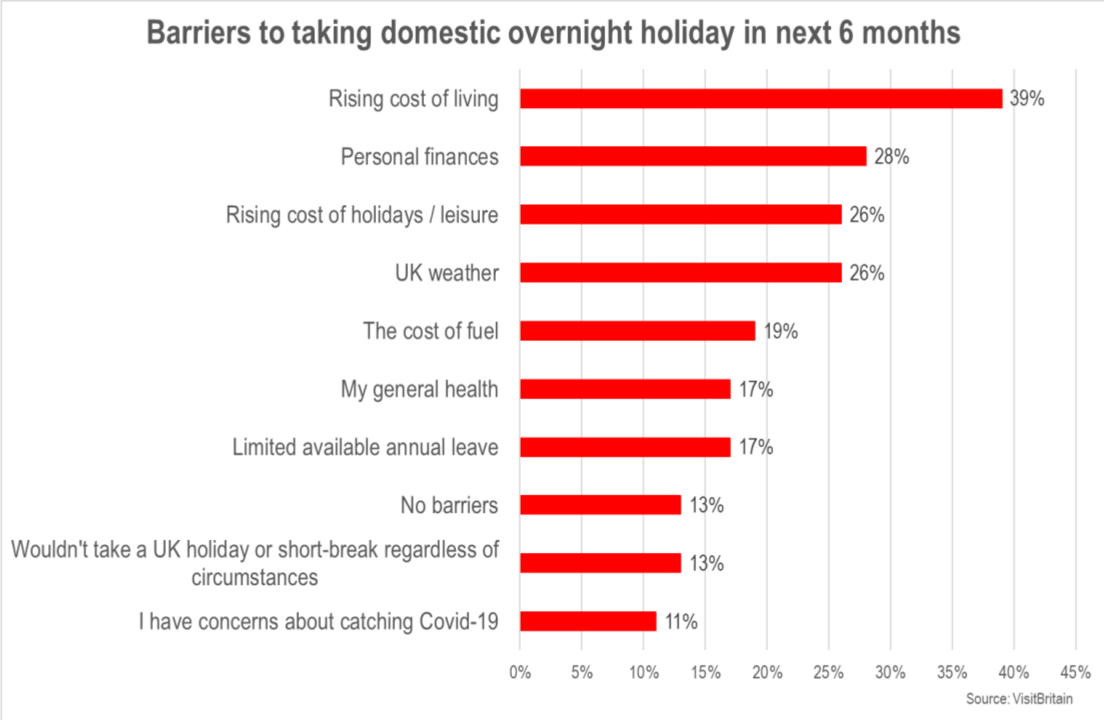
Of those surveyed 9% said they would take domestic day trips instead of overnight breaks, while 8% said they simply wouldn't go on any domestic overnight trips.

For domestic day trips the most common approach to adapting to cost of living pressures were found to be to look for more 'free' things to do (28%), spend less on eating out (26%) and to take fewer day trips (25%).

Many of the habits that people adopted during the pandemic were done so reluctantly, and even those that felt more amenable at the time have started to evaporate as lockdown retreats further into our memories. However, one change that was accelerated by Covid-19 and looks set to stay, and that has an implication for tourism, is working from home.

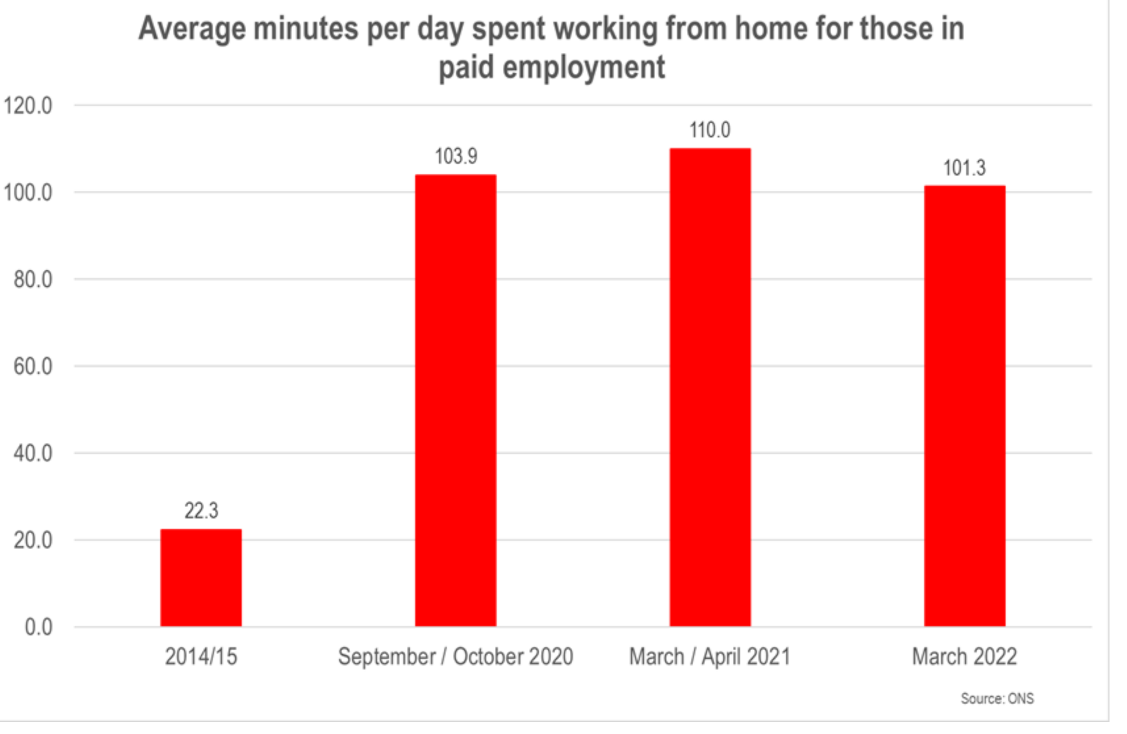
This impacts city centre hospitality businesses if there is lower commuter footfall and the overall volume of business tourism as virtual meetings become the norm for many.

We can see from the next chart that the average number of minutes per day spent working from home for those who



are in paid employment shot up at the start of the pandemic and that despite it now being many months since there were any form of restrictions on movement the figure remains much higher than it historically was, standing at 101.3 minutes per day in March 2022.

One school of thought might be that if people are spending more time in their homes they will choose to invest more of their income on that home, and/or move to a place that is further from their employer's office, and it is realistic to imagine that Oxfordshire would be a desirable location for many who need regular but occasional access to a workplace in central London.

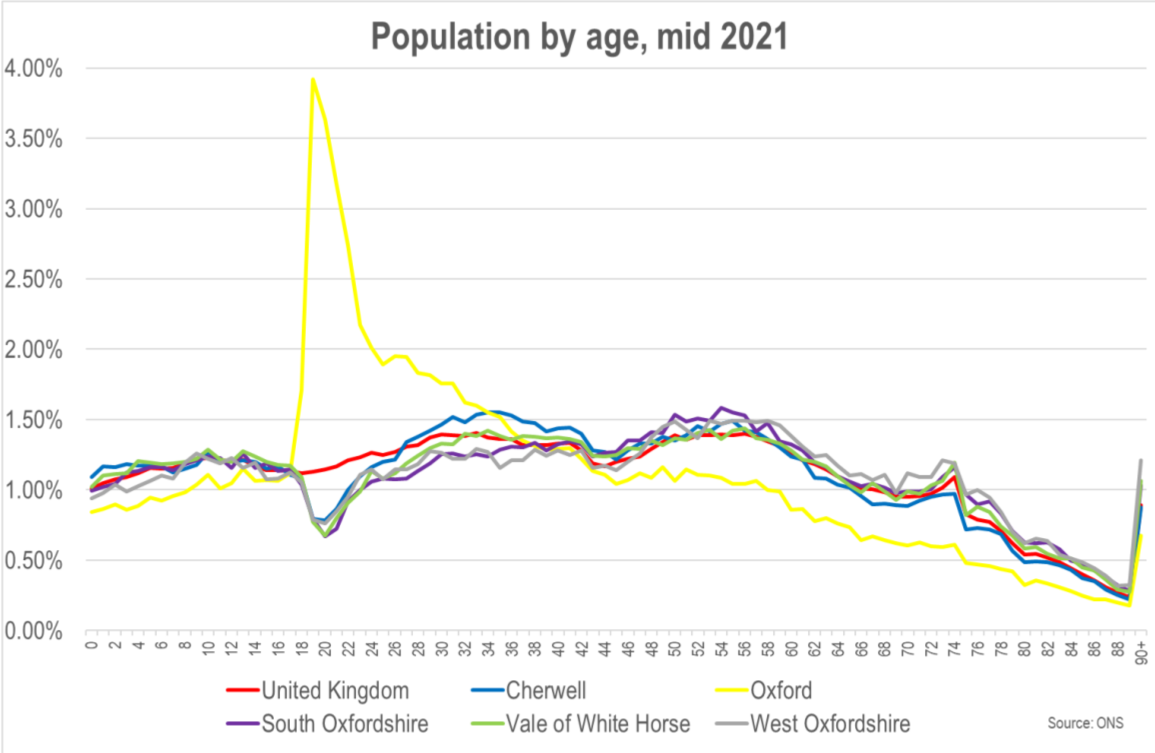


DEMOGRAPHICS

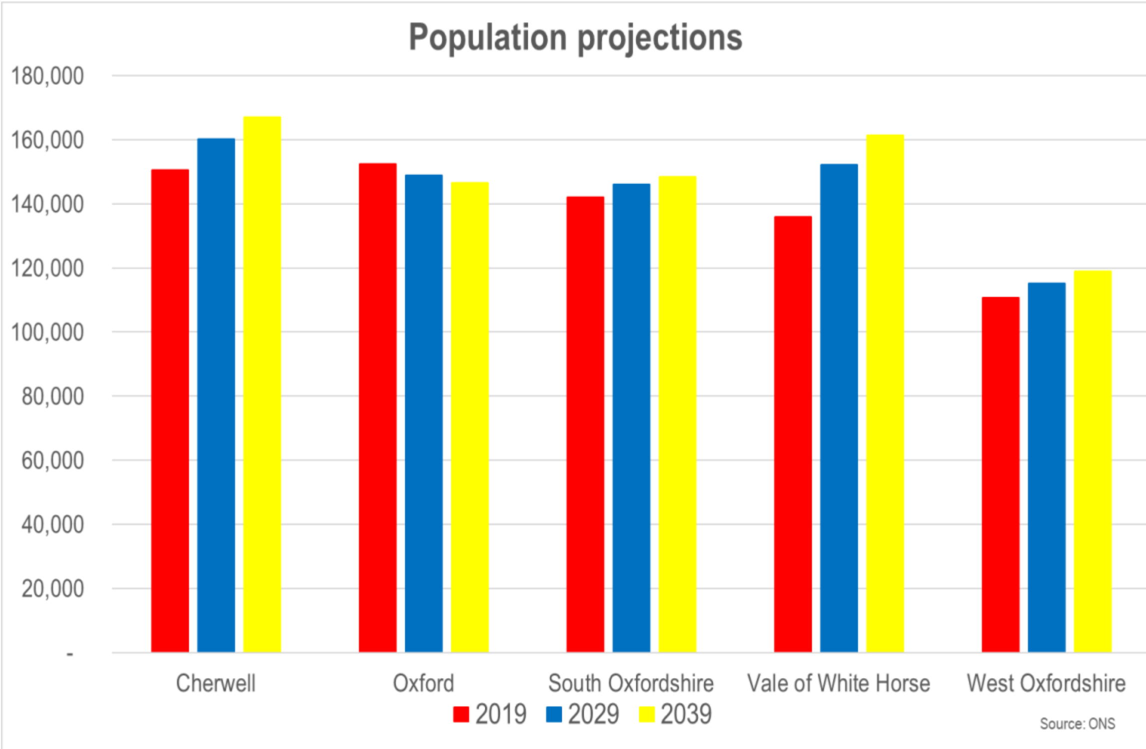
As was established earlier, around half of tourism spending in the county comes courtesy of day visits by domestic residents. Analysis shows that across England as a whole 52% of all Tourism Day Visits had a round-trip distance of less than 20 miles, with just 28% at over 40 miles. This tells us that the bulk of day visits in most areas are going to be by those who live relatively locally.

