OXFORDSHIRE VISITOR ECONOMY VISION & DESTINATION MANAGEMENT PLAN 2023-2028

REPORT FOR THE DMP STEERING GROUP/OXLEP

SEPTEMBER 2023

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1 ABOUT THIS PLAN

This is the Visitor Economy Vision and Destination Management Plan (DMP) for Oxfordshire.

This five year Vision and DMP is a shared commitment to develop, manage and market Oxfordshire in a way which brings benefits to business, local communities, visitors and the environment. It has been commissioned by OxLEP through the Visitor Economy Renaissance Programme which was established to respond to the challenges of Covid-19, but this is a DMP for the whole of Oxfordshire and all those who collectively support and work within it.

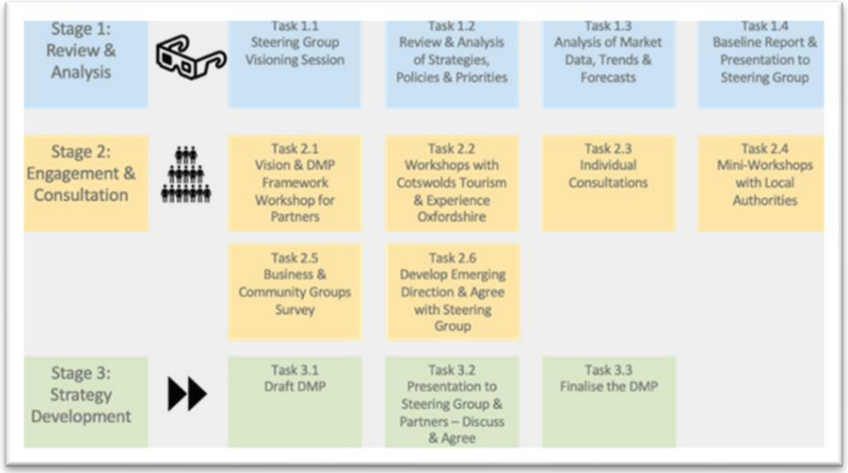

Figure 1 DMP Development Process

The DMP is built on a detailed market and trend analysis, consideration of the strategic local, regional and national priorities, and extensive engagement. It is not everything that will happen, instead it is focussed on the actions and approaches that will have the greatest impact.

This is an important moment for Oxfordshire in deciding where it wants to take its visitor economy. The sector is still recovering from the impacts of Covid-19, economic challenges are impacting both business and visitors and tensions between visitors and communities in high-demand areas contrast with other locations that feel they are missing out and could welcome more visitors and the benefits they bring. The climate crisis and impacts on the environment are critical issues that the tourism sector must help address.

The De Bois review, commissioned by Government and published in 2021, highlighted the challenge of a highly fragmented DMO landscape across England. As a result, a new tiered structure of DMPs was proposed with a pilot structure in NE England and VisitEngland rolling out a national network of second tier Destination Management Organisations (DMOs) called Local Visitor Economy Partnerships (LVEPs) to which Experience Oxfordshire and Cotswolds Plus are accredited.

While Oxfordshire has two LVEPs within the county boundary, only Experience Oxfordshire covers the entire county area with Cotswolds Plus covering a large section of the west of the county. Both therefore are important partners in the delivery of this DMP. However, it is expected that ***Experience Oxfordshire will lead on the majority of the priorities for Oxfordshire in which both LVEPs have a role to play*** and collaboration, particularly in areas of geographic overlap, will be critical to the successful delivery of this DMP.

The DMP will also assist National Government priorities for tourism outlined in the national Tourism Recovery Plan; to be the most accessible and inclusive destination in Europe, improve sustainability, and grow Business Events, all whilst maximizing benefits for Oxfordshire.

Though boundaries are important to local stakeholders, they mean very little to visitors. Where brands and thematic experiences cross from Oxfordshire into neighbouring areas (e.g. Chilterns, Thames, Cotswolds, motoring heritage), it is entirely reasonable to expect that activity such as marketing will also work across county boundaries and with partners and stakeholders outside Oxfordshire.

The DMP is for all stakeholders with an interest in tourism in Oxfordshire. It will only succeed with a renewed commitment to work together to tackle the issues and opportunities that exist across the county. Tourism is a very broad sector so it justifies having this dedicated plan – but it also operates in a wider economic and social context. Labour market, net zero or transport issues for example will share similarities with other sectors of the economy. So this plan has been developed alongside the new Strategic Economic Plan for Oxfordshire and it aligns to the approaches articulated in that plan. This DMP will need direct investment in time and resources but can also be used to positively influence investment elsewhere for the benefit of the visitor economy. It is a 'live' document which should be periodically reviewed and updated to take account of the changing context.

2 SHARED VISION & OBJECTIVES

The aim of this Destination Management Plan is to achieve sustainable growth through encouraging longer stays, year-round and generating more value from visitors coming to Oxfordshire.

Over the five year lifetime of the DMP, the county will see an increase in how long people stay in the area and how much they spend. This will be achieved by taking a market-focused approach: with improved destination management, development and marketing of the area's tourism, and with decisions made through the lens of the target markets.

Oxfordshire - its places, spaces and residents - will provide a great welcome to visitors from across the world, developing its reputation as a destination that delivers high quality experiences year-round and is worthy of spending more time in, exploring more of, and returning to. It will be known as a responsible destination which is celebrated for including visitors in the innovative yet practical actions it is taking against climate change.

This will only happen through stronger partnership working, better collaboration between the county's many stakeholders and innovation, led by its Local Visitor Economy Partnerships (LVEPs) with the involvement of all the key players. And a recognition, through suitable investment of resources, that tourism is a significant part of the wider economy which is ultimately for the benefit of Oxfordshire's local communities and must enhance their quality of life.

Success will result in profitable businesses and provide quality jobs in which staff are valued, trained, retained and rewarded with fair wages. It will support local infrastructure and cultural and leisure facilities. It will enhance the county's credentials as a place to live, to invest, to do business and to study.

TARGETS

Given the objective to drive sustainable growth through improved visitor value, the focus when setting targets will be about economic impact measured by visitor spend, which will lead to increased prosperity, profitable businesses and ensure quality jobs across Oxfordshire. Increased economic impact will come from generating more value from visitors – by encouraging people to experience more of the county across the year and stay longer. The focus on economic impact, rather than footfall, is also central to the ambition of driving sustainable tourism given the emphasis on longer visits which create more opportunities to spend while minimising carbon impacts from visitor travel. The Future Oxfordshire Partnership's vision for sustainable development highlights the importance of ensuring that economic outcomes are matched by ones which improve environmental and social wellbeing.

