



*Rural England at its Finest*

# Tourism Strategy

West Oxfordshire District Council

2009–2012





## Foreword



Tourism is very important for West Oxfordshire generating around £225 million a year to the local economy and supporting some 4,000 jobs. Its development is critical to our future prosperity.

This strategy is about West Oxfordshire District Council's work in promoting tourism and supporting those working in the industry so that our local economy continues to benefit.

Key to the development of tourism is sustainability. I am proud that West Oxfordshire is leading the way on green tourism and that this strategy paper outlines how we will work to help protect the natural assets in our District.

I feel privileged to live and work in such a beautiful area, surrounded by lovely countryside, historic towns and villages, a wealth of attractions and home to a world heritage site. Because of this our District holds significant appeal attracting four million visitors each year.

Our challenges are to encourage visitors to stay longer, spend more and come back again in the future. I am confident that this strategy sets the way forward to do this.

**Cllr Barry Norton,**  
**Leader of West Oxfordshire District Council**



Tourism brings in significant value each year to the District and enables improved service provision to take place that also benefits the residents of the District.

West Oxfordshire is branded as the **Oxfordshire Cotswolds** and I truly do believe that it is 'Rural

England at its Finest.' The brand is now well developed and is promoted to both domestic and overseas markets. However we need to ensure that the Oxfordshire Cotswolds is seen as 'must see' visitor destination and develop the product further in order to compete with other destinations, which is what this strategy seeks to do.

Through this strategy the District Council takes the strategic lead for tourism, however the outcomes cannot be achieved in isolation and working with the local industry and other partners is essential for its success.

Working alongside the Tourism Development Team and Visitor Information Centres, this strategy will offer the visitor a continuing warm welcome to the District and ensure the visitor experience is one of quality.

The future of the tourism industry is not one that can be predicted and it is an industry that is vulnerable to changes in the external environment. However it has also been identified as a growth area moving forward and in a time of economic recession tourism is a real opportunity to sustain and build the local economy and support local jobs.

The launch of this new 2009 – 2012 Strategy shows the Councils commitment to delivery of tourism services and support to the local industry to create a sustainable, valuable economy from which we will all prosper.

**Cllr Hilary Biles,**  
**Cabinet Member for Leisure, Tourism, Health,**  
**Children and Young People**



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## Executive Summary

This Tourism Strategy represents West Oxfordshire District Councils vision for tourism development between 2009 and 2012. The strategy shows the continued commitment of the Council in delivering the Tourism function. The Tourism Strategy aims to create a strong framework which can be built upon to continue to raise the profile of tourism and its related activities across West Oxfordshire.

This Strategy identifies the economic benefits of embracing tourism, and is supported by a strategic tourism policy. It sets out a number of action points required to develop tourism over the next three years, and identifies the need for public and private investment and partnership support to achieve maximum economic gain for the District.

The Tourism Strategy is not a stand alone document. The principles and proposals highlighted are linked to the Council Vision to; **Maintain and enhance West Oxfordshire as one of the best places to live, work and visit in Great Britain**; and also the priority of; **Encouraging tourism, leisure and cultural opportunities for all**. It is also linked to external policy and strategy such as; The Visit Britain Tourism Review, Strategies developed by the Department of Culture, Media and Sport, SEEDA and Tourism South East. This will ensure the Strategy satisfies a local, Regional, National and International brief.

Since 1999 when the last Tourism Strategy was produced visitor spend in West Oxfordshire has increased significantly and it is now estimated that visitor spend in the district through tourism related activities is nearly £225 million per annum, highlighting the value of supporting tourism for the local economy. Visitor spend when the last tourism strategy came to a close in 2004 was estimated to be £191 million per annum. Therefore there has been significant growth since this time of nearly 15% despite significant external factors affecting the tourism industry

such as Foot and Mouth and the severe flooding of 2007.

Further to this the tourism environment has changed considerably since the implementation of the last strategy and there is a much greater reliance on technology to implement destination marketing and communication. The Council recognised this and in 2007 invested considerably in a Destination Management System and website for the Oxfordshire Cotswolds which has to date been highly successful, attracting large numbers of visitors nationally and internationally.

As a result of research and consultation the Tourism Strategy very much focuses on a Value not Volume agenda, whereby we are aiming to get visitors to stay longer and spend more rather than only increasing visitor numbers. This will lead to a more sustainable approach to tourism development. Therefore the over arching aim of the strategy is:

***“To develop and promote the Oxfordshire Cotswolds as a must see visitor destination and further develop sustainable tourism in West Oxfordshire to enhance the quality of life for local people whilst encouraging visitors to come to the area, spend more, stay longer and return.”***

As a result eight key priority areas have been identified for Tourism Development in order to achieve this;

- 1 Co-ordination of Tourism Partners**
- 2 Marketing of the Oxfordshire Cotswolds**
- 3 Information Provision**
- 4 Quality**
- 5 Environment**
- 6 Employment, Training and Business Support**
- 7 Research**
- 8 Future Opportunities**





## Introduction

Tourism continues to be increasingly important to the British economy. Overall tourism is expected to grow in importance and has been highlighted as the only sector to see considerable growth over the next 50 years and West Oxfordshire is well placed to share in this growth. The District Council wishes to play its part in attracting visitors to the local area but this will require strong co-ordination and partnership between the private and public sector. This Tourism Strategy has been produced to ensure that this co-ordination happens.

The strategy covers the period from 2009 to 2012 and has an aim of developing partnerships in order to maintain and increase the contribution that tourism can make to the district's economy and the 'quality of life' in the area without endangering the environment.

The strategy will look at tourism and the visitor economy and why it is important and set it in context nationally, regionally and locally. From there the justification for why we need a strategy is explained and what the role of the District Council is in this. It then examines the research that was carried out in order to develop the strategy, before detailing the specific vision and objectives for tourism in West Oxfordshire.