While Local Authority level data is not available for this metric from the survey, we might imagine that for Oxford (as opposed to the wider county) there may be a greater tendency for visits to have an above average distance considering the ease of travel by public transport from London. However, it is the demography of the local population that will play a key role in shaping the vibe of a place, and the following chart plots the age distribution for each Local Authority area in the county alongside that for the UK as of mid 2021.

The standout insight is perhaps no surprise given the high number of students in Oxford, but nonetheless it is striking just how distinct the population of the city is compared to that of the rest of the county. We can also see that Oxford has relatively fewer residents aged 45+ than is the case elsewhere, while remaining Local Authorities all have a relative absence of those aged from their late teens through to their mid-twenties in comparison with the UK.



Population projections suggest that Cherwell and Vale of White Horse are the areas set to see the fastest growth in population over the next ten to twenty years, with the tally elsewhere being broadly either stable or showing a slight decline.



Turning to national as opposed to local demographic trends all other things being equal it is reasonable to expect that the volume of tourism will respond to changes in the size of a nation's population.

Between 2000 and 2021 the population of the UK increased by 8,1 million, to stand at 67 million. Growth, however, has not being geographically uniform in nature, for example, the population of London has increased by more than one-fifth over the period, well ahead of any other area. Wales and Scotland have both seen modest growth of 8% or so, but the area with the slowest pace of population growth has been North East England at just 4%.

It is not just how many people there are that matters of course, those of different ages will exhibit different travel behaviours.

The following chart plots the resident UK population by age band in 2001, the estimates for 2021 and projections for 2041. Among the insights that emerge from the chart are:

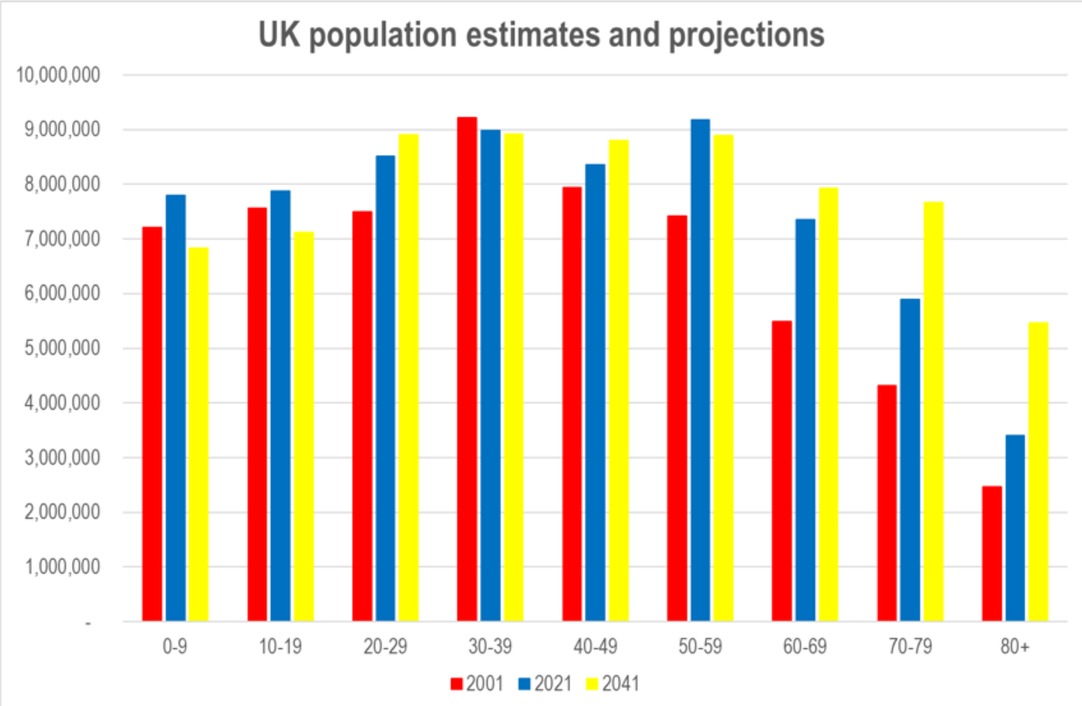
- Whereas in 2001 the most populous age group was 30-39 by 2021 it was those aged 50-59 (of course these will largely be the same individuals but twenty years older)

- The number of children aged 0-9 increased by roughly 600,000 during the period 2001 to 2021 but a decline of close to one million is projected by 2041
- There were one million more residents aged 20-29 in 2021 than two decades earlier, reflecting both ageing of those 0-9 back in 2001 but also significant inward migration by young working-age adults
- Every age band from 40-49 and older has seen a rise in population over the past twenty years, including almost 1.8 million more residents aged 50-59 and aged 60-69, and 1.6 million more residents who are in their 70s
- The upcoming two decades are projected to see further ageing of the UK population with steep increases in those above retirement age
- The population of over 80s is expected to be more than twice its 2001 level by the time we reach 2041

An ageing population has significant implications for visitor economy businesses, including that a growing chunk of the market might expect to receive discounted admission etc due to being above the retirement age.

Furthermore, the need for businesses to be accessible to those with a disability will increase given the correlation between propensity to have an impairment and age. It is estimated that one-in-five people in the UK have some form of disability, with this increasing to two-in-five of those aged 70+.

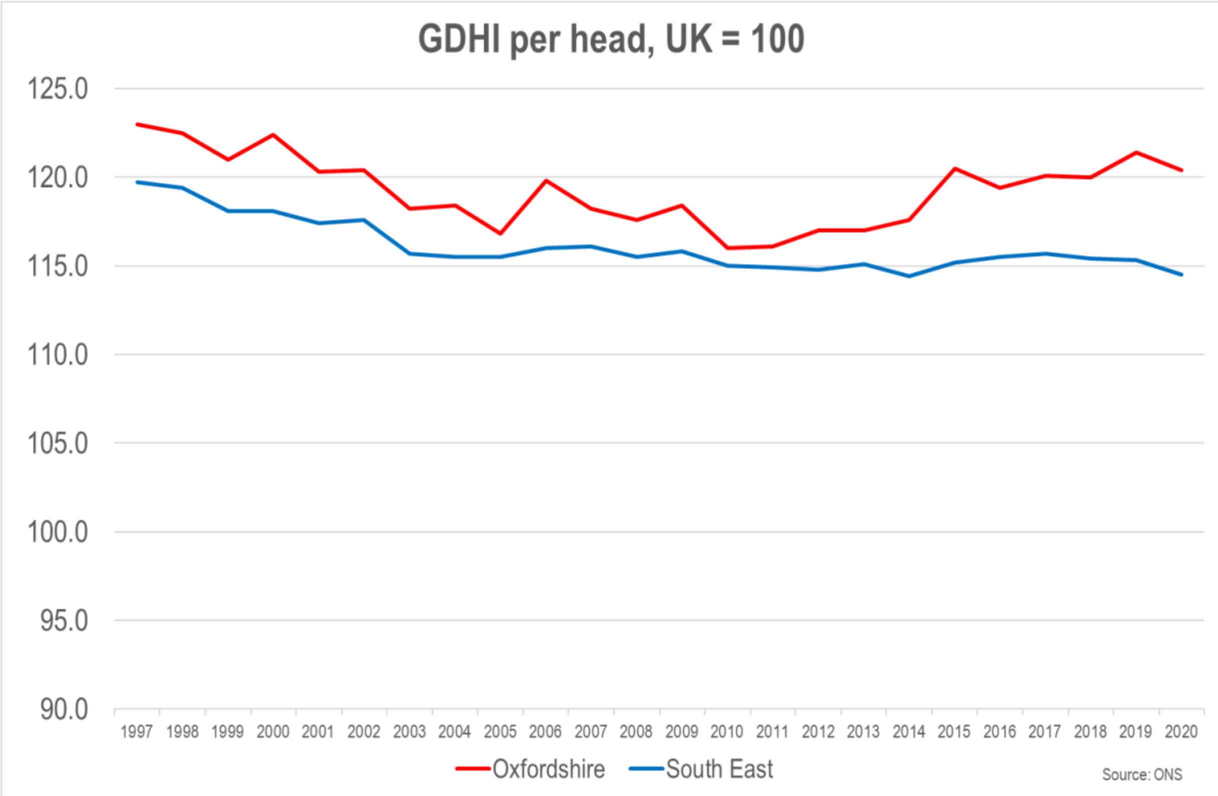
A growing array of insights has started to emerge from the 2021 Census that may be of relevance to the scale and nature of tourism demand, including that over the past decade there has been an 8.3% increase in the number of people living alone in the UK, with the proportion of one-person households ranging from 25.8% in London to 36.0% in Scotland. This underscores the importance of visitor economy businesses having affordable options for solo travellers.