The targets outlined here provide a means of monitoring progress and evaluating proposed investments and interventions designed to develop the visitor economy by changing visitor behaviours and perceptions. By 2028 the Oxfordshire visitor economy will deliver:

- Greater Economic Benefit – The annual economic impact of tourism to grow by £250m to £3.2bn against 2019 levels[1]
- High Value Visitors – The proportion of staying visits to rise from 9% to 12% of the total[2]
- Improved Sentiment – Perceptions of Oxfordshire and propensity to visit to increase significantly among key visitor segments as well as support for tourism among local communities[3]

In addition to the above, this is also an ideal time to establish baseline measures around destination sustainability against which future targets can be set. Carbon calculations of the impact from visitors and the proportion of local sourcing by visitor economy businesses are the kinds of measures which would inform carbon reduction plans. Monitoring progress, alongside other measures such as clean air or water quality, will highlight the contribution that is being made by the tourism sector.

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[1] All monetary values are 2023 prices. Baseline is 2019 Cambridge economic model data inflated to 2023 using Bank of England calculator

[2] Staying visits as a proportion of total trips taken in Oxfordshire. Baseline is 2019 Cambridge economic model data

[3] Commission survey research to establish a baseline around visitor sentiment and track progress over time

3 OXFORDSHIRE NOW

Oxfordshire is an important international visitor destination with the potential to achieve much more for its communities.

A detailed baseline and technical report accompanies this DMP and contains all of the background information relating to the visitor offer, policies, tourism data, engagement findings, market data, trends and forecasts, and marketing analysis. A summary of the most relevant findings is highlighted below.

OXFORDSHIRE OFFER

Oxfordshire has an impressive visitor offer and a reputation that reaches globally. The City and University, The Cotswolds, Blenheim Palace, Bicester Village, The Thames & Chilterns have iconic status in the minds of many overseas and domestic visitors. There is a breadth to the offer that is enviable – towns, villages and a city with strong heritage, quintessential English countryside, historic waterways, family attractions, museums, culture, arts and events, outdoor and active experiences including a number of national trails, plenty of independent hospitality, food, drink and retail experiences alongside international brands. Visitors have a familiarity with the destination given the frequency it features on film and television.

While Oxford has a good supply of visitor accommodation, performance suggests there is the potential to increase the supply of accommodation especially if the destination is to get more value from the visitors that it attracts. While some data pre-dates Covid, it still provides a reasonable snapshot and shows that Oxfordshire has:

- 1,000 visitor accommodation providers with around 36,000 bedspaces (Source: VisitEngland 2016)
- 3,000 active rentals via short term rental websites of which around 42% are available full-time (Source: AirDNA)
- Seasonal peaks in accommodation occupancy of just under 90% across June-August and lows of around 60% during January and that it had recovered to within 2 percentage points of pre-Covid performance by 2022 (Source: STR)

Oxfordshire's business visits and events offer is predominantly supplied through the county's larger hotels, Oxford University's colleges and larger capacity venues that include the King's Centre, Kassam Stadium, Oxford Town Hall, Sheldonian Theatre and New Theatre. Much of this is driven by academic associations as well as non-discretionary business tourism.

The visitor offer continues to change and significant pipeline projects in the county include:

- Great Wolf Lodge, a £200m family-orientated indoor waterpark resort near Bicester
- Oxford United FCs plans for a new stadium between Oxford and Kidlington
- Stephen A. Schwarzman Centre for the Humanities, a £175m state of the art academic, exhibition and performance venue
- Mullin Automotive Experience at Enstone
- Bicester Motion masterplan and plans for Experience, Innovation, and Wilderness Quarters and a 360 bed hotel at the former air force base in Bicester
- Various town centre and market development plans including Banbury Vision 2050 and Oxford Covered Market regeneration
- Accommodation development proposals including The Store Hotel, Oxford (former Boswells department store) and Estelle Manor (Eynsham Park)
- Wilder Spaces Oxford, a potential £40m visitor attraction featuring wildlife-friendly show gardens

POLICY CONTEXT

The baseline contains a wide range of relevant policies and strategies that impact this DMP. National strategies, including the Government's [Tourism Recovery Plan](), are largely concerned with recovery from Covid (a return to pre-Covid levels of tourism by 2024), better dispersal of tourism across the country, higher productivity, improved sustainability, accessibility and inclusion. County-wide and local authority strategies within Oxfordshire highlight policy areas that are more closely attuned to local circumstances and local need. These mostly fall under a heading of building a more 'Sustainable Future' for the county in which a better balance is struck between the economic contribution of tourism and its impact. Key policy areas that emerge strongly and which have relevance to the DMP include:

- Addressing climate change, preserving and protecting nature and green space
- Strengthening Oxfordshire's global reputation and creating an innovative and pioneering economy
- Infrastructure to support development including better connectivity, integrated and sustainable transport
- Tackling inequalities and building fairer, healthier and stronger communities, addressing the impact of short-term lettings on local housing
- Skills and pathways for the tourism workforce including young people
- Ambitions to spread the benefits of tourism across the county and across the year
- Getting the basics right, creating stronger towns, developing accommodation, improving welcome, ensuring high quality countryside, quality public realm and improving street scene

The DMP will be delivered in conjunction with other strategies and plans in place, and in development' which include: Pathways to Net Zero Carbon Oxfordshire (PAZCO); Oxfordshire Infrastructure Strategy (OXIS); Oxfordshire's Local Transport and Connectivity Plan (LTP5); Oxfordshire Energy Strategy; Oxfordshire Local Skills Improvement Plan (LSIP); and the suite of district-level Local Plans that exist across Oxfordshire.

VALUE OF TOURISM

Tourism is an important sector in Oxfordshire's economy. Worth around £2.5bn (at 2019 prices) and employing around 42,000 people it brings many economic benefits. But when you look a bit deeper you find that some visitors are more beneficial than others. According to the Economic Impact Assessment, and backed up by the national data sources, it is apparent that staying visitors bring the greatest benefits and, of these, overseas staying visitors are even more valuable. Staying visitors account for 12% of visits and 48% of spend while day visitors account for 88% of visits and 52% of spend. When you look at overseas visitors they account for 4% of visits and 29% of spend, highlighting their importance to Oxfordshire. The DMP will succeed if it can grow the impact without adding to concerns of over-tourism and a drive to grow staying visits could help achieve this.