The actions which are included in the action plan are largely those that can be directly influenced or achieved by West Oxfordshire District Council, although it is hoped that tourism businesses and other bodies will contribute to the delivery of strategic objectives through their own business planning processes.

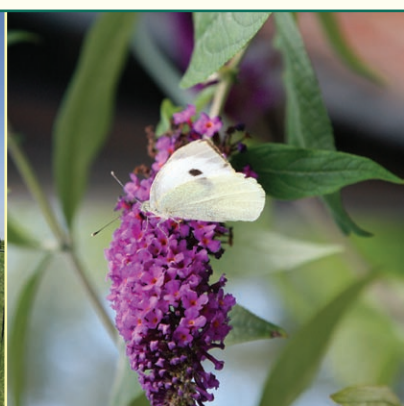
### Setting the Scene

West Oxfordshire District is situated in the South East region of England and comprises of many attractive market towns and villages in a largely rural setting. One third of

the area is also a designated part of the Cotswolds Area of Outstanding Natural Beauty. It is these features together with the proximity to main access roads and other key destinations which contribute to the high level of visitors to the area.

The District is however continually changing and the West Oxfordshire of 2009 is very different to the West Oxfordshire of 1999–2004 when the last Tourism Strategy for the District was published. Spend in the area has increased by over £33 million per annum and the increased use of the internet has had significant impact on destination marketing and place shaping. The Council recognised this change in external environment and trends and as a result in 2007 invested significantly in a Destination Management System (DMS) and new website with online booking facility.

The Oxfordshire Cotswolds website [www.oxfordshirecotswold.org](http://www.oxfordshirecotswold.org) has been designed to give the visitor all the information that they need to plan a visit to the area. It includes; a comprehensive events listing, quality assured accommodation, attractions, activities, food and drink, local area information and travel information. All accommodation, attractions and events are searchable by area. Accommodation can also be booked online in real time. There is also a dedicated e-shop that sells local information and souvenirs. Included on the website is an itinerary planner where the visitor can package together activities of their choice and there are also several suggested itineraries for special interest. The website has gone from strength to strength since its conception in 2007, now receiving over 2.5 million hits per year and 120,000 unique visitors from over 50 different countries of origin.



Through having a DMS it also means that the Oxfordshire Cotswolds website is interoperable with the regional and national Tourist Board websites and therefore the information on our website feeds up to the Tourism South East website [www.visitsoutheastengland.com](http://www.visitsoutheastengland.com) and the Visit England website and [www.enjoyengland.com](http://www.enjoyengland.com) giving us wider coverage across all markets. The website also currently ranks within the top five searches on Google for Oxfordshire and Cotswolds.



## Tourism background

### What is tourism?

It is easy to misunderstand tourism by adopting too narrow a definition of the word. For the purpose of the Council's Tourism Strategy, tourism is defined as:

***“The temporary movement of people to destinations outside their normal places of work and residence, the activities undertaken during their stay in those destinations, and the facilities created to cater for their needs”***

(Mathieson and Wall)

It includes overnight stays and day-trips as well as longer stays. It takes into account all aspects of the visitor experience including day trips, short breaks, long holidays,

visiting for leisure or business from within the UK or from overseas and staying with friends and relatives.

However now the term ‘visitor economy’ and visitor is more widely used when describing the tourist industry as this enables us to capture all visitors to the area for their chosen activity and encompasses the whole visitor experience. It covers all of the things that attract visitors to an area, from the natural environment to sport to culture to food and drink. In fact everything that makes a place special. The term is more inclusive and by definition should include infrastructure - the road systems, signage and parking - and the service given to visitors, not just from hoteliers and attractions but the welcome from the taxi driver and so on.

## Why is it important?

Tourism is important because of the economic, social/cultural and environmental benefits that it can bring to an area. This is illustrated in the table below:

### Potential Benefits of the tourism Industry in the UK

Economic	Social/Cultural	Environment
Protects and provides a source of income for the natural and built heritage.		
Enhances the image of an area, attracting commercial investment outside the tourism industry as well, by demonstrating to potential investors that the place is good to locate to.		
A significant catalyst for economic growth and employment. Increases demand for other non tourism businesses	Leads to the creation and maintenance of local amenities	Draws attention to the need to protect the natural and built environment and encourages a more rigorous analysis of the importance of the local eco-system
Supports and helps to maintain local services, such as shops and restaurants		
Provides re-skilling, training and employment opportunities		
Provides supplementary incomes to those seeking second jobs, part time hours, unsocial hours		
Encourages residents to stay and spend leisure time		
Encourages upgrading and re-use of redundant land and buildings		
Brings expenditure from external sources into the local market	Supports a programme of events, arts, sports and other culture	
	Helps to build distinctive communities, thus increasing local pride and self confidence	
	Provides opportunities for social inclusion	
	Encourages cultural diversity	



However, while tourism can bring these opportunities and benefits, there are potential challenges that communities need to be aware of and develop strategies to address. This is illustrated in the table below:

*Potential challenges of the tourism industry in the UK*

Economic	Social/Cultural	Environment
Tourism is a diverse sector so co-ordination is complex and ongoing		
Tourism spending is dependent on economic, social and other factors. The value of the pound can have significant implications on inbound and outbound tourism.		Places strain on transport infrastructure, particularly roads and parking
An economic downturn in source countries can lead to a reduction in visitors which impacts on businesses in the short or long term depending upon the severity of downturn	Can be an unattractive sector for people entering the labour market because of unsocial hours, seasonal/ part time work	Can place additional pressure on sensitive local environments and therefore needs effective visitor management
Demand can be seasonal and variable over a weekly cycle, which impacts particularly on employment		
Requires all weather facilities and activities		
Is very competitive and increasingly sophisticated		
Requires ongoing engagement from local government		





## Tourism in the UK

### National Perspective

Tourism is the UK's sixth largest industry. New research commissioned as part of the British Tourism Framework Review revealed that tourism was worth £86 billion in 2007, directly employing 1.4 million people and representing 3.7% of GDP. Taking into account the overall contribution of tourism – indirect employment and economic benefit – tourism is worth £114 billion, is responsible for 2.65 million jobs and represents 8.2% of GDP in 2007. The Government recognised the importance of tourism in its first national tourism strategy 'Tomorrow's Tourism', published in 1999. The message of that strategy is that tourism is important to the economy and needs to be attractive and competitive. Furthermore a British Tourism Framework review has just been published (February 2009) and highlights the significance of the need for this important sector and the need for its continued support. Further focus has been put on promoting and developing England as a destination and Visit England has now been established with a strategy due to be launched the end of 2009.