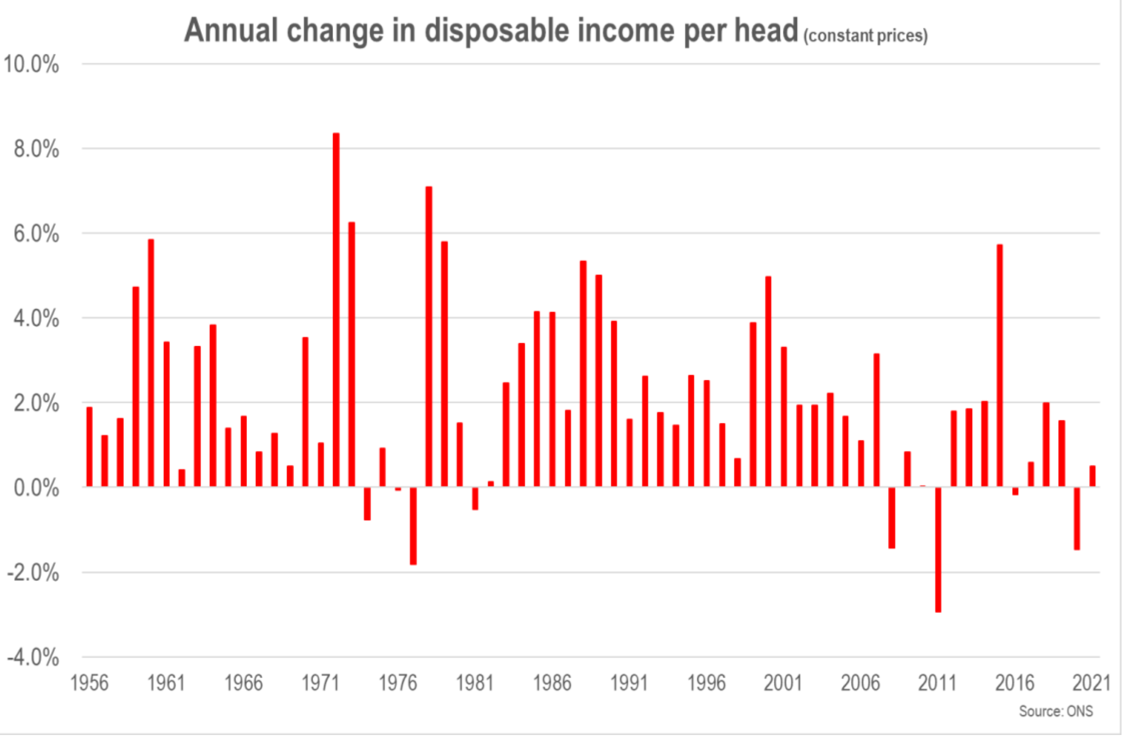
INCOME

Income is a key driver of tourism, and the next chart shows Gross Disposable Household Income per head for Oxfordshire and the wider South East of England relative to that for the UK for the period 1997 to 2020.

We can see that throughout this period the residents of Oxfordshire are, on average at least, better off than is the case for the typical resident of South East England by a fairly narrow margin, but by a more substantive amount when it comes to the wider UK population. Oxfordshire had been increasing this differential fairly consistently since 2011, and it will be interesting to see whether this trend has persisted in the more recent past when 2021 data is released in early April.



Turning to national trends and projections, the following chart shows the annual change in disposable income per head once figures are adjusted for inflation extending back over recent decades.



In the two decades up to 2001 the average annual growth rate had been 2.9%, but in the subsequent two decades it has fallen sharply to just 1.1%, so while in more recent times we have, on average, been getting richer, this is at a much slower rate than had been the norm.

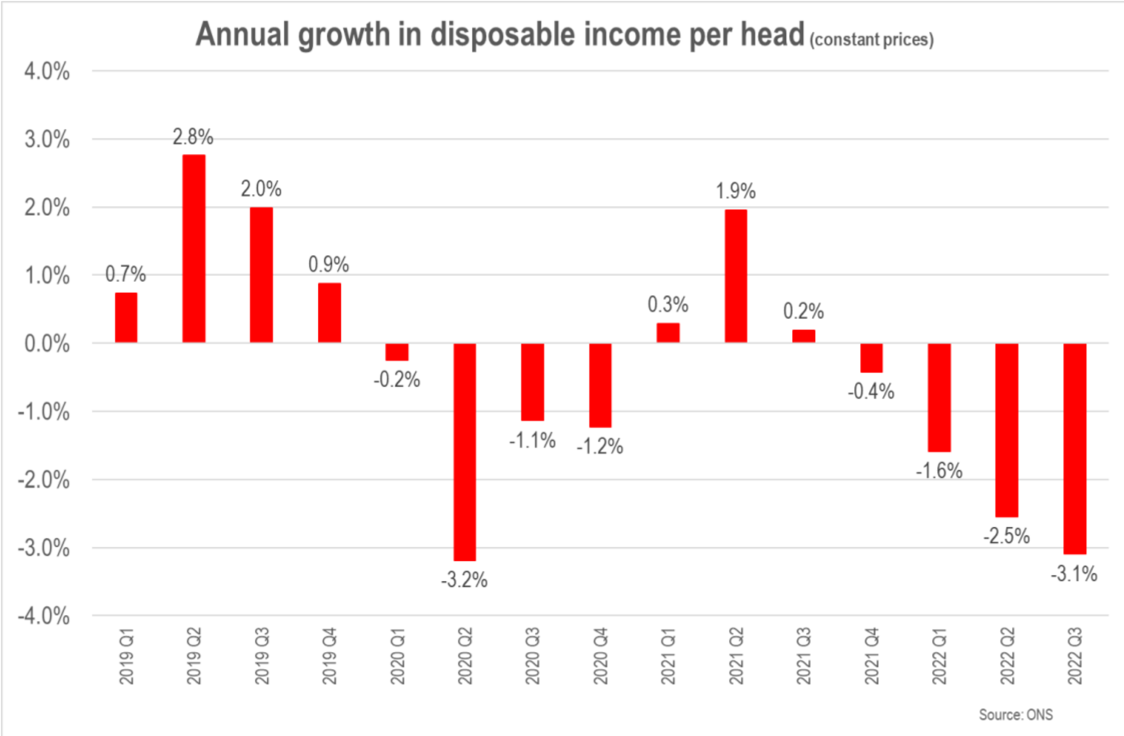
The economic ups and downs during the pandemic saw many oddities, with GDP falling dramatically but incomes largely holding up thanks to the furlough scheme. However, the second chart paints a worrying picture as it shows the same data series as per the annual figures but on a quarterly basis from the start of 2019 through to Quarter 3 of 2022 (the most recently published data point).

We can observe how rapidly the situation has deteriorated since late 2021, with a year-on-year decline in disposable income per head of 3.1% in Q3 of 2022. While the economic situation is now more stable than was the case briefly last autumn, most analysts still expect that 2023 will see the typical household get poorer rather than richer. This clearly has implications for the choices that individuals and families will make regarding their discretionary spending on activities relating to travel and tourism.

Inflation is set to fall back during 2023 but that does not mean prices are falling, simply that they are increasing more slowly. The Bank of England again increased base rates at its March Monetary Policy Committee meeting, but many analysts now expect there to be few if any further hikes.

At the risk of celebrating what is in essence mediocre news it does now appear that the UK will not enter a technical recession this year, but the Head of the Office for Budget Responsibility has said that the typical UK household may be no richer five years from now than it was back in 2019.

The lacklustre outlook for how much income potential visitors have available looks set to act as a brake on the visitor economy for at least the next couple of years.



TRANSPORT

Every destination that wishes to thrive has to be accessible, ideally to those wishing to use public transport, those wishing to use their own or a hired vehicle and indeed those organising group tours.

While Oxford and Didcot both enjoy excellent public transport links to London and reasonable public transport links to the West, Midlands and North, many parts of the wider county have limited public transport provision. Both Bicester and Banbury have services south to London Marylebone and the latter is also served by Cross-Country trains operating to the south coast from the North of England. Bicester Village is an example of a large retail destination that has excellent rail connections, allowing those in London to reach the site in 46 minutes.

Oxford has some of the most frequent and affordable coach links with London of any comparable city of a similar distance to the capital. This can equally be a lever for encouraging those wishing to spend at least some time in London to overnight in Oxford and make value for money trips to central London. Improvements are on the cards with the redevelopment of Oxford station and the planned launch of East West Rail linking the city to Milton Keynes, and eventually Cambridge, but in the short-term this will result in disruption to both rail and road users while work takes place.

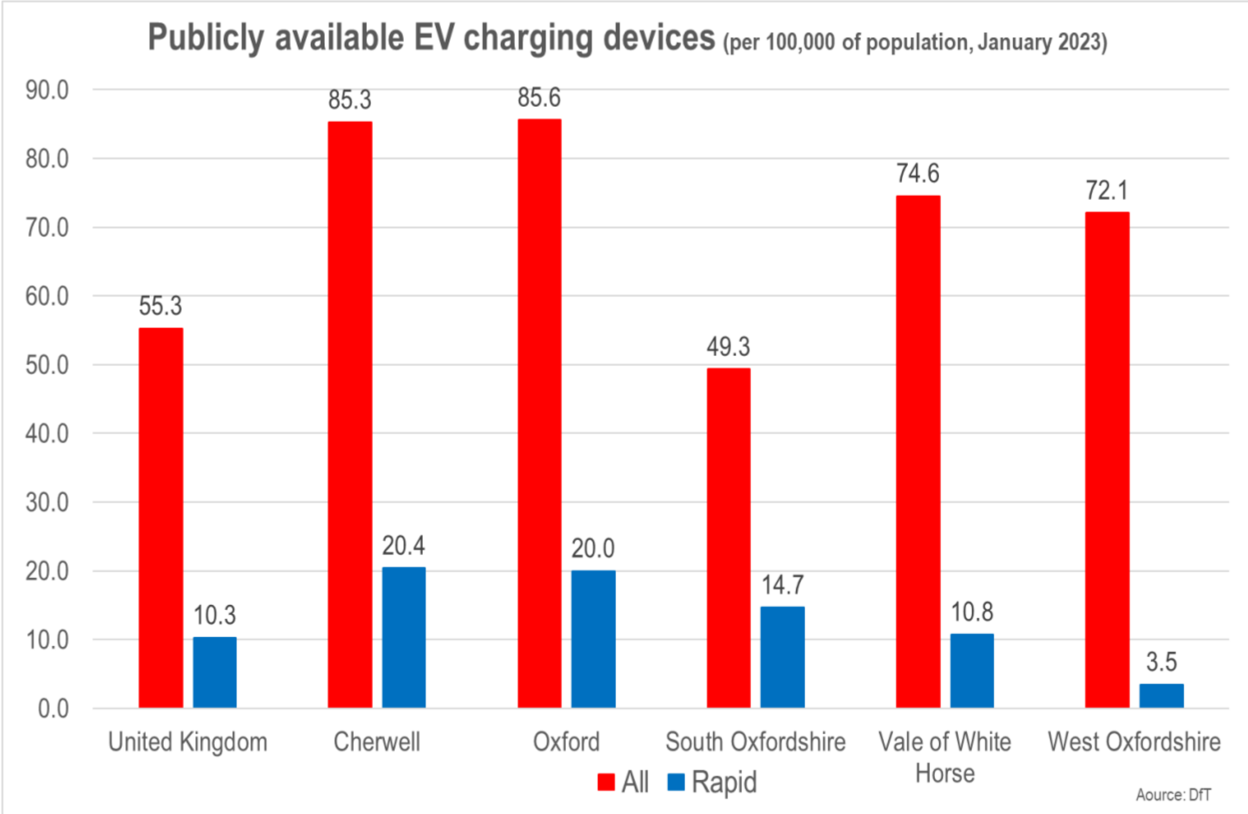
It might be that having frequent services from London that can take under an hour is as much a curse as it is a blessing for the city's visitor economy, in as much as this enables day trips to be taken rather than overnight stays, thereby reducing visitor spending.