When comparisons are drawn between Oxfordshire and other English destinations it is clear that the county performs well in the league table of international tourism visits (7th for holiday , 10th for 'visiting friends & relatives' or VFR, 8th for business and 2nd for study) while among domestic tourist visits it is at best mid-table (32nd for holiday, 15th for VFR and 21st for business). This not only indicates the importance of overseas visitors, which as we have seen bring the greatest benefits, but also where there is room for improvement in relation to domestic staying visitors.

Covid-19 and the resulting restrictions on visitor movement and on business had a dramatic effect on tourism in Oxfordshire. The 2021 Economic Impact Study for the county, commissioned by Experience Oxfordshire, showed a reduction in the value of tourism from £2.47bn to £1.01bn between 2019 and 2020. This had recovered to £1.58bn in 2021 and anecdotally recovered further in 2022 with hotel occupancy recovering to within 2 percentage points of the 79% average occupancy that had been the norm until the pandemic. VisitBritain are forecasting (July 2023) that inbound visits will reach 37.5m in 2023 which is approximately 92% of the 2019 level. Employment dropped significantly over this period going from a peak of 42,144 in 2019 to 25,524 in 2020 and building further to 28,830 in 2021 according to economic impact studies.

SWOT & ENGAGEMENT

There has been extensive engagement as part of the development of this DMP with a series of workshops with stakeholders, the DMOs, the local authorities and the DMP steering group as well as individual consultations and a business and community survey. The views expressed have been remarkably consistent and are summarised alongside conclusions from the analysis of the data and evidence in the following SWOT table.

STRENGTHS	WEAKNESSES
▶ Internationally recognisable brands in Oxford and the Cotswolds with strong experiences and good destination marketing	▶ 'Final Mile', rural sustainable transport and coach travel issues
▶ Strong secondary brands in the Chilterns and Thames	▶ 'Hot Spots' leading to tensions between visitors and residents
▶ Robust visitor numbers and 42,000 jobs in tourism (2019)	▶ 'Not Spots' missing out e.g. market towns especially at night
▶ Proximity to London and large source markets (domestic and international)	▶ AirBnB concerns and impact on housing
▶ High in league table for inbound (international) visitors	▶ Limited investment currently in destination management
▶ High quality marketing activity	▶ Visitor welcome far from world-class
▶ Ageing UK demographics with high disposable income	▶ Labour market pressures and workforce skills
▶ Policy support for tourism development	▶ Collaboration and partnership not hardwired – too much activity driven by administrative boundaries than visitor brands
▶ Strong thematic experiences (Heritage, History, Culture, Gardens, Countryside, Landscape and Waterways)	▶ 'Oxfordshire' brand means little to visitors
▶ Strong demand for visitor accommodation	▶ Visitors seen as an inconvenience – 'too many not spending enough'
▶ Visitor economy underpins wider inward investment to the county by helping make it a great place to live, work, study and invest	▶ Middle to bottom of league table for domestic holidays and business visits
	▶ Inconsistent quality within the countryside and rural spaces
	▶ Visitor satisfaction levels lower in some areas (transport and retail)

OPPORTUNITIES	THREATS
▶ Packaging experiences and itineraries to join up the offer ▶ Visitor dispersal (across the year/destination) including city neighbourhoods ▶ Business tourism potential ▶ Oxford University more directly involved in the visitor experience ▶ Pipeline projects strengthening the offer ▶ Reputation as a sustainable, accessible and inclusive destination ▶ Making more of the market towns, local food & drink, and waterways ▶ Increased accommodation provision (12% visits = 48% spend) ▶ Collaborative LVEPs bringing the industry together with partners ▶ Arts, culture and events strategic planning ▶ Making more of the National Landscapes and National Trails ▶ Slow Travel – spend longer, explore more, travel sustainably ▶ Improved visitor data and insights ▶ Signature events to influence visits (esp. off-peak) ▶ New funding sources e.g. Accommodation Business Improvement District (ABID), Visitor Levy etc	▶ Unable to identify investment to support better visitor management ▶ Lack of focus – trying to do too much ▶ 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 economic growth ▶ Businesses not engaging with travel trade ▶ Workforce development and labour supply ▶ Residents lack understanding about the value that visitors bring

4 MARKETS

To support the vision, market development for Oxfordshire is not about reaching new audiences, rather it is about maintaining a spread across the domestic and international markets it currently attracts, improving the value of their visits.

Initially, this will come through a better understanding of visitors' motivations to travel and developing new ways of linking up and communicating the experiences on offer to encourage longer stays during which people do more. In time, a sustained focus on improving the quality of a visit and nurturing deeper and more meaningful connections with visitors, will foster loyalty and lead to an increase in repeat visits.

There are six key leisure market segments on which Oxfordshire should maintain focus – three domestic and three international – dialling propositions up and down in marketing activity according to motivations and behaviours. These segments which are mapped out in the table below, have been identified because of their likelihood to deliver value via longer overnight stays and engagement with a range of activities across the county. They have been selected following an analysis of current visitors to the county and drawing on research by VisitEngland and other national tourist boards.

Key Market Trends (source: Blue Sail)

- Changing behaviours in a changing climate – *seeking out responsible destinations*
- Activity, health & well-being – *fresh adventures in the fresh air*
- Bleisure – *blurring boundaries between work time and leisure time*
- The certainty of uncertainty – *flexibility is key*
- All about value – *getting the biggest bang for your buck*
- Going digital – *digitalisation to enhance the experience*