### Regional Perspective

In terms of the South East tourism generates over £10 billion per annum in terms of visitor expenditure. It provides employment for more than 225,000 people which is around 8% of the region's workforce. Visitors to the UK spend three times as much money in the South East as in Wales, one and a half times as much as in Scotland and the South West.

In 2007 the volume and value of tourism in the south east was broken down as follows:

UK Residents			Overseas Residents		
Trips (millions)	Nights (millions)	Spending (£millions)	Trips (millions)	Nights (millions)	Spending (£millions)
17.9	50.0	2,353	4.5	32.1	1,578

Bed & Breakfast is a substantial contributor to the tourism industry and local economy, and the sector represents around half the total number of serviced accommodation establishments in the South East region.

### Local Perspective

From West Oxfordshire's perspective tourism is vital to the District's economy. The most recent economic impact study that was based on 2007 figures identified the following in terms of the volume of the market:

Tourism expenditure is worth £224.65 million per annum to the local economy. The distribution of expenditure is split as follows;

- Catering/Food and Drink – 35%
- Retail – 21%
- Transport/Travel – 17%
- Accommodation – 15%
- Attractions/Entertainment – 12%

Tourism is a substantial employer in the district and supports nearly 4000 jobs.

Nearly 3.7 million visitor trips were made to the District. Just over 3.2 million of these trips were day trips with the remainder being overnight stays. Notably the overnight stay visitors spend accounted for significantly more proportionally than the day visitors spend. Overnight visitors accounted for 33% expenditure, yet only represented 14% of visitors.





## Strategic Context

### What does this strategy do?

In order to assist all tourism related organisations across the District to contribute towards the success of the local industry it is necessary to develop a strategic approach to how services, facilities and activities might develop. This tourism strategy seeks to do this by:

- Setting out the District Council's vision for tourism which addresses the needs of the industry, the community and our visitors.
- Maintaining the high profile of tourism within the District and ensures that key decision-makers are aware of its importance and potential.
- Ensuring that the District Council's resources for tourism are effectively monitored.
- Providing a mechanism for evaluating the effectiveness, efficiency and value for money of District Council activity in the areas of tourism management, development and promotion.
- Ensuring that any tourism development is sustainable through strategic tourism management which ensures a quality visitor experience.

### How does tourism fit with West Oxfordshire District Council strategies and plans?

The growing importance of tourism to the District's economy is recognised in a number of Council documents. In particular the Council Vision and Priorities, The Council Plan, The Council Delivery Plan, Sustainable Community Strategy and the Local Development Framework which identify a number of strategic priorities, which will improve infrastructure and opportunities that support tourism activity.

### West Oxfordshire District Councils Vision and Priorities

The importance and value of tourism is highlighted in the Council's vision and priorities where tourism and the visitor economy are clearly embedded. It acknowledges that tourism benefits not only visitors to the area but also its residents and its workforce. The Vision of the Council is to:

*“Maintain and enhance West Oxfordshire as one of the best places to live, work and visit in Great Britain”.*

In order to achieve this vision, there are five priorities which each address issues which to achieve the vision. Many of these will have an impact on tourism. The five priorities are:

- To protect and enhance the environment.
- To sustain vibrant, healthy and economically prosperous towns and villages.
- To provide affordable housing.
- To encourage tourism, leisure and culture for all.
- To provide efficient, value for money services.

### Shaping Futures – a Sustainable Community Strategy for West Oxfordshire

This document sets out a shared 10-year vision for West Oxfordshire, and it reflects what local people have told the Council is important to them and to the District. Shaping Futures is an important document for everyone in the District, and meets the government requirement to produce a Sustainable Community Strategy (SCS).

Shaping Futures highlights nine key priority areas:

- The Community and the Economy
- Local Services
- Support for Young People
- Homes for Local People
- Health and well-being
- Transport
- Community Safety
- Support for Older People
- The Environment and Climate Change

Tourism and the visitor economy are embedded within most of these priorities, however there are specific actions around the Community and the Economy, Transport and The Environment and Climate Change.



## Local Government and Tourism

### The role of local government

Local government is a crucial player in the tourism industry. Local Authorities manage the natural and cultural resources that tourism relies on, provide core infrastructure, attractions and facilities, and often fund local marketing and visitor information services. Councils are the destination managers for the area they cover and it is their job to strategically manage the impact of visitors. This involves:

- Ensuring that the needs of today's customers are met in the provision of information and marketing through information technology
- Promoting the area as a tourism destination through "best fit" with brands and themes that raises the profile of the destination
- Enhancing the image of the area
- Supporting local businesses
- Promoting the area as a place to live, work and play
- Promoting the economic prosperity of the area
- Supporting public realm infrastructure such as roads, car parks, signage and public toilets
- Supporting Service developments such as trading standards, quality assurance, hospitality and retail