This same argument can be made in relation to international visitors who can readily stay in London but make a day trip to the county rather than experience the local accommodation offer. Oxford is readily accessible by train and coach from Heathrow, Gatwick and Birmingham Airport, but not so easy to reach for those arriving at the low cost hubs of Luton or Stansted. Even though getting from the likes of Heathrow to Oxford might be fairly quick and easy, for an inbound visitor with limited knowledge of the options available staying in London and visiting on a day trip may feel like a more manageable alternative to carting their luggage from the airport to a city whose name that airport does not bare.

A study undertaken by the national tourist boards in the middle of the past decade explored the characteristics of domestic overnight visitors to a range of destinations, one of which was Oxford. This revealed that 19% of visitors to the city lived in Greater London and a further 17% in the South East of England, demonstrating that even for trips that involve a night away from home the destination is often relatively local in nature.

Most domestic tourism journeys are undertaken by car, and that poses the challenge of providing appropriate parking facilities at those locations frequented by visitors. An additional consideration that has emerged in recent years relates to growth in the number of electric vehicles in the car fleet. The amount of publicly available charging devices has not expanded as rapidly as has the number of EVs, and there is variation in the number of devices in different localities as well as a widespread perception that the charging infrastructure is often unreliable.

From the chart we can note that when thinking about all types of charging device four out of the five Local Authority areas in the county were ahead of the UK in terms of devices per 100,000 of population while South Oxfordshire lagged the UK slightly. For rapid charging devices the only Local Authority to be behind the UK average at the start of 2023 was West Oxfordshire.



ENVIRONMENT

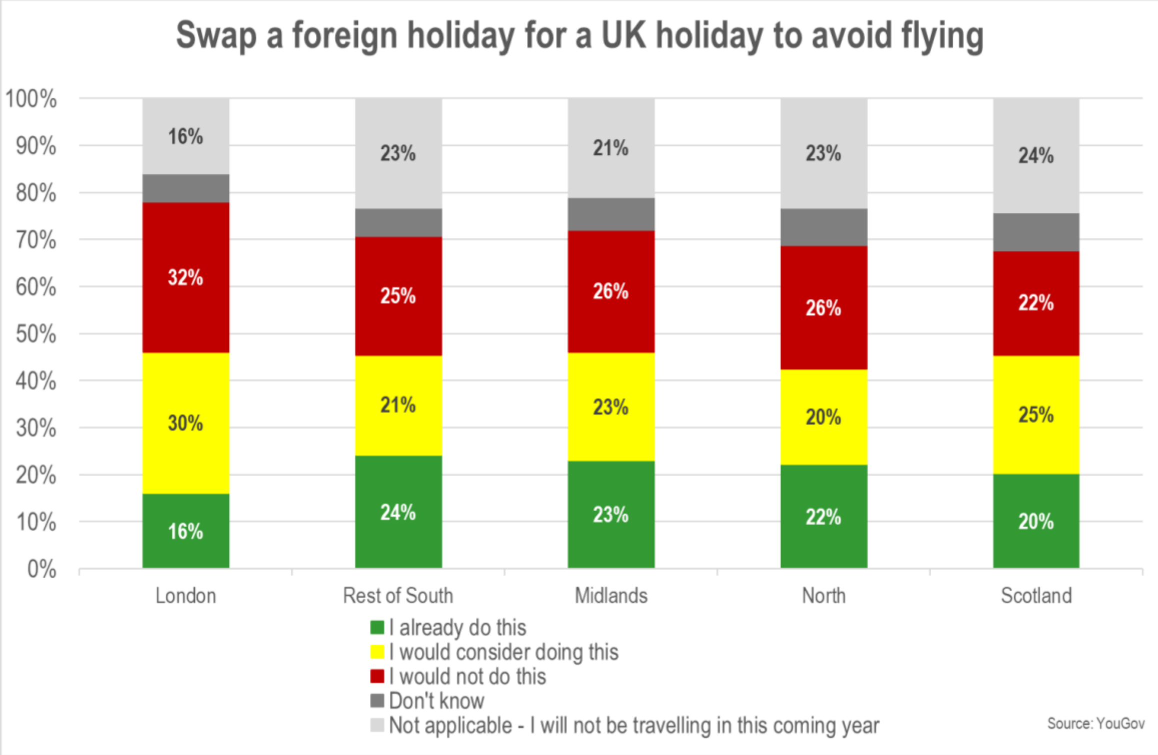
Caution is required in jumping to the conclusion that travel behaviours are quickly changing due to awareness of climate change and a broader appreciation of matters connected to the environment.

Several surveys have shown that people say they are concerned about the environment, but when asked to rank different factors that determine their choice of destination, hotel etc, environmental considerations tend to be towards the foot of the table, with factors such as value for money far more important.

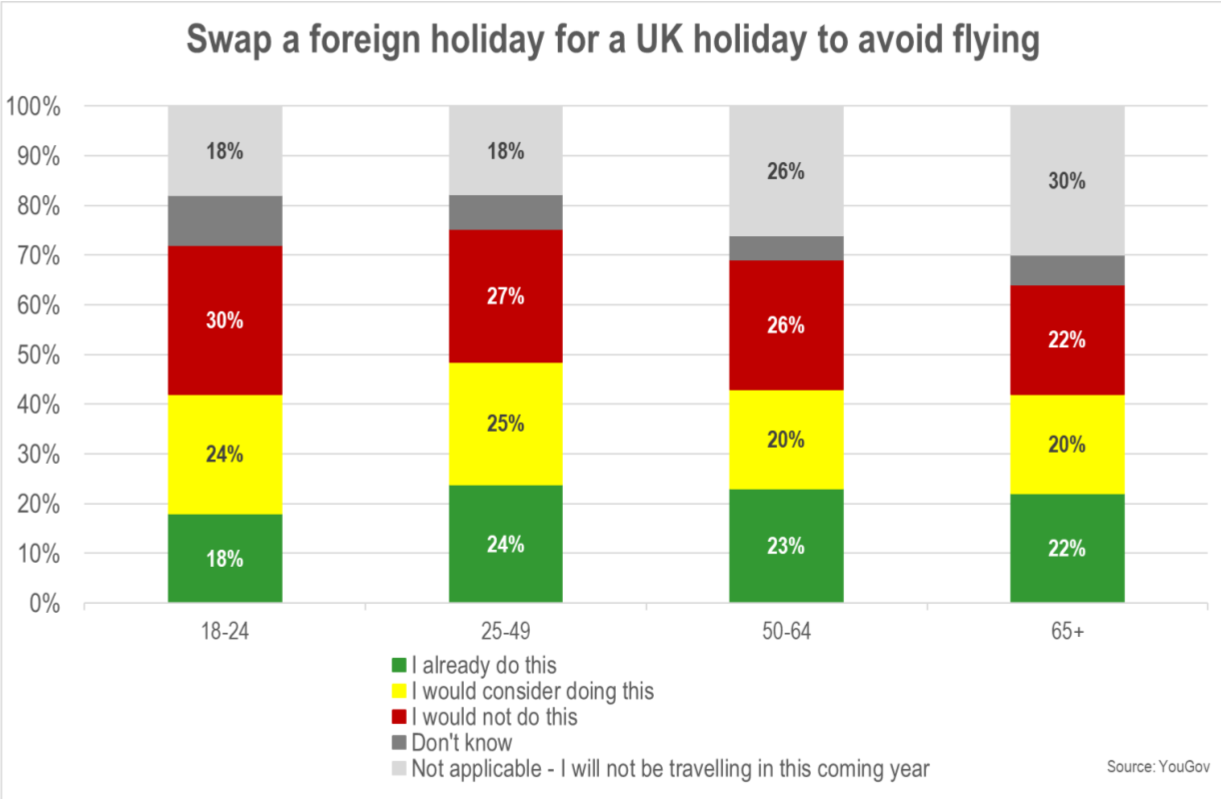
There is helpful data from YouGov polling covering the degree to which Brits say they would swap a foreign holiday for a domestic trip in order to avoid flying.

The following chart shows that at the start of 2023 the proportion saying that this is something that they already do varied from 16% for those living in London to 24% for those elsewhere in the South of England.

However, between one-quarter one-third said that this is not something they would contemplate doing, with the greatest levels of rejection being among those who live in London.



Perhaps contrary to expectations when analysing the way this question was answered by age we can observe that it was the young who were the least keen on the idea of giving up a foreign holiday, maybe a function of having been denied the chance to explore the world on their own as they enter adulthood due to travel restrictions in 2020 and 2021.



8 ENGAGEMENT AND CONSULTATION

The development of the DMP has involved extensive consultation and engagement which has included:

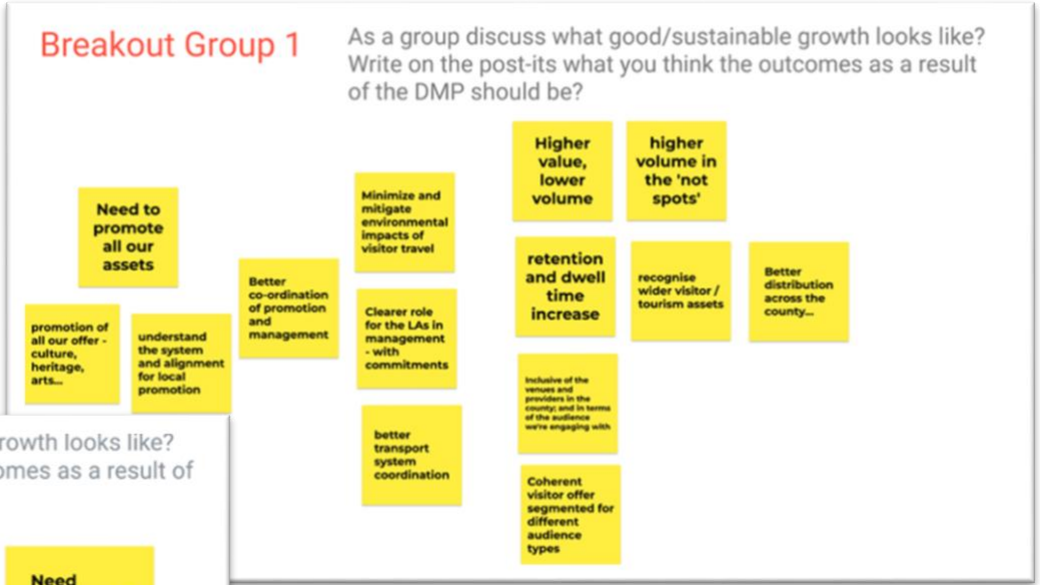
- Visioning Workshop with the DMP Steering Group (29 March) and sessions following stage 1 and stage 2 of the project
- Stakeholder Workshops (face to face 18 May and online 26 May)
- Meeting with the local authority Chief Executives (5 June)
- Online sessions with teams from each of the local authorities
- Online sessions with teams from Experience Oxfordshire and Cotswolds Plus
- 30+ 1:1 consultations with various stakeholders
- Online business and community survey

VISIONING WORKSHOP

A visioning workshop was held at the beginning of the project to tease out the ambitions and requirements of a pan-Oxfordshire Vision and DMP. The session looked at what good growth should look like and how these outcomes will be achieved.