Domestic Segments

MARKET SEGMENT	WHO THEY ARE & WHAT THEY DO	RATIONALE	WHERE'S THE OPPORTUNITY?
 **Country-Loving Traditionalists**	▶ Couples aged 50+ travelling without children ▶ Mid-affluence, skew towards living in South East England ▶ Countryside break takers ▶ Enjoy heritage, outdoors & experiencing local culture – including food & drink	▶ Propensity to spend if the quality is right ▶ Likely to do a lot particularly in more rural areas of the county ▶ Will visit outside of peak times	▶ Use of established rural Oxfordshire brands – Cotswolds, Chilterns – and cross-border brands such as Shakespeare's England to attract them and then encourage further exploration of lesser-known market towns and villages within Oxfordshire through showcasing quality experiences to spur repeat visits.
 **Young Actives**	▶ Younger (pre-family) couples and groups of friends ▶ Enjoy spending time outdoors ▶ Looking to escape the everyday and do something different ▶ Capture and share moments on social media ▶ Long days of activity need to be rewarded by good night-time experiences	▶ Frequent trip takers and will pack a lot in ▶ Will spend on unique experiences including unusual accommodation ▶ Advocates for destinations they love ▶ Consciously support independent businesses	▶ Encourage deeper exploration by showcasing independent businesses doing innovative things ▶ Evening activity development to encourage night-time spend ▶ Showcase the county's long distance walking paths and inclusion in National Trails as well as profiling its range of National Landscapes.
 **Aspirational Family Fun**	▶ Families with school-aged children ▶ Affluent, skew towards living in London & SE ▶ City break takers – but also looking for rural locations with outdoors activities ▶ Enjoy family-friendly activities – especially entertainment, culture & events	▶ Will convert from day to overnight/s ▶ Propensity to spend on activities that keep the children happy ▶ Building loyalty with the destination from a young age ▶ Want to make sustainable choices	▶ Entice out of the city by showcasing range of outdoor-based activities, public and active travel options and family-entertainment options, particularly those in West Oxfordshire ▶ Events development as a means of encouraging repeat visits

International Segments

MARKET SEGMENT	WHO THEY ARE & WHAT THEY DO	RATIONALE	WHERE'S THE OPPORTUNITY?
 **Explorers**	▶ Typically 45+ travelling without children ▶ Mid-affluence; overseas trips a priority ▶ Like a relaxed pace in small cities/countryside ▶ Enjoy heritage, outdoors & experiencing local culture – including food & drink	▶ Largest segment in Germany & Netherlands, and significant in France, Canada, Australia & USA ▶ Will spend ▶ City + rural ▶ Active travel	▶ Use of internationally recognisable brands in Oxfordshire (e.g. Oxford, Cotswolds) and cross border (ego Stratford-upon-Avon & Shakespeare) to attract them and then to encourage further exploration of the county, showcasing quality experiences to spur repeat visits
 **Experience Seekers**	▶ Under 35s travelling without children ▶ Travel frequently, will spend on shopping and experiences while travelling ▶ Looking for cities & rural locations that offer 'only here' experiences (e.g. active outdoors, events) ▶ Choose quality accommodation and food & drink ▶ Looking for good digital connectivity and public transport connections	▶ Largest segment in USA, Canada, Australia & France ▶ City + rural ▶ Will travel by public transport ▶ Bicester Village appeals	▶ Enticing them out of their likely arrival point (the city) through showcasing some of the county's authentic experiences, quirky places to stay and local food and drink. ▶ Events development
 **Culture-Buffs**	▶ Under 40, travelling in social groups (no kids) ▶ Predominantly from China & GCC ▶ Image & brand-conscious – travel is a status symbol ▶ Looking for cities with 'kudos' and 'iconic' experiences to gain social media status	▶ Significant spend ▶ Oxford and Bicester Village appeal	▶ In the longer term, convincing them (via travel trade) that Oxford, with its broad proposition and travel connections, can be the UK travel hub over London and extending stays from day/half day (London+) visits to multiple overnights.

Business Tourism

As highlighted in a study by Oxford Brookes Business School in 2019, domestic and international business tourism is also a significant opportunity for Oxfordshire given its international profile in education, technology and science. As well as individuals and corporate meetings and conferences, larger associations present an opportunity given the Universities and academic links to research, science and industry.

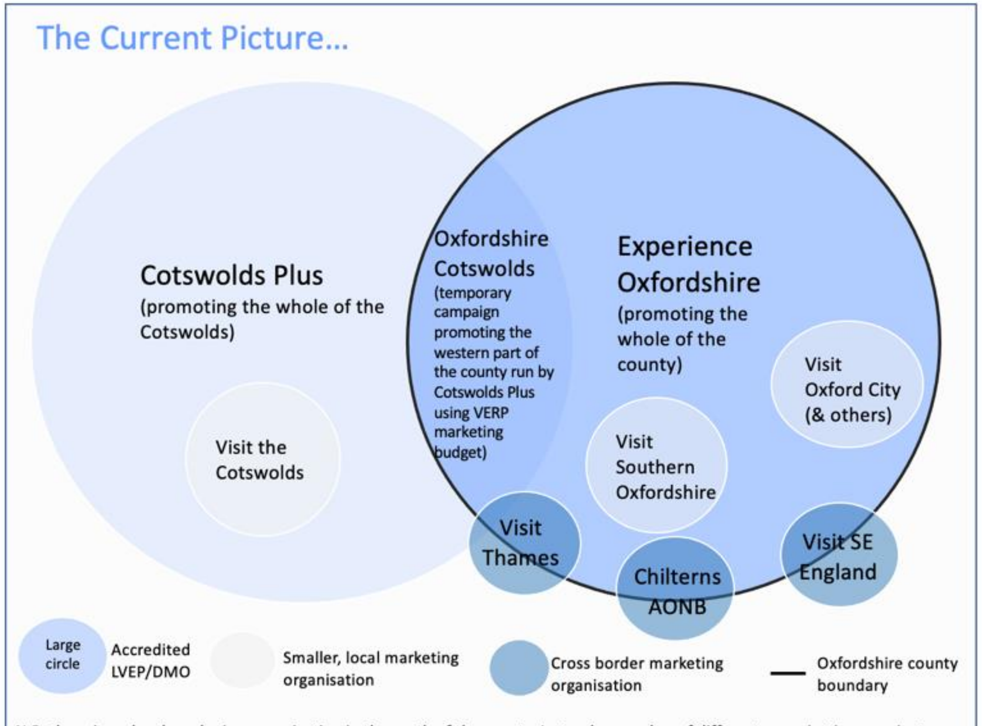
MARKET SEGMENT	WHO THEY ARE	RATIONALE	WHERE'S THE OPPORTUNITY?
 **Business Travellers – UK & International**	▶ Travel for work or professional services including for meeting, events, association conferences, exhibitions etc, often with family members ▶ Seeking quality facilities with flexible space ▶ Looking for leisure-based things to do outside of work hours ▶ Evening and social programmes ▶ Domestic and International	▶ Reinforce county's cutting edge reputation ▶ Aligns with national policy to address opportunities within the Business Events market ▶ Good seasonal spread (autumn/spring) ▶ High value (spend) ▶ Relate to academic strengths and research at Universities	▶ Leveraging benefits (via a newly created countywide convention bureau) from: • extending business trips to take in leisure activities • returning leisure breaks • social programmes • incentive proposition ▶ Maximising the opportunities presented by pipeline developments for larger venue facilities

5 MARKETING THE REGION

Destination marketing activity is generally strong and well established but from a visitor perspective, complex and often disjointed. The aim is to maintain quality but to simplify for the visitor through greater collaboration and more connected experiences that resonate with target markets.