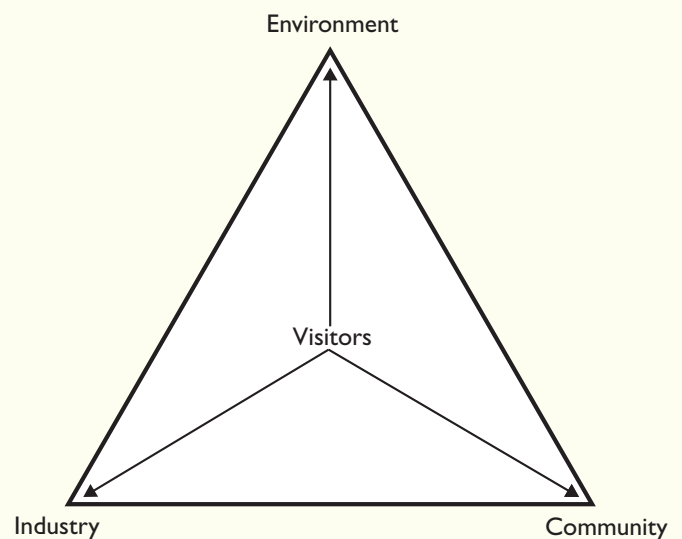
Tourism is however a fragmented industry and the District Council is only one of many organisations which contribute to it but its role is vital in co-ordinating private and public sector efforts to manage, develop, champion and promote tourism at every level.

### VICE Model

Councils need to balance the requirements of the tourism industry and other stakeholder groups, so this plan has been developed using the VICE Model for tourism development which incorporates visitor, industry, community and environmental considerations. This is summed up as follows:

Tourism development must

<b>Welcome, involve and satisfy</b>	<b>Visitors</b>
<b>Achieve a profitable and prosperous</b>	<b>Industry</b>
<b>Engage and benefit host</b>	<b>Communities</b>
<b>Protect and enhance the local</b>	<b>Environment</b>

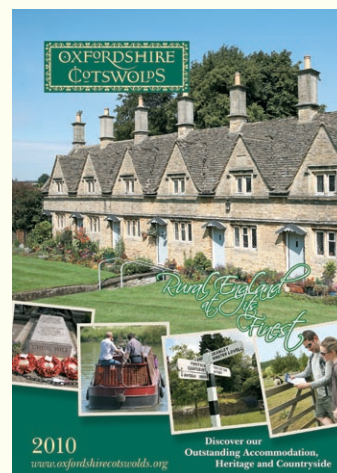


## What does West Oxfordshire District Council do for tourism?

The Council provides the following functions:

- Manages three Visitor Information Centres (Burford, Woodstock and Witney), handling over 120,000 enquiries per year from visitors that come to the area. The Council owns the Visitor Information Centres in Burford and Witney. It also supports a tourist information point in Chipping Norton.
- Co-ordinates marketing activity and campaign work for the Oxfordshire Cotswolds brand.
- Produces marketing material for the area such as the main visitor guide, mini guide and specific area guides where appropriate.
- Coordinates Events (Explore Oxfordshire, Tourism Forum, Sub Groups, West Oxfordshire Week, Partner Open Days).
- Has developed and maintains a Destination Management System (DMS) for the area.
- Promotes a wide range of events through the monthly WOWO publication and online listings.
- Devises and promotes visitor products from self guided walking trails to special events.
- Co-ordinates an annual residents week; West Oxfordshire Week (WOW).
- Promotes and supports the Green Tourism Business Scheme (GTBS) and Visitor Payback Scheme (Step into the Cotswolds).
- Provides much of the infrastructure of tourism's essential services such as visitor information centres, signposting, leisure centres, waste management, public toilets and car parks which ensure that basic visitor needs are catered for.
- Supports the development of the arts and sports, often resulting in events which are of great appeal to visitors as well as residents.
- Cares for parks, open spaces and other public areas.
- Provides support and advice on planning applications which can have an important impact on tourism.
- Recognises the advantages of twinning and links with towns in other countries with regard to the promotion of tourism.
- Gives grants, advice and practical support to arts organisations and events.
- Is the District's licensing authority, issuing licenses to taxi drivers, pubs and entertainment venues.
- Works with partners to ensure that the Oxfordshire Cotswolds are represented at a local, sub-regional, regional, national and international level. Partnerships include; Countywide working, Cotswolds, BBO Committee, TSE, DP:UK, Visit Britain and Visit England.
- Lobby's to influence and support future national tourism initiatives eg P4E, IDeA and LGA.

Even if the District Council did not do some or all of these things, visitors would still come to the area but it is likely they would come in smaller numbers and find the experience a less enjoyable one. The District Council believes it serves local residents and businesses most effectively by managing tourism and visitors to the area.





## Consultation and Research

### How has this strategy been developed?

This strategy has been developed through consultation and research about the local tourism industry.

#### Initial Industry Consultation

In February 2008 at the industry sub group meetings as well as an email to the whole Industry, local tourism business and partners were asked to comment on suggested priorities for Tourism. This received a low response rate.

##### Key Findings Results

All agreed with the suggested 10 priorities, however the order they were ranked was different. Three areas were highlighted by all as particularly important; an emphasis on green and sustainable tourism, an emphasis on quality and an emphasis on making the Oxfordshire Cotswold's a must see Visitor destination, particularly to the overseas markets.

#### Tourism Forum Consultation

November 2008 saw the Annual Tourism Forum take place where over 100 local tourism businesses and organisations attended and an interactive consultation took place with feedback on key issues, proposed priorities and the Council tourism operation.

##### Key Results Findings

In terms of the key findings all priorities were generally agreed upon as being significant. However the most importance was focused on; marketing and making the Oxfordshire Cotswold's a must see visitor destination through local, regional, national and international partnerships and close working with local businesses and organisations. Training and development opportunities and developing green and sustainable tourism initiatives were ranked much lower in levels of importance on the priorities.

Further to this 96% agreed that role of WODC in developing and supporting tourism activity was important and 81% felt they directly benefitted from the work of WODC tourism department.

In terms of the credit crunch and looming recession at this time 47% of businesses said their businesses were being affected with 53% saying there was no significant impact as yet.

#### Visitor Satisfaction Survey

Two annual visitor surveys take place for Tourism; the Visitor Information Centre Customer Satisfaction Questionnaire and the Visitor Guide Questionnaire.