- A summary of key findings from the workshop was that there was:
- Lots of consistency in stated priorities
- Recognition that the DMP is an important strategy document to chart the development of the visitor economy

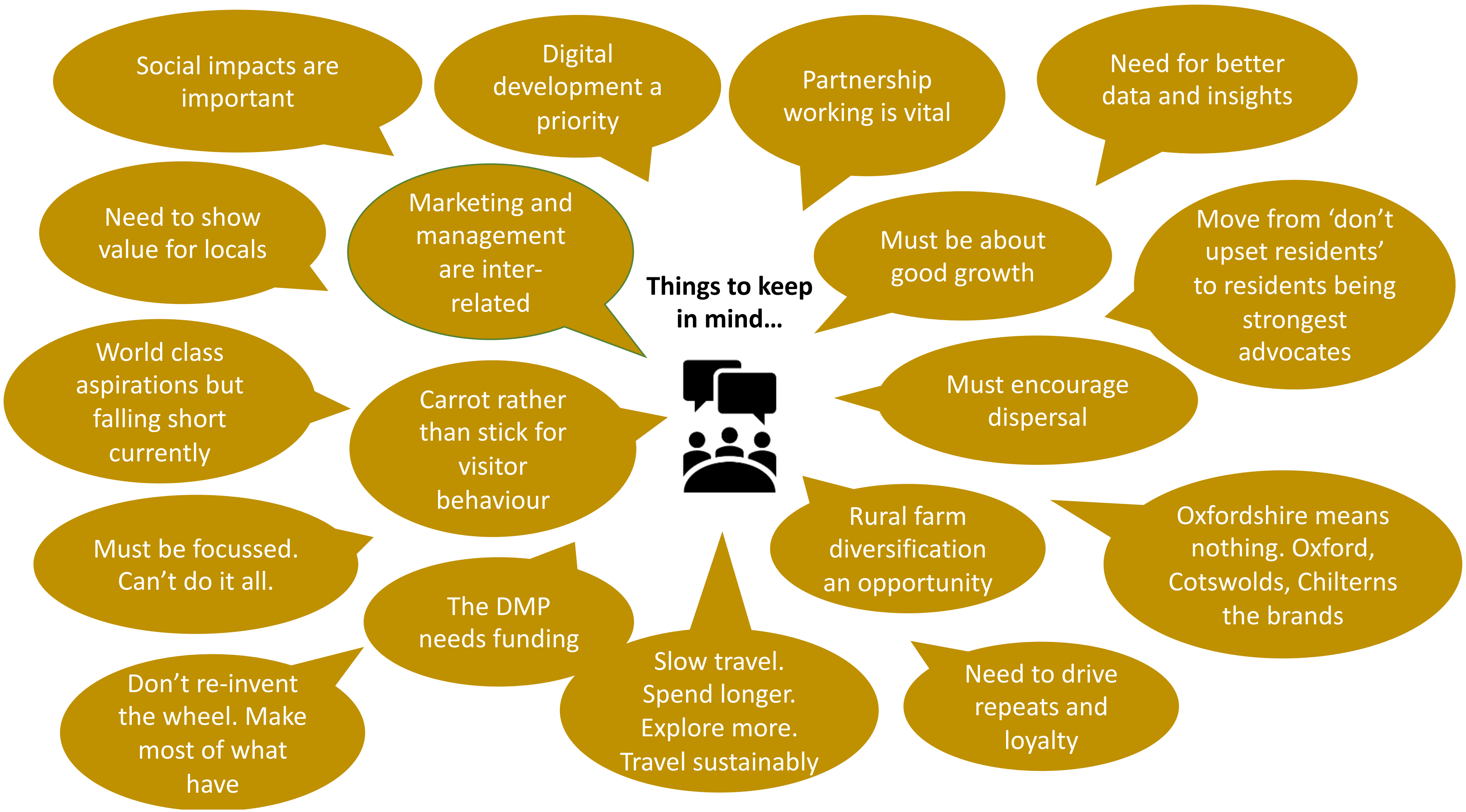
- An opportunity to bring coherence and co-ordination to efforts to develop the visitor economy
- A need to align this work with the wider Strategic Economic Plan
- All areas and communities in Oxfordshire need to benefit from the visitor economy
- There needed to be more focus on destination management (as well as marketing) and broader engagement and representation of the whole visitor economy.



CONSULTATION AND STAKEHOLDER WORKSHOPS FINDINGS

A full list of participants at the workshops and consultation sessions as well as the local authority and DMO sessions is attached at appendix A. The main findings are summarised under three areas displayed here and on the following pages:


Strengths to build on…
Business Tourism a growth opportunity
Packaging of experiences
Itineraries key to value and dispersal
Arts, culture and strategic events planning
National Landscapes, National Trails & wellness
Reputation as a sustainable destination
Strengthen market towns ‘not spots’
University more involved in tourism
LVEPS key to management and marketing
Make more of city’s neighbourhoods
Could make more of the waterways
Pipeline projects all strengthen the offer
International markets important but keep sticky
More mid-market accommodation to grow value
Make more of local and authentic (food & drink)


Things to keep in mind…
Social impacts are important
Digital development a priority
Partnership working is vital
Need for better data and insights
Need to show value for locals
Marketing and management are inter-related
Must be about good growth
Move from 'don't upset residents' to residents being strongest advocates
World class aspirations but falling short currently
Carrot rather than stick for visitor behaviour
Must encourage dispersal
Must be focussed. Can't do it all.
The DMP needs funding
Rural farm diversification an opportunity
Oxfordshire means nothing. Oxford, Cotswolds, Chilterns the brands
Don't re-invent the wheel. Make most of what have
Slow travel. Spend longer. Explore more. Travel sustainably
Need to drive repeats and loyalty

BUSINESS & COMMUNITY SURVEY

During May and June 2023, Blue Sail hosted a short online survey to gather the views of businesses and other stakeholders (including community groups) within Oxfordshire's visitor economy in order to understand the resulting actions they would like to see from the new Destination Management Plan for the county. The survey was distributed by OxLEP and partners and 30 people responded. Results are indicative due to sample size; a summary of the findings is outlined below:

- Endorsed by 90% of respondents, the city of Oxford (including the University of Oxford) tops the list of the county's strongest assets in attracting visitors. This is closely followed by history and heritage at 87%. Four in five say characterful towns and villages play a positive role in bringing visitors to Oxfordshire, while museums and galleries are seen as a key draw for visitors by almost three-quarters. Placed at the lower end of the list of attractors are food and drink (30%), shopping (27%), accommodation (23%) and quality facilities for conferencing/meetings (10%).
- Respondents give Oxfordshire's visitor economy an at best 'lukewarm' endorsement across a range of key success indicators – including visitor welcome, reputation for sustainable tourism, and workforce skills. On most of these indicators, 'agree slightly' is the main response. However, when it comes to accessibility and inclusion, marketing resources, and advice on growth, at least a third of respondents 'disagree strongly' that the county's performance is positive in these areas. The overarching implication of these findings appears to be the need for more co-ordinated and active management of the county's visitor economy, including support to empower local businesses to develop and market their offer.
- When it comes to visitor behaviours respondents would like to encourage more overnight stays (70%) and seasonal spread (67%) are the main areas of focus. Increased use of hospitality (60%), experiencing the evening economy (60%), and longer overnights (53%) and are also behaviours a majority would like to foster more among future visitors.
- When prompted with a list of ideas to leverage the economic impact that students at Oxford's universities could have on the county's visitor economy, 72% of people surveyed believe more should be done to encourage friends and families visiting students to stay overnight. A student ambassador scheme which incentivises those studying in Oxford to encourage friends and family to visit the county is also a popular idea, endorsed by 62% of respondents. However, less than a third believe that discounts or a loyalty scheme for students from local retailers and businesses would help to grow the visitor economy.
- Respondents believe that visitors within close proximity to and those living within Oxfordshire should not be overlooked as future growth audiences over the next five years. 73% believe people living within a two-hour travel time are an important market for growing the value of Oxfordshire's visitor economy over the next five years and 60% say targeting people living within the county would have a beneficial effect on generating value.

Attracting visitors from the rest of the UK (60%) and visitors from overseas (57%) is also seen as important to driving future value – with overnight visits the likely key opportunity. The USA, Asia, the Middle East and Europe are seen as the key overseas markets to target.

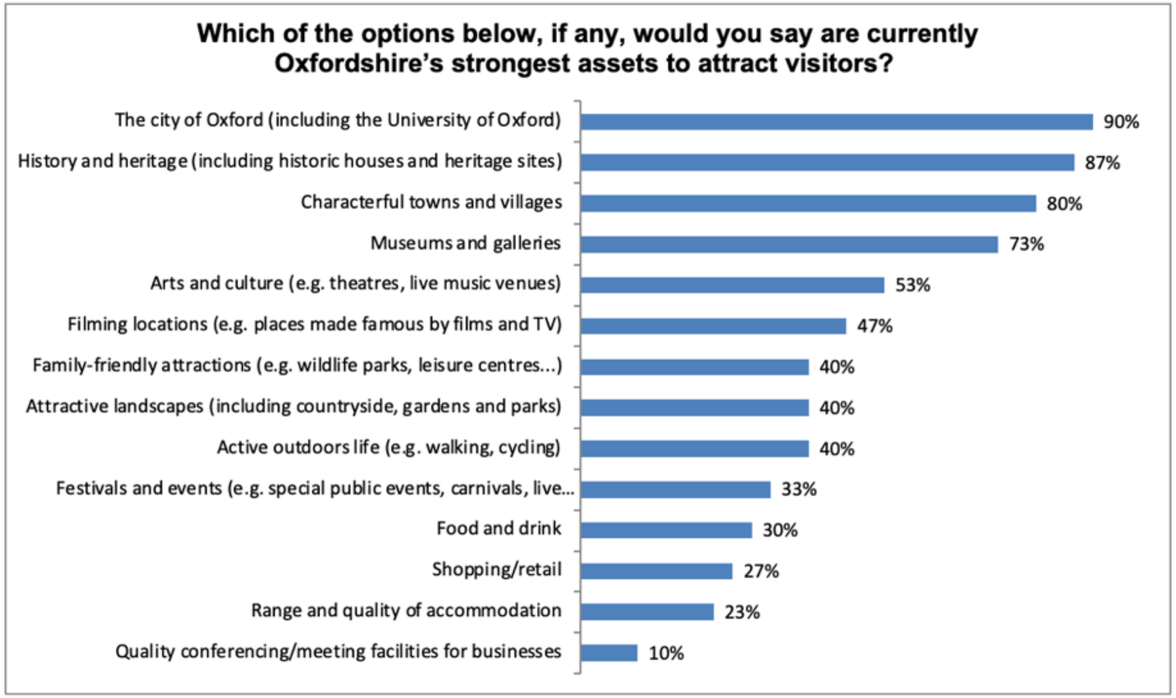
- Families – and particularly multi-generational families – are seen as a key growth opportunity by the majority of respondents. Outside of families, the emphasis appears to be around driving growth overall, rather than targeting a particular visitor demographic. Therefore, helping stakeholders to understand more about best prospect markets and their motivations for visiting Oxfordshire will be important in supporting them to prioritise activity around develop their visitor offer and marketing activity. 45% of respondents believe business travellers are a growth market
- Generating increased visitor spend is cited as the number one outcome from a successful DMP.
- More joined-up working between visitor economy businesses and local authorities is mentioned as the main way to raise the quality of the visitor offer and drive growth. Improved orientation, accessibility and sustainable transport are seen as key in encouraging people to experience more of the county. Oxford is seen as a key point of entry here. Sustainable transport routes that are easy to access and give people choices and which open up the county for visitors are also seen as important to future growth.
- An improved transport infrastructure and a high-quality visitor welcome are the two most important investment priorities for growing Oxfordshire's visitor economy (each endorsed as 'very important' by 72% of respondents). Next in priority is resources to support accessibility and inclusion (55% 'very important'). Respondents also see the benefits of collaboration and of developing a stronger understanding of visitors with 52% saying resources to support shared marketing activity are very important and 48% calling for better insights and research. Support to improve digital skills is considered as less of a priority, with only 28% seeing it as very important. Incentives and advice for businesses to adopt sustainable practices is also relatively low at 21%. This may indicate that a case needs to be made for communicating the benefits of digital touchpoints as a way of connecting with visitors even more effectively and reassurance that business investment in sustainability is key in enabling the county to achieve its ambitions in tackling the climate crisis.
- Respondents understand the positive impact the county's visitor economy can deliver for the local community across a range of socio-economic benefits. These include: how investment to improve visitor facilities also benefits the local community (79% 'agree strongly'); the visitor economy's role in improving local people's prosperity through encouraging investment (69% 'agree strongly'); and the importance of the visitor economy as a source of local employment (66% 'agree strongly'). In addition to economic impact, 61% of respondents also strongly agree that there are important social, cultural and educational benefits from welcoming UK and international visitors to Oxfordshire.
- Alongside the obvious benefits of a vibrant visitor economy, there is also recognition of some of the negative impacts of the visitor economy for local people. Perceived to be most pressing is the need for a strategy to manage the effects of tourism on traffic congestion (62% agree strongly).