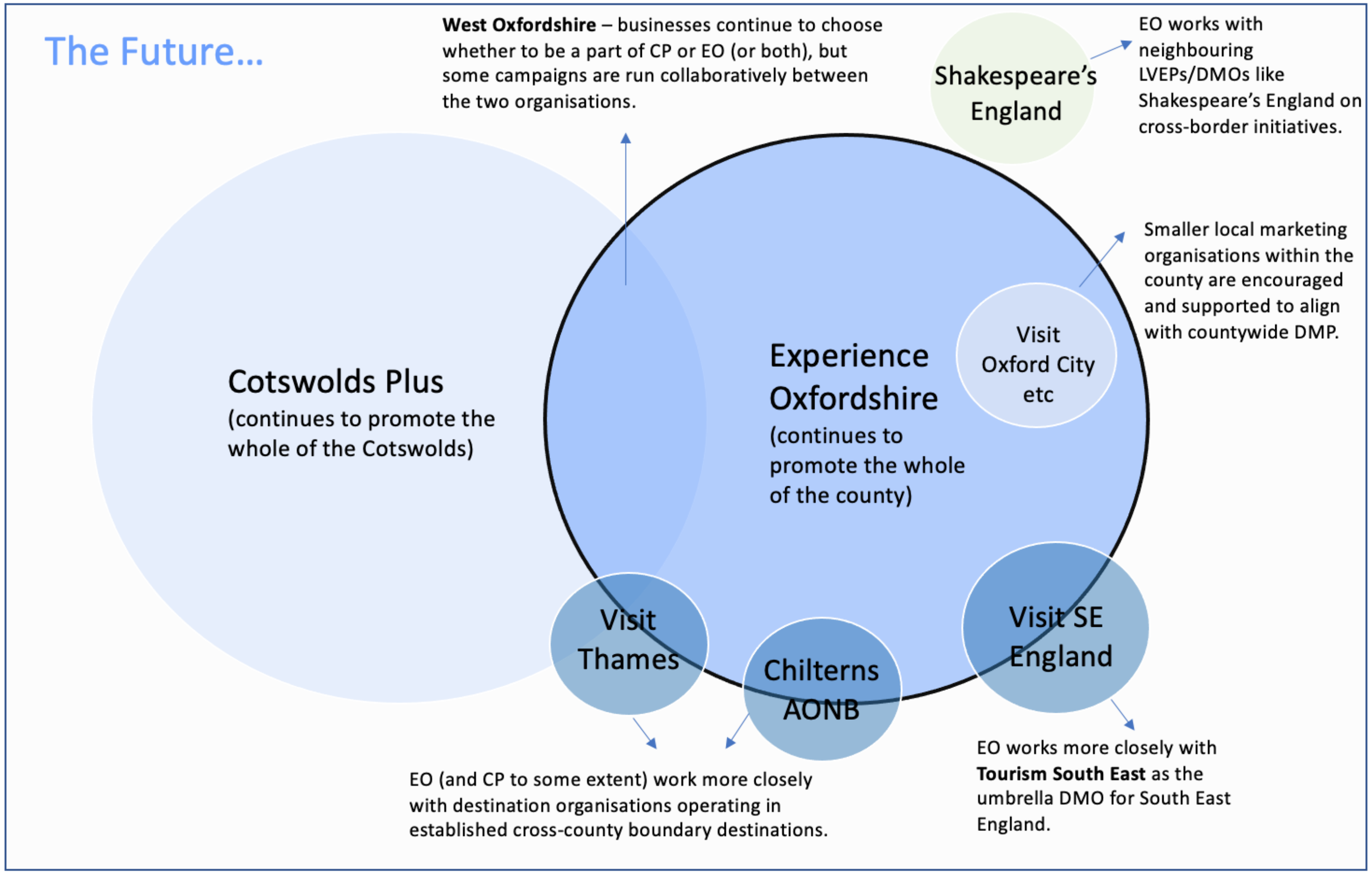
Oxfordshire's official destination marketing is delivered by its accredited LVEP Experience Oxfordshire which is the trading arm of the parent charity, the Experience Oxfordshire Charitable Trust, a not for profit public and private sector partnership organisation covering the whole of the county. Cotswolds 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). And then there are several marketing organisations representing geographic areas that straddle all or parts of Oxfordshire e.g. Visit Thames and Tourism South East. Finally, there are smaller, local marketing organisations/entities operating within the county delivering activity of varying quality. The diagram to the right shows the current set up.

The opportunity to elevate Oxfordshire's profile amongst its target markets lies predominantly in simplifying this set up, bringing Experience Oxfordshire (and to a lesser extent Cotswolds Plus) to the fore as THE destination voices, increasing collaboration between them



N.B. there is no local marketing organisation in the north of the county. Instead, a number of different organisations – private, public and voluntary – deliver activities.

at a campaign level and developing more connected experiences which showcase the critical mass of tourism assets within the county and surrounding areas. As LVEPs they should also look to support and encourage collaboration amongst those smaller, local marketing organisations. The diagram below illustrates broadly how this might work.



Despite this DMP being of and for the county of Oxfordshire, marketing of the destination must be done in a way that resonates most with prospective visitors, rather than abiding by county boundaries. Oxfordshire does not have a meaning in the marketplace in the same way that individual destination brands such as Oxford, the Cotswolds, the Chilterns and the Thames have. These established brands – three of which fall in multiple counties - should lead the way in Oxfordshire's destination marketing content with more cross-border collaboration happening to promote the wider visitor offer.