##### Visitor Guide Questionnaire Key Findings

(based on 862 completed questionnaires)

64% of visitors had visited before. 81% said the guide significantly influenced their decision to visit. The most popular activities planned for a stay were; Museums/Places of historical interest, eating out, walking, gardens and shopping. Other activities that received notable interest were; animal attractions, theatres/shows, visiting friends and relatives, exploring family history, cycling, special events, fishing and golf.

75% also said that a businesses commitment to green tourism and sustainable initiatives affected their decision on where to stay and what activities to do whilst visiting the area.

##### Visitor Information Centre Questionnaire Key Findings

(based on 182 questionnaires completed)

Questionnaires were collated from all three Visitor Information Centre's in Witney, Woodstock and Burford and overall 99% of visitors were impressed with the service provided, highlighting the excellent customer



service standards the centres have. However an issue highlighted as an area of dissatisfaction in Witney and Burford was that of signposting and accessibility.

### Brand Research

In 2003 Tourism South East (TSE) conducted some brand research on the Oxfordshire Cotswolds and the results showed that the brand prompted significant interest for Leisure stays in both the domestic and European markets. Since 2003 the Oxfordshire Cotswolds brand has gained further recognition in the European and Long Haul Markets with visits increasing significantly as a result of targeted marketing.

A domestic focus group identified the Oxfordshire Cotswolds as having the following traits;

- A very strong brand
- Universal awareness
- Strong imagery, even amongst younger age group
- Seen to offer peaceful, rural, pretty villages – known to be an area of great beauty
- (For Some) Known to be very overcrowded in high season and on bank holidays.

Further to this in 2009 Tourism South East made the following comments regarding the Oxfordshire Cotswolds Brand;

***Increasingly over the last 10 years brands have become much more than just products. Visitors are looking for the brand experience. This allows a destination to promote certain qualities or characteristics that make it special or unique. This creates value for the destination. Witney and Woodstock are far more than just market towns***

***when promoted as the ‘Oxfordshire Cotswolds’ experience. Tourism South East’s research in 2003 and 2005 led TSE to adopt a marketing strategy which clustered smaller, lesser known destinations around iconic destination brands. Where an effective brand experiences exists, this becomes an invaluable marketing tool. A brand experience provides added value for a destination.***

***In the current economic climate, a brand identity can provide a feeling of security. NVision’s research has shown that brands that match up to their promise can deliver growth during economic uncertainty. Consumers are wary on spending, looking for value for money and recognised brands provide that feeling of ‘certainty’, of the experience matching the expectations. The Cotswolds is particularly strong in the domestic markets and aligning West Oxfordshire as the ‘Oxfordshire Cotswolds’ ensures instant recognition of what the destination experience can offer.***

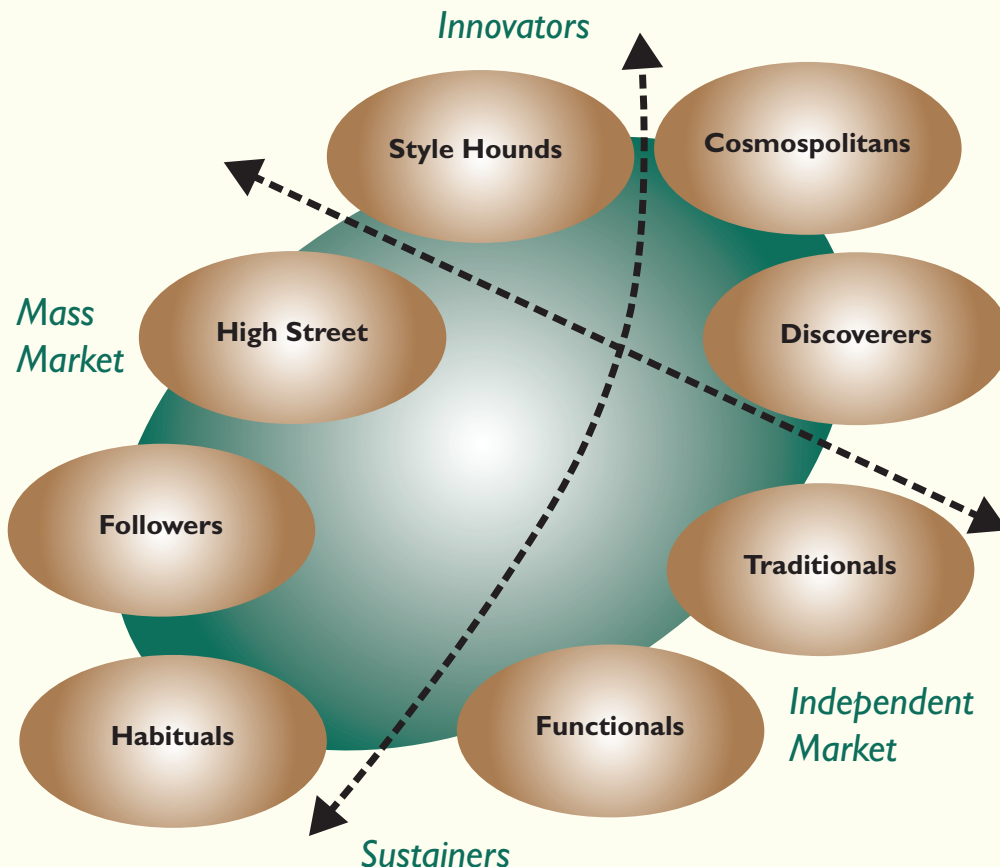
***Over the last year, TSE has seen that rural B&B’s that are linked to destination brands have fared better during the recession than those that do not have such association.***

This clearly highlights the strength in having a destination brand to market the area.



## Ark Leisure Segmentation

The Ark Leisure segmentation model is considered to be more relevant for segmenting leisure and tourism markets because it recognised that values and beliefs shape the visitors need requirements which subsequently influence their visit and purchase behaviour. The **Ark Leisure Segmentation Model** is featured below.