Managing the impact of tourism on the availability and expense of residential accommodation is seen as a vital issue among 45% of respondents, while 38% strongly agree that more needs to be done to address local people's concerns about the environmental impact of tourism.

Data from the key survey questions is included below:

Oxfordshire's strongest visitor assets

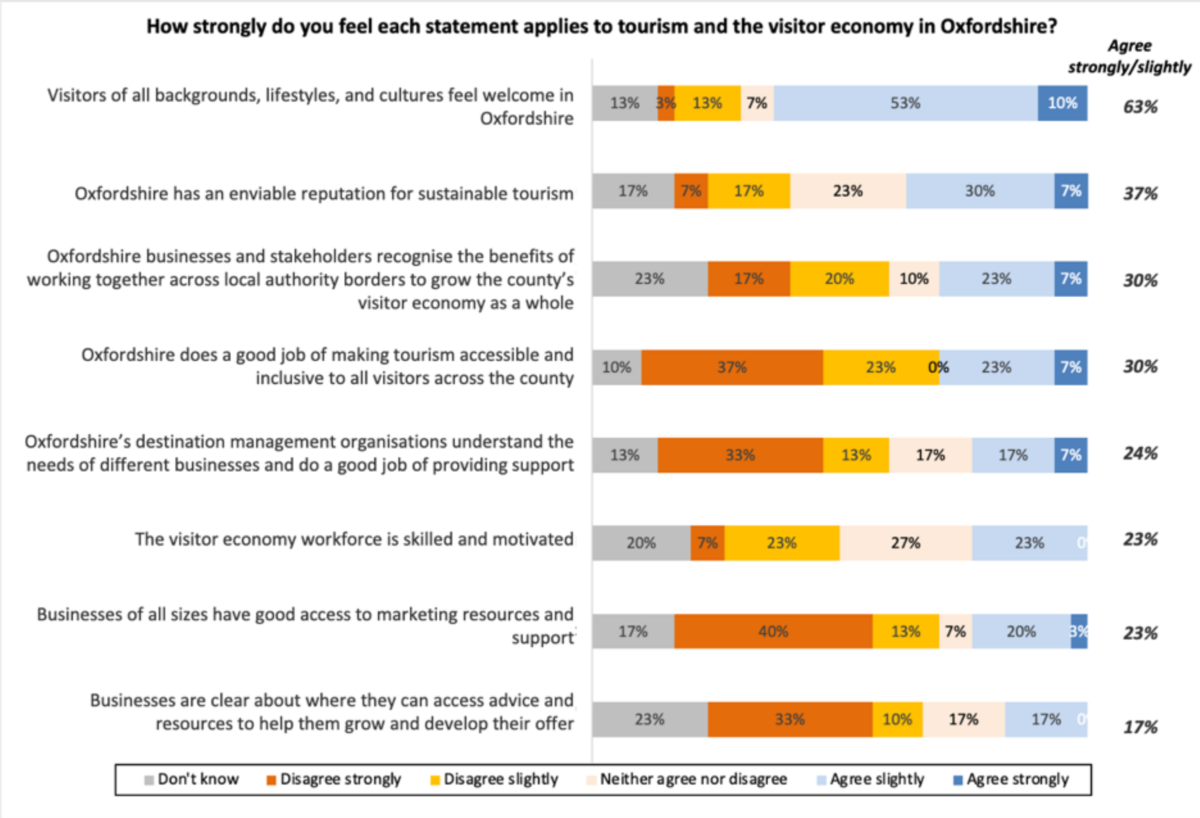
The city of Oxford (including the University of Oxford) is viewed as the county's strongest asset in attracting visitors. Other strong reasons to visit are evidenced through the county's history and heritage, its towns and villages and cultural offer – particularly museums and galleries. Experiences associated with Oxfordshire's outdoors offer are 'mid-ranking' attractors, with food and drink, retail and accommodation being seen as having a less prominent role in bringing people to Oxfordshire. Only one in ten mention quality facilities for business tourism as an asset given the current lack of large-scale provision within the county.

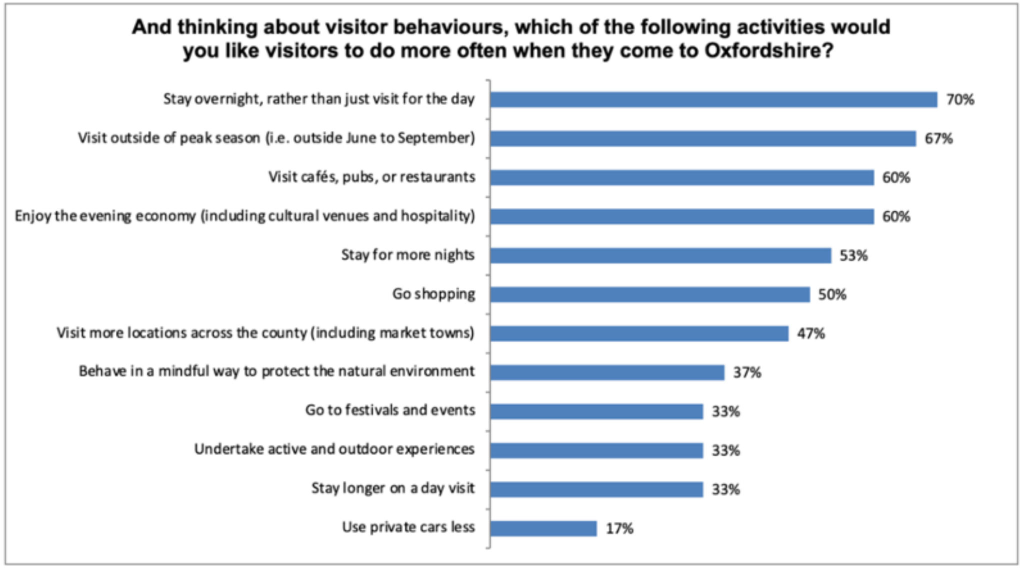


Perceptions of Oxfordshire's visitor economy

Respondents appear to have a 'lukewarm' attitude towards the current performance of Oxfordshire's visitor economy. Only a minority 'strongly agree' with any of the prompted statements; the most common response is to 'agree slightly' and there is also relatively high endorsement of 'don't know'. The pattern of responses suggests stakeholders believe that Oxfordshire's visitor economy would be strengthened by more active and collaborative destination management to improve the visitor offer and to support businesses more in delivering the offer.

There is an opportunity to strengthen responses across the range of key indicators. However, visitor accessibility/inclusion and business support (including DMO support, marketing resources and growth advice) are the areas where there is least confidence in the current arrangements. In fact, more than a third 'disagree strongly' that Oxfordshire's visitor economy performs well in these areas.

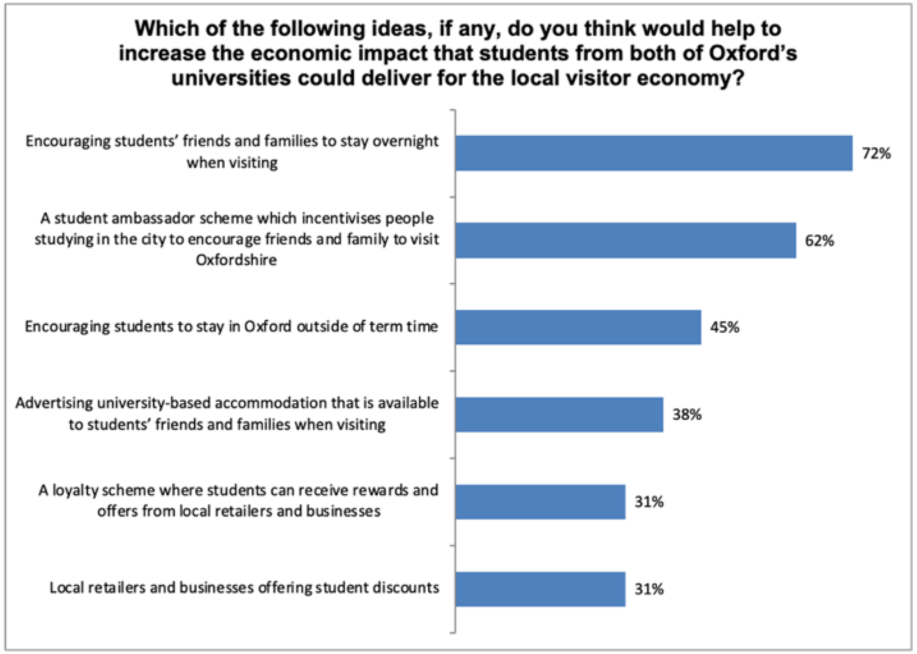




Visitor activities: opportunities for growth

While respondents believe that close-by and local visitor markets should not be overlooked, encouraging overnight stays is the number one visitor behaviour they would like to see more of over the next five years. Encouraging more out-of-season visits comes a close second. Both of these behaviours will be important in generating greater value from visitors. Greater visitor engagement with hospitality and the evening economy are also seen as key behavioural levers to pull and may help to make overnight visits, in particular, a more relevant and attractive proposition.