MARKETING ACTIONS

ACTION AREA 1.1: MAXIMISING POTENTIAL WITHIN THE MARKETING LANDSCAPE		WHO *	TIMELINE
This action area is two-fold: 1) showcasing established destination brands as part of the county's tourism offer to help elevate its position within the marketplace. 2) fulfilling the role of LVEPs as support and supporting organisations collaborating locally and regionally.	**Action 1.1.1 - Carry out an audit of the local marketing organisations/entities** that exist across the county and create a plan to encourage and support them to align with official destination marketing activity.	EO & CP	2023-2024
	Action 1.1.2 - Continue to work with TSE as the umbrella DMO for South East England and with VisitEngland/VisitBritain as the national tourism agency to raise the profile of Oxfordshire to national and international target markets and to enhance its tourism offer by connecting experiences geographically and/or thematically. Look to take advantage of more of the opportunities that exist via TSE to promote the county's business tourism offer more widely.	EO	2023 and ongoing
	Action 1.1.3 - Establish closer working relationships with Chilterns AONB and Visit Thames, ensuring that these destination brands are featured prominently in Oxfordshire destination marketing material where appropriate.	EO/CT as appropriate	2023 and ongoing
ACTION AREA 1.2: CONNECTING EXPERIENCES – PACKAGES & ITINERARIES		**WHO**	**TIMELINE**
Packaging products and experiences into suggested itineraries is an effective way of showcasing the critical mass of product available related to a theme. It allows visitors to see the types of things they could do including those more off-the-beaten-track, authentic experiences and can encourage them to travel to places they may not otherwise, in ways they may not have thought about.	**Action 1.2.1 -** Where gaps in knowledge exist **carry out an analysis of existing experiences** across the county by theme. Themes should be selected based on distinctiveness and appeal to target markets. Recommended themes include: ▶ History & Heritage ▶ Art & Culture ▶ Literary, film and TV ▶ Artisan food & drink – breweries, distilleries and vineyards ▶ The great outdoors – countryside, waterways, walking and cycling trails ▶ Market towns & villages ▶ British motoring heritage	EO & CP	2024-2025

	Action 1.2.2 - Review existing itineraries to ensure the above themes are included. Where there are gaps, **develop a flagship itinerary for each theme** that can be used across existing marketing channels. The itinerary should include several complementary experiences as unearthed in the audit and could lead with a hero product as the jumping off point e.g. Bicester Heritage for British Motoring Heritage. Itineraries should include logical routes and sustainable transport options between experiences and encourage spend by giving suggestions for travel, food & drink and accommodation.	EO & CP	2025–2026
	Action 1.2.3 - Explore the use of OTAs and travel trade as a vehicle to take these new itineraries to market – the online marketplace is important for target markets to gather information and ideas and also for booking so working through these channels will be a useful and targeted route to market. The travel trade is particularly significant for Culture Buffs in some international markets – China being a key one.	EO & CP	2024 onwards
ACTION AREA 1.3: COLLABORATION AND COLLABORATIVE WORKING		**WHO**	**WHEN**
Countywide campaigns and messaging developed and delivered collaboratively between Oxfordshire's LVEPs are more likely to resonate with and have impact on a prospective visitor than multiple campaigns which may duplicate, contradict, or complicate messages.	**Action 1.3.1 - Launch a series of 'Year of…' marketing campaigns** using each of the chosen flagship itinerary themes as a headline act for the campaign each year. Though there is no correct order in which to run the series, it would make sense to develop a programme which leads with the most well established cross-county themes/itineraries, giving time for product and market development in those areas that may require it.	EO & CP taking turns to lead as appropriate to the spotlight theme.	Beginning 2025 and launching one theme per year
	Action 1.3.2 - Create an annual plan that plots key events or likely issues that require joined up communications between the two organisations e.g. University open days. Define key messages for each.	EO	Beginning 2024 and then annually

* Note: EO (Experience Oxfordshire), CP (Cotswolds Plus)

6 SMART AND SUSTAINABLE DEVELOPMENT

The drive for smart and sustainable development will come from strengthening and adding to the already outstanding offer in a way which gets visitors to stay longer, explore widely and spend more.

Oxfordshire is not short of visitor experiences and attractions of national and international repute. But getting visitors to stay longer and spend more means the offer needs to work well across the day, into the evening as well as across the year. The towns and hubs where visitors stay need to offer a rounded experience with outstanding art and culture, food and drink, interesting accommodation and other essential services. So this DMP doesn't advocate creating lots of new experiences – rather it is about making more of what the county already has. Adding to it in a focussed fashion so the visitor experience is more 'rounded'.

The priority areas which can deliver smart and sustainable development are:

- Vibrant Tourism Towns and Local Culture
- Active Outdoors
- Business Tourism – Convention Bureau and Conference Centre Feasibility

There is also an underpinning priority to encourage the development of a stronger 'local' food and drink scene, develop visitor accommodation, support the introduction of planned pipeline projects and enhance the role and relationship with Oxford University as a major draw for visitors. While all of these developments will lead to a more robust visitor economy, they also create the conditions in which wider inward investment is supported by helping to make the county a great place to live, work and invest in.

Each of these priorities are described below with case study examples of good practice, followed by specific actions.

VIBRANT TOWNS & LOCAL CULTURE

Vibrant tourism towns & local culture is all about creating strong hubs for tourism activity outside of Oxford. While some of the county's towns are flourishing others are struggling to attract or keep visitors despite their physical attractiveness. Towns that work well for visitors also work well for local communities. Quality public realm, welcome, signage & orientation, culture by day and night, interesting accommodation and food and drink, interpretation and animation, independent retail as well as basic services are all things that each town needs to look at and plan for. Visitors seek places that are authentic and unusual and different to what they can experience at home.

ACTIVE OUTDOORS

Active outdoors is all about the county as a playground for different visitor markets. Walking, cycling and being active on water are all things which can be enjoyed in Oxfordshire with the breadth of landscapes, trails and routes. The greenways and blueways of the county are well connected, close to major markets and offer an antidote to the stresses of modern life. Creating strong and coherent itineraries (2-5 days) and developing the offer along major routes with investment in the infrastructure that supports active travel will create reasons to visit and support leisure and tourist activity by local communities.

BUSINESS TOURISM

Business Tourism is an area of potential for Oxfordshire. With the reputation of its two Universities, scientific research, good connectivity and wider economic activity, there is potential to drive up business tourism. A countywide convention bureau to develop and convert enquiries is one way to help unlock potential, alongside the development of conference Ambassadors and further exploration of how to progress the feasibility for a purpose-built conference facility in Oxfordshire.