### The Key Characteristics of each Segment are as follows;

#### Habituals

The Habitual segment are most likely to value a more relaxed pace of life. They are strongly traditional, and very resistant to any expenditure.

#### Functionals

Are very resistant to spending and appear pretty self reliant. They are very price driven and value functionality strongly over style.

#### Traditionalists

Segment is a main stream market whose members are relatively self reliant and internally referenced people

with possibly tendencies towards being sustainers. Whilst this group are not swayed by products with style and individuality, they will still go for something out of the ordinary.

#### High Street

Segment are generally externally referenced. They are interested in fashion brands. Style is more important than functionality or individuality. They are an active segment moderately interested in intellectual pursuits, arts and culture.

#### Followers

Are a group that is strongly influenced by others around them. They have a similar aversion to what might be



considered old fashioned as style hounds but much less interest in new and fashionable options.

### Style Hounds

Are very fashion conscious, and keen not to be seen as old fashioned. They like to be part of the latest trends and therefore quite strongly influenced by others, though they have the spending power to do what they want.

### Discoverers

As the name suggests are independent of mind. They are the group least likely to be worried about what others might think. They are little influenced by style or brand unless it represents values they are seeking. Function far out rates style as a purchase driver.

### Cosmopolitans

Are strong, active confident individuals, who do what they want rather than following any particular fashion. Cosmopolitans view themselves as stylish, but individuality rather than fashion is most important they are quite happy to adopt traditional values when they feel they are appropriate. They are comfortable to try things that are out of the ordinary.

Using the Ark Leisure segmentation model TSE identified the key segments for tourism activity in Oxfordshire as follows:

- Eating and drinking in country pubs – Style Hounds, Followers.
- Visiting rural towns or villages – Followers, High Street, Style Hounds.
- Visiting markets/farmers markets – High Street, Cosmopolitans, Habituals.
- Driving and sightseeing – High Street, Followers, Cosmopolitans.
- Visiting countryside for relaxation/picnics – High Street, Functionals, Habituals.

These segments help the Council to focus its marketing activity and enables the development of themed breaks and the packaging together of activities to develop itineraries that will be attractive to key markets.

## Economic Impact Results

Economic Impact Studies can be produced on an annual basis to show the value of tourism to an area and associated trends in expenditure and visitor numbers. The Council has been commissioning these annually to monitor tourism trends across the district. The most recent results are for 2007 and the key findings have been summarized below to show the value and volume of tourism to the District and associated economic impact and employment.

- Overall, an estimated 471,000 staying trips were spent in West Oxfordshire, of which around 433,000 were made by domestic visitors (92%) and 38,000 by overseas visitors (8%).
- Staying trips result in an estimated 1.39 million bed nights in the District. Domestic visitors account for 77% of these nights and overseas visitors accounted for 23%.
- Approximately 3.2 million tourism day trips were made to the District (lasting more than 3 hours and taken on an irregular basis).
- 54% percent of all staying or overnight trips to the District were accommodated in commercial serviced accommodation. 13% of trips involved staying in non-serviced accommodation such as self-catering accommodation and caravan/camping and hostel accommodation.
- Around a third of all staying trips were accommodated in the homes of friends and relatives.
- Holiday trips were the main reason for trips for domestic visitors, accounting for 77% of all domestic staying trips. For overseas staying visitors, the dominant trip type was visiting friends and relatives (VFR) at 61%.
- Tourism day visits accounted for 87% of trips, and 56% of expenditure. Despite only accounting for 12% of trips, domestic staying trips accounted for 37% of spend. Similarly, overseas staying trips were deemed to account for only 1% of total trips but 7% of total spend.



- Additional expenditure by visitors on second homes and on goods and services by visitors of friends and relatives staying with them generated a further total £9,921,000.
- The value of visitor expenditure to the district translated into nearly £225 million worth of income for local businesses through direct, indirect and induced effects.
- Overall the model estimates that tourism activity in the District supports nearly 3000 FTE jobs and nearly 4000 actual jobs in West Oxfordshire.

### SWOT Analysis

Inclusive of all the previous research a consultation then took place with the industry at the sub group meetings in March 2009 which included representatives from the following sectors; attractions, events, hotels, conferencing, local interest groups, bed and breakfast, self-catering and camping and caravanning. The groups pulled together a SWOT analysis of the strengths, weaknesses, opportunities and threats.

From these workshops the industry identified the following strengths for the area;

- Strong Brand Identity in the Oxfordshire Cotswolds.
- Economic Importance of Tourism to West Oxfordshire.
- Dedicated tourism team to promote and develop the offering.
- High percentage of quality assured accommodation across the district.
- Three Visitor Information Centres.
- Wide range of attractions and local events.
- Strong DMS and Website.
- Strong partnership working with the local industry.
- Positive local attitude towards tourism.

The industry then identified the following areas as opportunities and challenges to explore further and build on the current success;

- Promotion as an all year round destination.
- The new Marriott's Close development in Witney.
- Joint approach to significant campaign work to add value.
- Olympics 2012.
- Increased use of the Internet.
- Potential to work with a wider range of local businesses.
- The economic recession.
- Increasing competition.

### Conclusions

Having analysed the importance of tourism and the role of Local Government, it is clear that this is a significant sector not only nationally, but very specifically to West Oxfordshire. Further to this through consultation with a range of stakeholders including tourism businesses and organisations and consumer feedback it has enabled us to get a clear picture of where tourism is now and the key priorities for the future development of this sector.

The Council is seen as having an important role to play in promoting and developing the tourism offering and supporting the associated businesses and infrastructure. The Council has a strong brand in the Oxfordshire Cotswolds that is recognised by both domestic and international visitors. The district has a wealth of attractions and experiences to offer the visitor which is particularly important for the repeat visitor and the longer stay visitor.