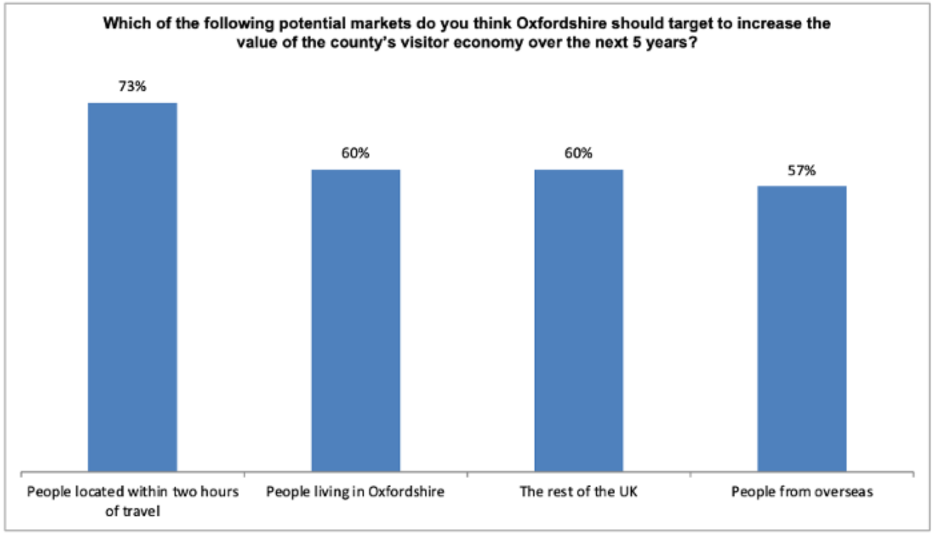
Students of Oxford's two universities are also considered as offering growth potential for the county's visitor economy. The majority of respondents believe more should be done to encourage friends and families to stay overnight when visiting students. Additionally, a student ambassador scheme which incentivises those studying in Oxford to encourage friends and family to visit the county is also a popular idea. However, less than a third believe that discounts or a loyalty scheme for students from local retailers and businesses would help to grow the visitor economy given the economic pressure this may place upon (often small) local businesses.

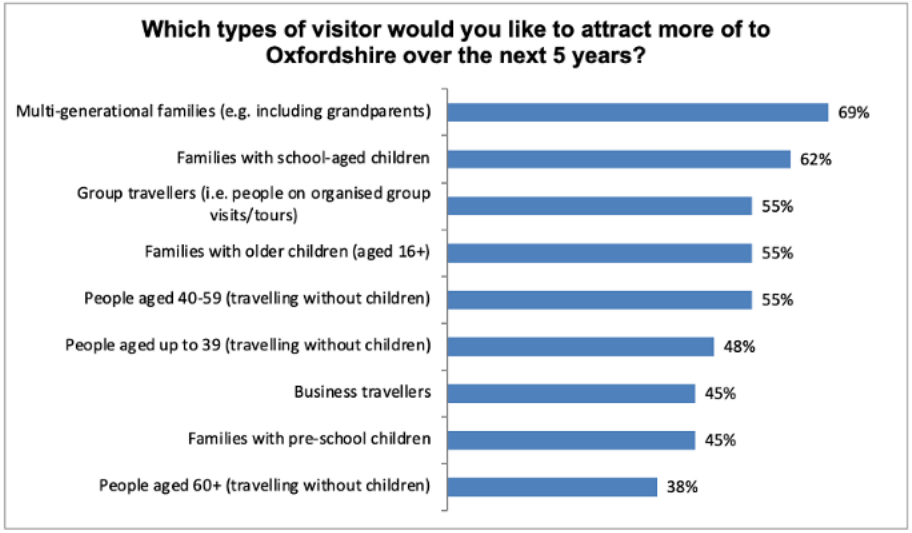


Visitor growth markets

When asked to identify visitor markets with the most growth potential for Oxfordshire over the next five years, respondents believe that visitors within a relatively local catchment are important (i.e. those located within two hours of travel and also people living within the county). Encouraging these visitors to experience more of Oxfordshire – particularly with longer and more varied day visits, and by converting day visits to overnights – could deliver greater economic impact. There is also likely to be community engagement benefits in making Oxfordshire's visitor economy as accessible as possible to residents. Visitors from further afield in the UK and overseas are also seen as having an important role to play in growing the value of the county's visitor economy. A focus on more overnight visits and extending length of stay is likely to be a key value driver for these audiences. The USA, Asia, the Middle East and Europe are seen as the key overseas markets to target.

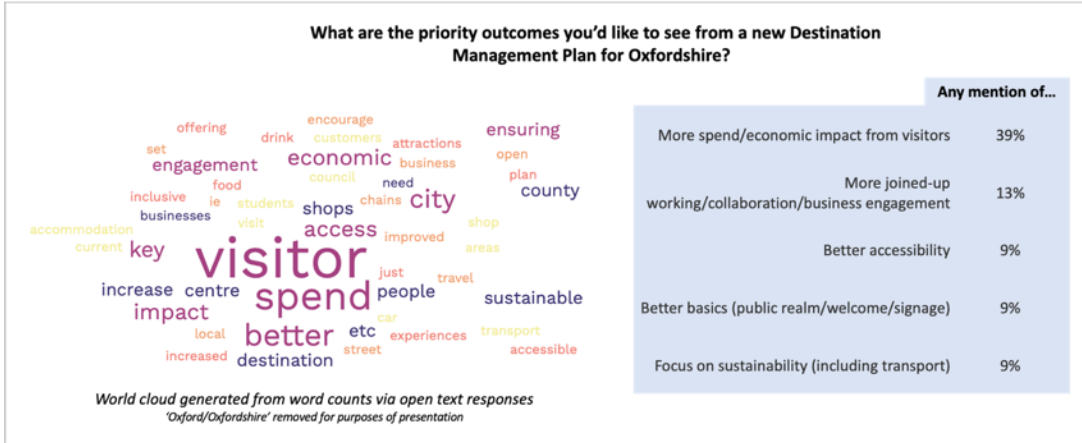
While families are identified as key growth opportunity – particularly multi-generational families (who will likely enjoy experiencing the breadth of the county's visitor offer) – respondents appear to be agnostic about where growth may come from; rather it appears that Oxfordshire is perceived as having the potential to a broad range of demographics. Therefore, overlaying the thematic strengths of Oxfordshire's offer with the motivations of best prospect visitor segments for the county will be the most effective way to inform priorities for marketing and experience development to attract these markets.

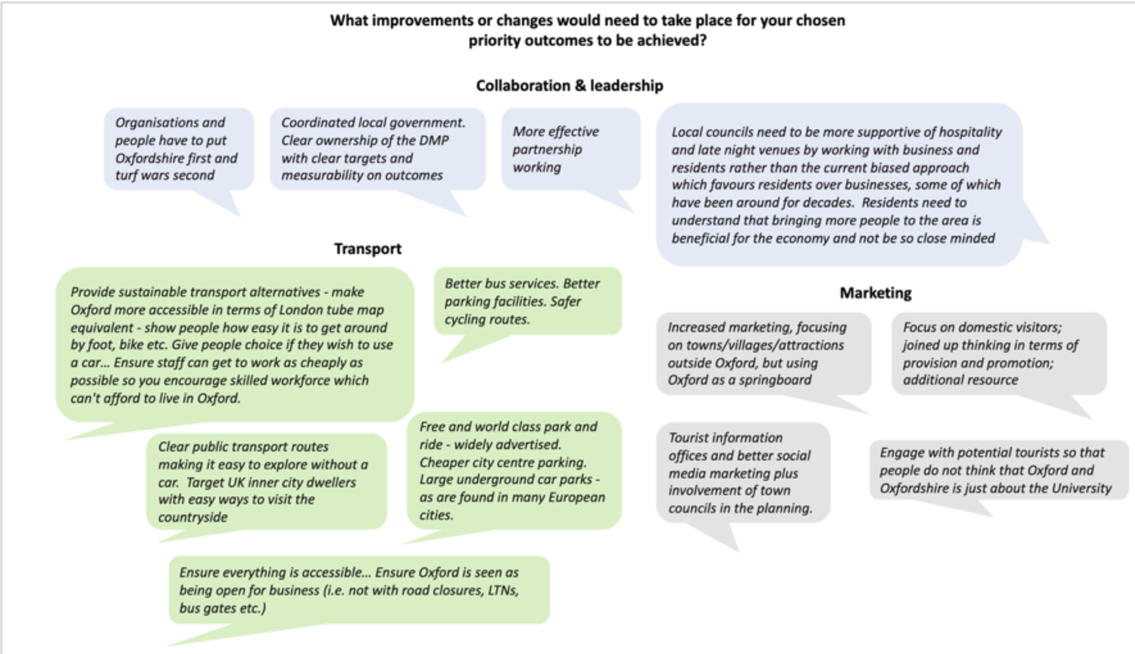




Priority outcomes from the DMP

Generating increased visitor spend is cited as the number one outcome from a successful DMP. More joined-up working between visitor economy businesses and local authorities is mentioned as a way to raise the quality of the visitor offer. Improved accessibility and better basics including welcome and orientation, and sustainable transport are seen as key in encouraging people to experience more of the county.





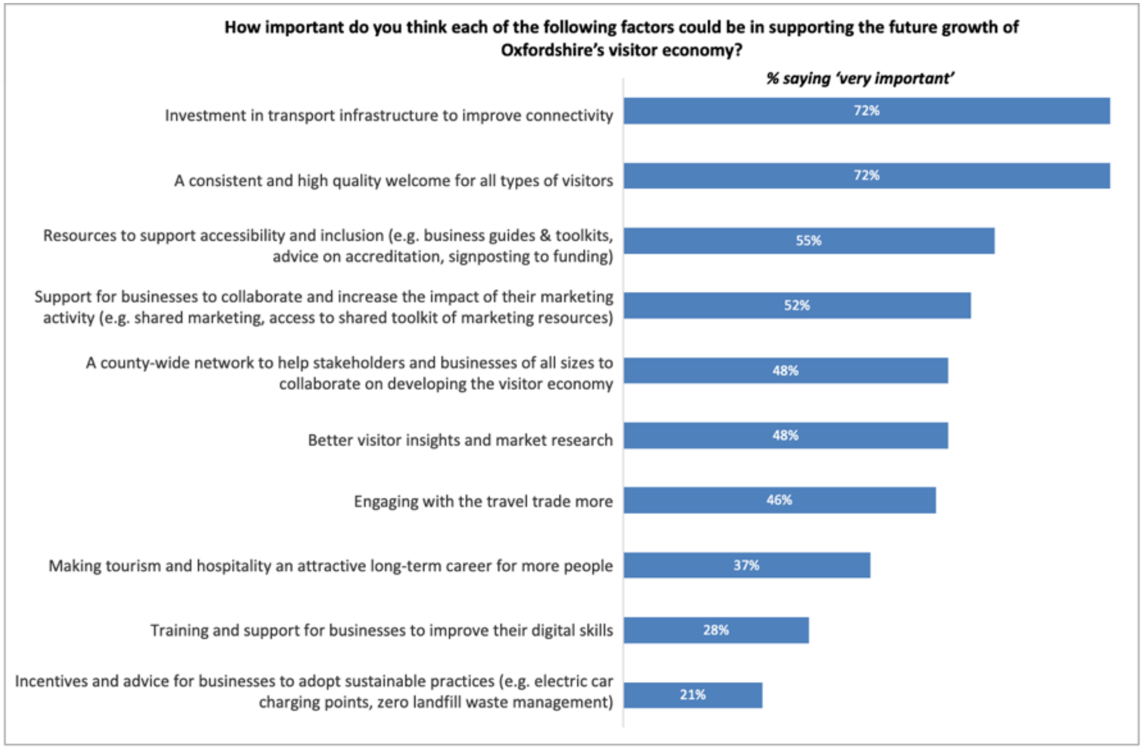
Collaboration – including businesses and councils working more closely together – is seen as one way to support successful delivery of the DMP. Sustainable transport and transport networks that make Oxford and the rest of the county navigable are cited as important success factors also. Mentions of marketing talk about the benefits of collaborative activity and encouraging visitors to experience more of the county.