BEST PRACTICE EXAMPLES

VIBRANT TOWNS & LOCAL CULTURE

Frome, a traditional market town in Somerset, has invested in a series of community, cultural and environmental projects that have injected vitality into town. The historic Catherine Hill has been transformed from a rundown shopping street with 60% vacancy levels to what National Geographic describes as "Frome's beating heart ... where you can stock up on life's beautiful things". Some of the town's success is also attributed to the growth of the Frome Independent – a monthly market and street entertainment event that transforms the town centre into a festival-like atmosphere on the first Sunday of every month from March to December.

ACTIVE OUTDOORS

Herefordshire has successfully packaged its outdoors experiences into a coherent visitor offer under the banner of 'Scenic Spots'. As a rural county, Herefordshire is rich in natural landscapes that visitors can navigate either by walking, cycling or on water. The Visit Herefordshire website enables visitor to plan their routes, encouraging them to stay and explore the county and the best it has to offer in terms of local food, culture, countryside and accommodation. With clear signposting to sustainable transport options, the website includes cycling itineraries, inspiration for family outdoors experiences and walking guides for visitors of all abilities.

BUSINESS TOURISM

Meet Bristol & Bath is the official Convention Bureau (CVB) for the two cities and surrounding areas. Part of the LVEP, Visit West the CVB provides sales, marketing and product development support to grow the area's business tourism and conferencing offer. It also supports organisations in preparing conference bids and with the management of conferences. The CVB's website showcases the benefits of hosting a conference in the area, leveraging the strengths of Bristol's facilities alongside Bath's world-class heritage and high quality leisure offer. With three major development projects between 2023 and 2026, Bristol will significantly increase its meetings capacity.

DEVELOPMENT ACTIONS

ACTION AREA 2.1: VIBRANT TOWNS AND LOCAL CULTURE		WHO *	TIMELINE
Stronger tourism towns with a vibrant cultural offer will keep visitors in Oxfordshire for longer and disperse them across the county spreading the benefits of tourism more widely	**Action 2.1.1 - Tourism towns audit and action plan** – undertake a tourism audit (similar to the guidance from Fáilte Ireland) for each of the main market towns and work with the relevant partners on development plans which seek to strengthen the offer. Bring together representatives from the towns to develop lessons that can be shared.	LAs (inc. Town Councils)	2025-2027
	Action 2.1.2 - Art and culture programming – building on previous VERP projects continue to support the growth and development of arts and cultural programming. Promote via 'what's on' type activity and use it to encourage visitors to convert from day to staying visits.	LAs, EO	Ongoing
	Action 2.1.3 - Events strategy – create a countywide strategic events plan to pro-actively develop signature events which can attract staying visitors as well as community events which will add to the animation in local areas. Bring partners together to jointly plan events with a coordinated forward plan.	LAs, FOP, EO	2026-2027
ACTION AREA 2.2: ACTIVE OUTDOORS		**WHO**	**TIMELINE**
Develop and expand the active experiences (cycling, walking, watersport) available across the county to encourage 'slow tourism'. Ensure experience development is balanced with protection of the natural environment.	**Action 2.2.1 - Infrastructure and businesses** – develop the range and quality of trails and routes, including improving accessibility, and encourage investment in hubs and facilities that service visitors (e.g. cycle hire, watersport hubs). Encourage the take up of Walkers Welcome or Cyclists Welcome schemes by tourism businesses.	FOP, EO, CP, VE, National Landscapes & National Trails	2025-2028
ACTION AREA 2.3: BUSINESS TOURISM		WHO	
Grow the volume of discretionary business tourism activity in the county (Conferences, Meetings and Incentives) by generating and converting enquiries and using local ambassadors.	**Action 2.3.1 - Convention Bureau** – establish a countywide Convention Bureau to generate business tourism enquiries and convert them to bookings, working with all business tourism venues including those currently in development. Build an ambassador programme to generate leads for association conferences and to grow the volume of corporate meetings and events retained in the county including within the soon to open Schwarzman Centre for the Humanities.	EO	2024-2028
	Action 2.3.2 - Conference Centre – review previous feasibility studies to determine whether and how a dedicated international conference centre for Oxfordshire can be progressed to capitalise on the internationally recognised research and academic status.	FOP, OxLEP	2025-2028

ACTION AREA 2.4: UNDERPINNING			
Continuing to invest in a quality experience will help Oxfordshire maximise the benefits from tourism. There is also a need to ensure that effective, positive and sustainable planning policies are in placed to assist with these actions. Underpinning projects include…	**Action 2.4.1 - Pipeline projects** – making certain that the investment from proposed pipeline projects is delivered. Actively support applicants to bring investments forward encouraging support for wider policy initiatives e.g. sustainable and accessible tourism, local employment and training etc.	FOP, LAs	Ongoing
	Action 2.4.2 - Accommodation development – encouraging accommodation development that meets the needs of target market segments and maximises the positive impacts from visitors to the county including meeting the needs of business as well as leisure visitors and groups. Encourage all new accommodation to be highly sustainable and accessible and ensure that benefits to local communities are maximised. Accommodation demand studies produced for each district.	FOP, LAs, EO, CP	Ongoing
	Action 2.4.3 - Food and drink development – actively encourage and promote local food and drink production and experiences including connecting tourism businesses with local supply chains, market development and tasting/tour experiences.	FOP, OxLEP, EO, CP	2025-2027
	Action 2.4.4 - The University experience – coordinate and develop the relationship with Oxford University (OU) to manage the visitor experience, ensure it does not detract from the student experience and to tell the story of OU's impact on the world. Collaborate closely with Oxford Brookes University on opportunities which include the arts, creative, digital and business tourism.	OU, OBU, FOP, OCC	2025-2028

* Note: FOP (Future Oxfordshire Partnership), LA (Local Authorities), OU (Oxford University), OCC (Oxford City Council), OBU (Oxford Brookes University)

7 DESTINATION MANAGEMENT

Oxfordshire must achieve a better balance between the needs of communities, business, visitors and the environment and this DMP advocates a more 'hands-on' approach to visitor management.

Oxfordshire has the potential to move up the league table of domestic tourism, capturing more value from the visitors it already has and bringing greater benefits to the host communities. The problems created by visitors need addressing, with a shared ownership of the problems and a partnership approach to tackling them. Partnership working can also support communities and businesses in making visitors feel welcome and, in turn, help visitors to understand their role in visiting responsibly.

With a clear commitment to carbon reduction, all of those involved in tourism need to play a more active role in ensuring that Oxfordshire emerges as a truly sustainable destination.