Through research the Council has identified key priority areas for tourism all that aspire to achieve making the Oxfordshire Cotswolds a must see visitor destination that continues to generate significant income levels to the local economy and support employment.







## Vision, Priorities and Actions

### What is the overall aim for tourism?

From this consultation it has been possible to come up with an overall vision for tourism in West Oxfordshire. The overall aim of the Tourism Strategy is to develop partnerships in order to maintain and increase the contribution that tourism can make to the District's economy and the 'quality of life' in the area without endangering the environment. The aim of this strategy is summed up as follows:

***“To develop and promote the Oxfordshire Cotswolds as a must see visitor destination and further develop sustainable tourism in West Oxfordshire to enhance the quality of life for local people whilst encouraging visitors to come to the area, spend more, stay longer and return”.***

### What are the Key Targets?

The main target for tourism will be;

***“To increase the value of Tourism to local economy of West Oxfordshire”.***

More specifically and in line with the Council Key Performance Indicator to be in the top 25% of Councils in the DP:UK Rural South for economic value of tourism to the area.

However beneath this there are three main focus areas that will help to achieve this;

- **Value over Volume** – Encourage visitors to stay longer, spend more and return.
- **Marketing** – Attract visitors to the Oxfordshire Cotswolds using a varied marketing mix.
- **Sustainability** – Protect and enhance the local environment.

### How can we make sure we are inclusive?

The aim of the strategy is to be proactive in ensuring that the District welcomes visitors from a diverse range of backgrounds and with a wide range of needs. In order to do this the Council will:

- Engage with local businesses including accommodation providers and attractions to support them in achieving DDA compliance and catering for visitors with a range of particular needs and aspirations.
- Ensure that marketing materials are available in a range of formats and languages, fully utilising language translation services, and ensure that the Oxfordshire Cotswold's web-site is 3A compliant.
- Ensure that our marketing materials, including the Oxfordshire Cotswold Visitor Guide, carry clear access information on both accommodation and attractions.
- Ensure that our Visitor Information Centres are accessible, including consulting with a range of stakeholders and equality groups and continuing to respond to particular needs including, for example, the installation of hearing loops.
- Continue to review equalities and remain committed to developing actions in response to consultation and customer feedback.



## Key Priority Areas

The feedback from the consultation and research carried out for this plan has led to the development of 8 key priorities and related actions for tourism in West Oxfordshire:

### Priority 1 (P1) – Co-ordination of Tourism Partners

**Co-ordination of Tourism Partners** – to ensure that tourism provision and tourism developments are co-ordinated across the industry.

#### P1 Actions:

Action No.	Action
1	Coordinate the Tourism Forum and sub group meetings for West Oxfordshire with other tourism partners from the public, private and voluntary sectors.
2	Continued membership and involvement in related and relevant groups, e.g. Tourism South East, DP:UK, Partners for England.
3	Work with different services across West Oxfordshire District Council where their strategies and plans have an impact on tourism e.g. public realm activity, Local Development Framework (LDF), Sustainable Community Strategy (SCS), night-time economy.
4	Work with other Local Authorities where there is added value in a joint approach.
5	Work with private sector partners where there is added value in a joint approach.

### Priority 2 (P2) – Marketing of the Oxfordshire Cotswolds Brand

**Marketing of the Oxfordshire Cotswolds Brand** – to encourage growth in visitor numbers and spend per visitor to the area, through a more co-ordinated approach to marketing the Oxfordshire Cotswolds to include both domestic and overseas marketing.

#### P2 Actions:

Action No.	Action
1	Position the Oxfordshire Cotswolds brand as a must see Visitor Destination by identifying and utilising opportunities within regional, national and international media e.g. travel supplements/articles within local and national newspapers and radio.
2	Review existing promotional literature and distribution channels to enable effective targeting of appropriate market segments. Use visitor profiles to further develop the range of themed breaks and packaged itineraries e.g. walking/cycling breaks, heritage/historical packages etc (linking to web-site).
3	Further develop <a href="http://www.oxfordshirecotswolds.org">www.oxfordshirecotswolds.org</a> in order to generate interest in the Oxfordshire Cotswolds as a destination, drive up accommodation bookings and online sales and establish customer relationship management (CRM) programmes. This will be measured by web traffic statistics including number of unique visitors, hits, country of origin and specific page interest.



*P2 Actions (continued):*

Action No.	Action
4	Further develop e-marketing opportunities eg search engine optimisation, targeted trade and consumer e-marketing, e-newsletters and utilising opportunities with partner websites such as Visit Britain.
5	Promote the wide range of attractions, activities and events the District has on offer through attendance at Travel Industry Trade and Consumer Exhibitions, our promotional material (eg Visitor Guide) and on the website.
6	Have a focused targeted approach to domestic and overseas marketing using the ARK segmentation model for domestic markets and Visit Britain country profiles and tend data for the overseas markets.
7	Nurture the local community’s appreciation of the importance of tourism to the District e.g. through the West Oxfordshire Week.

**Priority 3 (P3) - Information Provision**

**Information Provision** – to provide a quality information service to visitors, residents and businesses.

*P3 Actions:*

Action No.	Action
1	Review the operation, presentation and location of the District’s Visitor Information Centres and explore options for enhancing the service including an investigation of potential external funding streams.
2	Promote the services of the Information Centres and the Tourism Service at West Oxfordshire District Council.
3	Ensure informative and promotional literature is distributed throughout the District e.g. Bedroom Browser is distributed into bedroom accommodation across the whole of the district.
4	Investigate the opportunities offered by new technology to enhance the visitor experience and visitor information available, including further development of the DMS and Website and engaging in national initiatives eg the use of mobile phone technology and touch screens.