Actions to support the growth of Oxfordshire's visitor economy

An improved transport infrastructure and a high-quality visitor welcome are the two key investment priorities for growing Oxfordshire's visitor economy. Accessibility and inclusion is also seen as significant.

Outside of the above, factors which support effective collaboration via shared marketing, county-wide networking, effective insights and engagement with the travel trade are endorsed as important priorities. More than a third of respondents believe activity to make the sector more attractive as an employer is 'very important', with another 57% saying this is 'quite important'. Therefore, the need for a long-term approach to growing the workforce should not be underestimated.

Support to improve digital skills is and incentives to encourage businesses adopt sustainable practices are considered relatively less of a priority. This may indicate that a case needs to be made to help businesses understand that more effective digital touchpoints can support their priority goals around visitor welcome and accessibility.



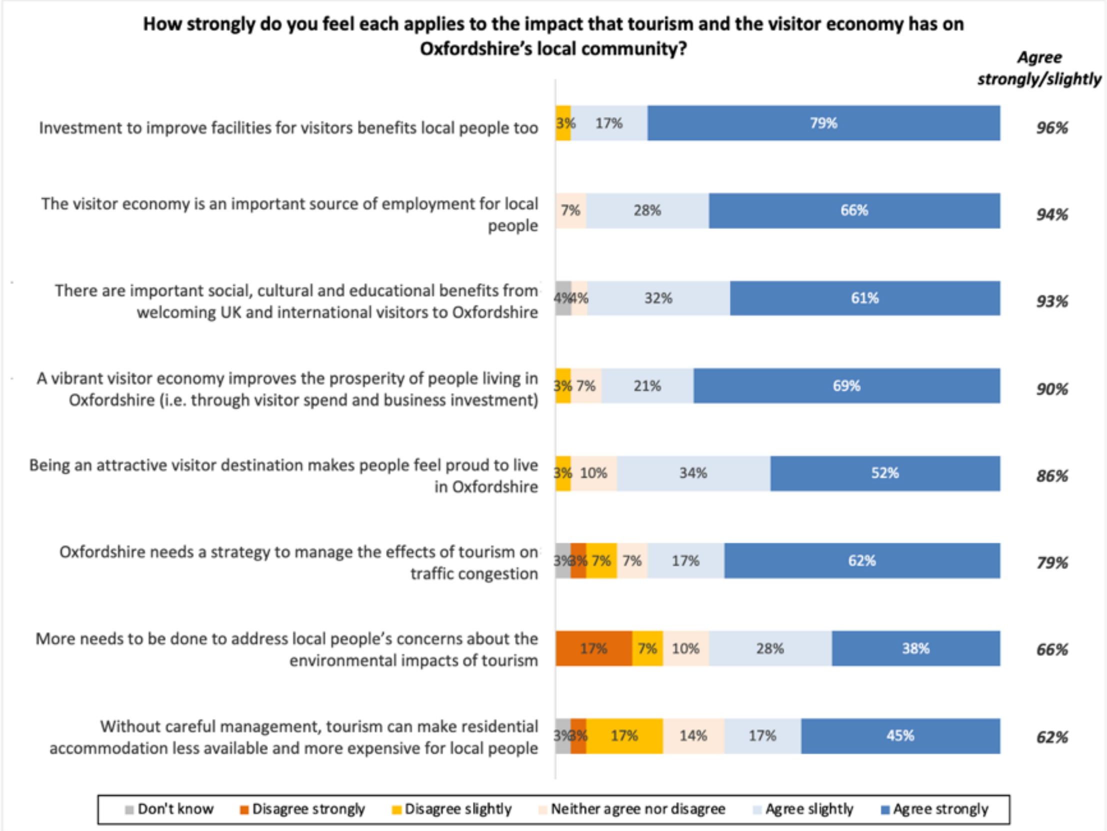
Furthermore, alongside being a key driver of tackling the climate emergency, greater adoption of sustainable practices can enhance Oxfordshire's reputation as a 'green' destination. Hence, there is likely an opportunity to demonstrate to businesses how their actions, no matter how small, can support the county's overarching strategic aims around sustainability.

The community impact of Oxfordshire's visitor economy

Respondents understand the positive impact the county's visitor economy can deliver for the local community across a range of socio-economic benefits. They also believe Oxfordshire residents can feel a sense of pride in living in a county that is also an attractive destination for visitors.

In terms of negative impacts resulting from tourism and the visitor economy, traffic congestion is seen as the most acute. Mitigating against the effects of tourism on the supply and cost of residential accommodation is an issue of some importance for almost two-thirds of those surveyed. Addressing residents' concerns around environmental impacts is also pressing for a similar number. However, almost a fifth 'strongly disagree' that more should be done in this area, which may be a symptom of some stakeholders seeing residents as being 'close-minded' about the growth and development of the visitor economy.

This therefore suggests that any community engagement activity needs to carefully balance communicating the benefits of a vibrant visitor economy and future growth plans alongside clear evidence about how environmental impacts will be mitigated against; thus supporting business growth and fostering resident buy-in.



APPENDIX A – PARTICIPANTS IN ENGAGEMENT & CONSULTATION

VISIONING WORKSHOP

John Hoy – OxLEP Culture & Visitor Economy Stakeholder Group (CVESG) and independent heritage consultant	Miranda Markham – Bicester Village	Nigel Tipple – CEO, OxLEP
Peter Lugosi – Oxford Brookes University	Suzanne de la Rosa – Oxford Uni (Gardens Libraries & Museums)	Paula Redway, Culture & Community Development Manager for Oxford City Council
Karen Roberts – South & Vale DC	Kevin Kaley – Consultant (representing Experience Oxfordshire)	Helen Ryan-Wallis, OxLEP
Ian Boll, Corporate Director for Communities, Cherwell DC	Vicky McGuinness, Oxford Uni (Head of Public Engagement)	Ted Maxwell, Economic Development & Green Transport for Oxford City Council
Tom Bridgman, Executive Director of Development for Oxford City Council	Caroline Jones, Story Museum	

1:1 CONSULTATIONS

Stuart Crook – Wellers Accountants (EO Board)	Cllr Duncan Enright – Oxfordshire County Council (EO Board)	Joanna Davidson – EO Chair
Hayley Beer-Gamage – EO	Chris Wigg – St Anne's College	Andrew Lister – The Mill Arts Centre Banbury
Ant Greenway – Stonor Park	Jayne Manley – The Earth Trust	Niall McWilliams, Jon Clarke and Adam Benson – Oxford United FC

Sarah-Jane Curtis – Bicester Motion	Miranda Markham – Bicester Village	Dominic Hare – Blenheim Palace
Simon Townsend – Banbury Museum	Caroline Jones – Story Museum	Paul Hobson – Modern Art Oxford
Bob Price – former Leader Oxford City Council	Claire Ford - VisitEngland	Diane Montrose – Wake up to Woodstock
Luke Marion – Oxford Bus Company	Fran Downton – Tourism South East	Estelle Bailey – Berkshire, Buckinghamshire and Oxfordshire Wildlife Trust
Annette Weiss – Chilterns AONB	Andy Parsons – Cotswolds AONB	Diana Fawcett – Oxford City Centre Manager
Brendan Hattam – Westgate Oxford	Suzanne De La Rosa – University of Oxford	Dr Victoria McGuinness – University of Oxford
Nicole Ferdinand – Oxford Brookes University	Paul Southouse & Bernadette Evans – Jericho Traders Association	Laura Price – Oxfordshire Community & Voluntary Action

LOCAL AUTHORITY SESSIONS

West Oxfordshire District Council 10 May		
Will Barton – Economic Development	Chris Hargraves - Planning	Hannah Kenyon – Climate Change
Chris Jackson - Tourism	Sophie Long – Cotswolds Plus	
Cherwell District Council 24 May		
Steven Newman – Economic Development	Nicola Riley - Culture	Tara Murtagh-Stewart – Arts
Philippa Tatham – Visitor Economy	Chris Thom – Planning	
South & Vale 18 May		
Karen Roberts – Economic Development	Nick King – Economic Development	Abigail Brown – Arts & Culture

Alison Williams – Economic Development	Karen Tolley – Economic Development	
Oxford City Council 23 May		
Paula Redway – Culture	Ted Maxwell – Economic Development	Tom Morris - Planning
Diana Fawcett – City Centre Manager		
Oxfordshire County Council 17 May		
Robin Roger – Partnerships & Delivery	Dawn Pettis – Strategic Planning	Benjamin Smith – Infrastructure/Transport
Jemma Davey - Museums		

DMO SESSIONS

Cotswolds Plus 10 May		
Chris Jackson	Sophy Long	Sally Graff
Emma	Lyndsay Purdie	
Experience Oxfordshire 17 May		
Hayley Beer-Gamage	Lesley Wright	Jenny McGee
Kevin Kaley		

STAKEHOLDER WORKSHOPS

Courtyard by Marriott (Abingdon South) 18 May

Karen Roberts – South & Vale DC	John Hoy – Heritage Consultant	Giles Hughes – West Oxfordshire DC
Hannah McDonnel – Oxfordshire Community Rail Partnership	Lesley Wright – Experience Oxfordshire	Jenny McGee – Experience Oxfordshire
Kim Hallet – Kim Hallet Consulting	Kate Ji – Oxford Brooked University	Robin Tucker – Coallition for Healthy Streets and Active Transport
Geron Swann – Film Oxford	Ian Green – Oxford Civic Society	Darren Evans – Dylogic
Jeff Hunter – Courtside Hubs CIC	John Wynne - Crucible	Qing Yan – JKDRG
Andrew Pritchard – Oxford Civic Society	Liz Morrison – Happiness Horseboxes	Jonathan Clarke – OUFC
Sophy Long – Cotswolds Plus		
Online Session 25 May		
Andrew Down – Future Oxfordshire Partnership	Andy Parsons – Cotswolds National Landscape	Dave Lewis – Earth Trust
Kevin Kaley – Consultant (on behalf of Experience Oxfordshire)	Diana Fawcett – Oxford City Centre Manager	Helen Ryan-Williams - OxLEP