### Priority 4 (P4) – Quality

**Quality** – to maintain and improve the quality of the District’s tourism product to meet rising visitor expectations.

#### *P4 Actions;*

Action No.	Action
1	Endorse the quality accreditation schemes and increase the number of accommodation providers in the district to participating in the nationally recognised grading schemes – Quality in Tourism (QIT) and the AA.
2	Encourage attractions to sign up to the national code of conduct for visitor attractions – VAQAS (Visitor Attraction Quality Assurance Scheme).
3	Ensure the destination is perceived to have a quality environment through public realm activity including working with street scene and Town and Parish Councils and County Council to maintain the quality of footpaths, toilets, waste and signage.
4	Promote and encourage the ‘Welcome’ courses to ensure quality customer service across the District.

### Priority 5 (P5) - Environment

**Environment** – to support and encourage sustainable tourism activities.

#### *P5 Actions:*

Action No.	Action
1	Encourage tourism operators and visitors to adopt more eco-friendly practices such as energy conservation, recycling, use of local producers/suppliers.
2	Continue to endorse the Green Tourism Business Scheme and Visitor Payback schemes.
3	Support local sustainable tourism initiatives eg local food initiatives.
4	Encourage effective tourism signage as an aid to visitor management.
5	Encourage the improvement and usage of public transport to and within the District.



**Priority 6 (P6) - Employment, Training and Business Support**

**Employment, Training and Business Support** – to encourage employment and training opportunities in the tourism and hospitality related industries.

*P6 Actions:*

Action No.	Action
1	Promote the business support services available for the industry through industry sub group meetings, Annual Tourism Forum, industry section of website and regular industry newsletter.
2	Support business and employees to improve their skills in marketing, IT and customer care in partnership with Tourism South East.
3	Facilitate training opportunities for the tourism sector businesses which address statutory and regulatory matters e.g. DDA, Fire Regulations and Licensing.

**Priority 7 (P7) - Research**

**Research** – to encourage effective market research to help develop tourism in the District including developing a programme of on-going consultation.

*P7 Actions:*

Action No.	Action
1	Improve understanding of the industry by participation in a regular programme of research and ensure new projects are based on and evaluated against sound information.
2	Commission Economic Impact data on the District.
3	Research areas of best practice and new initiatives amongst other local authorities and assess their appropriateness for West Oxfordshire including Oxfordshire, Gloucestershire and Warwickshire Authorities and other similar authorities within DP:UK.
4	Research new areas for development in collaboration with Planning Services e.g. LDF and planning application consultation.



## Priority 8 (P8) – Future Opportunities

Future Opportunities – to develop the benefits arising from the opportunities associated with the long-term growth of tourism to contribute to the future prosperity of the District.

### P8 Actions:

Action No.	Action
1	Seek to capitalise on the potential generated by the 2012 Olympics where appropriate including identifying potential funding streams to support promotional activity, working with media where possible and collaborating with Tourism South East on their 'On Your Marks, Get Set, Go!' Olympics 2012 Strategy.
2	During the economic recession raise the profile of the area as a domestic tourism product through regional and national media and exhibition attendance.
3	Investigate, encourage and exploit future tourism opportunities for the existing overseas markets including USA, Canada, Japan, Australia, France, Germany and Italy and the emerging markets such as China, the Netherlands and Russia.
4	Review key markets, trends and market segments, focusing on the both the leisure and business sectors as appropriate using the ARK visitor profiles to inform campaign work and further develop thematic packages.

## Delivery of Priorities and Actions

Each of the key priorities together with the proposed action areas will be embedded in the Council Leisure and Tourism Service Plan. However, as the strategy covers a three year period it is almost impossible to predict the many opportunities, threats and changing environmental issues which will arise and there is the need therefore to allow flexibility to adopt new actions as appropriate.

The actions which are currently included are largely those that can be directly influenced or achieved by the Tourism Service within the Council, although it is hoped that tourism providers and other bodies will contribute to the delivery of the strategy through their own business planning processes.

The development of tourism for West Oxfordshire cannot be achieved by the Council alone as many other organisations are involved and partnership working is essential.

Whilst the strategy is for a three year period it will be reviewed annually to incorporate external and internal environmental changes and industry changes. An Annual Report on the Tourism Strategy will be produced highlighting what the actions, tasks and outcomes have been achieved under each priority area for that year.





## Glossary of Terms

### BBO

**Buckinghamshire, Berkshire and Oxfordshire** – a Sub Regional area of Tourism South East.

### DMF

**Destination Managers Forum** – a collective group of all the local authority members across the South East operated by Tourism South East

### DMS

**Destination Management System** – Destination Management Systems are systems that consolidate and distribute a comprehensive range of tourism products through a variety of channels and platforms, generally catering for a specific region, and supporting the activities of a destination management organisation within that region. DMS attempt to utilise a customer centric approach in order to manage and market the destination as a holistic entity, typically providing strong destination related information, real-time reservations, destination management tools and paying particular attention to supporting small and independent tourism suppliers. A DMS is far more than just a website or online booking system. It provides a complete set of tourism management, promotion and fulfilment tools with product, business and visitor databases as its foundation.

### DP:UK

**Destination Performance UK** – the membership organisation for local authority tourism services committed to the principles of performance management and best practice

### GDP

**Gross Domestic Product** – a basic measure of a country's economic performance

### IDeA

**Improvement and Development Agency for Local Government** – the IDeA works with councils to support partnerships and develop good practice.

### LGA

**Local Government Association** – a voluntary lobbying organisation, acting as the voice of the local government sector, and an authoritative and effective advocate on its behalf.

### P4E

**Partners for England** – collaborative initiative owned by public and private stakeholders with an interest in the prosperity of England's visitor economy.

### QAS

**Quality Assurance Scheme** – refers to participation schemes for the tourism and hospitality sector, particularly for accommodation and attractions.

### SEEDA

**South East England Development Agency** – the Regional Development Agency for the South East responsible for the sustainable economic development and regeneration of the South East of England

### TSE

**Tourism South East** – the Regional Tourist Board that promotes the South East of England.

### VIC

**Visitor Information Centre** – centre offering range of information and services for visitors.





WEST OXFORDSHIRE  
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