The following are the main priorities under destination management:

- Sustainable Destination
- Brilliant Basics
- Accessibility, Inclusion and Business Support

This marks a shift from where the destination is now in which the frustrations of local communities are evident and the negative impacts of tourism are all too visible. The main challenge however is that it is not for one organisation to fix and it has implications for a greatly improved partnership approach that brings together the interests of visitors, business, communities and the environment to plan and develop improvements.

SUSTAINABLE DESTINATION

Exemplar sustainable visitor destination should be the ambition for Oxfordshire if the county is to achieve its carbon reduction objectives. It will require a focussed commitment by the whole industry and interventions which result in changes in visitor behaviour, to tourism business operations and destination improvements in infrastructure driven by public sector partners.

BRILLIANT BASICS

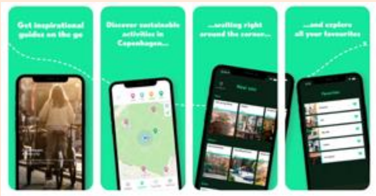
Brilliant basics are the things which are easy to neglect. They are unlikely to be the reasons why a visitor will come – but they will put visitors off coming if they are not being carefully managed. Visitor welcome, first and last impressions, orientation, parking, waste management, public transport, public realm are just some of the services which need to match 'world-class' aspirations for the destination.

ACCESSIBILITY, INCLUSION AND BUSINESS SUPPORT

Accessibility, inclusion and business support will be part of a step-change in Oxfordshire. An advice hub and events will inspire and signpost to information and support on subjects that are vital to all tourism businesses. This will include guidance on sustainability, accessibility, welcome, legal matters, marketing and market insights, training, grants and sourcing suppliers. LVEP status necessitates a role which represents and supports the whole industry.

BEST PRACTICE EXAMPLES

SUSTAINABILITY



VisitCopenhagen has recently launched a sustainability guide to empower visitors to the city to make sustainable choices. The DMO's website is a comprehensive, yet accessible resource making it easier for visitors to choose sustainable options when it comes to food and drink, transport and accommodation. In addition to the website, visitors can download the Planet CPH app enabling them to build an itinerary featuring sustainable businesses and low impact travel options.

BRILLIANT BASICS

Bristol was the first UK city to develop a comprehensive legible city concept. Designed to help improve people's understanding and experience of the city through a programme of identity, information and transportation projects including directional signs, information panels, area maps, walking maps, visitor information and art. During 2021 research among visitors, locals and businesses found that half of visitors still use the scheme to help them find their way around and 97% still found the scheme helpful in discovering quieter and scenic routes not usually recommended via digital tools such as Google Maps.

ACCESSIBILITY, INCLUSION AND BUSINESS SUPPORT

VisitBritain has updated the Business Advice section of its website to support tourism businesses improve their accessibility. As well as being a moral and legal duty, better accessibility offers enormous market potential, as people with health conditions and impairments (alongside their travelling companions) spend around £15.3 billion on trips in England each year. The site offers advice on easy changes businesses can make to improve accessibility and case studies which demonstrate the additional return on investment businesses have achieved by improving accessibility.

MANAGEMENT ACTIONS

ACTION AREA 3.1: SUSTAINABLE DESTINATION		WHO	TIMELINE
Tourism generates significant impacts from travel and the consumption of experiences and accommodation. It's also a diverse sector touching many different businesses and communities. Oxfordshire should ensure the visitor economy contributes to the enhancement and conservation of the county's cultural, natural and heritage assets and minimises damage to the environment.	**Action 3.1.1 - Sustainable destination task force** – because of the breadth and complexity of the sector a public/private sector task force should be created to audit, plan and implement actions to reduce the impact from tourism and to chart actions which can make Oxfordshire an exemplar destination for sustainable tourism. Promote local examples of good practice to encourage adoption by other businesses and organisations and encourage positive visitor behaviour (e.g. use of public transport, buying locally)	EO, CP, LAs	2024-2027
	Action 3.1.2 - Accreditation - sign up to the Glasgow Declaration (or similar) as a commitment at the destination level to change. Encourage sign up and adoption of industry accreditation schemes e.g. Green Tourism and support changes that reduce waste, conserve energy, support biodiversity and local supply chains.	EO, CP	2024 onward
ACTION AREA 3.2: BRILLIANT BASICS		**WHO**	**TIMELINE**
Monitoring and maintaining the essential services and environments that meet the needs and expectation of visitors and which create a positive impression and result in positive advocacy and repeat business. A Welcome scheme is being piloted with funding from VERP and could kick start some of these actions. Improving accessibility and connectivity is vital if Oxfordshire is to be a truly sustainable destination.	**Action 3.2.1 - Welcome, arrival and public realm** - review and improve first and last impressions of the destination (including visitor information). Create quality public realm which encourages increased dwell.	LAs, EO	2024-2026
	Action 3.2.2 - Access, orientation and transport – review access requirements from visitors and how investment can meet their needs e.g. signage in languages other than English. Develop and improve transport hubs as points of arrival and dispersal for visitors. Positively influence transport planning investment at the county council and align to the Local Transport and Connectivity Plan to meet the needs of visitors as well as local communities and which improves the viability of rural transport. Improve signage and orientation for pedestrians and direct visitors to attractive neighbourhoods (e.g. Jericho or Cowley Road in Oxford). Address issues including coach tourism and drop-off/pick up in key locations.	LAs	2025-2028
	Action 3.2.3 - Community advocacy – LVEPs to support local authorities with the tools and messages to make the case to local communities of the benefits that come from having a strong and vibrant visitor economy. To highlight the benefits in terms of jobs, earnings, quality of life and support for the things which residents value (heritage, culture, retail, pubs etc)	LAs, EO (CP)	2025-2028
	Action 3.2.4 - Direct funding options – explore options for a tourism levy or accommodation or tourist BID to directly and sustainably fund destination marketing and management alongside public and business funding.	FOP, LAs, OxLEP	2024-2026

ACTION AREA 3.3: ACCESSIBILITY, INCLUSION AND BUSINESS SUPPORT		WHO	
World class destinations are built on the experiences provided by incredible businesses. Bringing businesses together to learn from and work with each other, to access rich insights, inspiration and advice and to collaborate will help improve and innovate the visitor offer.	**Action 3.3.1 - Accessibility & Inclusivity** – signpost and provide training/ events for the sector. Increase the number of businesses making improvements with accessibility champions, accessibility guides, accessible facilities as well as dementia and autism friendly initiatives. Showcase examples of best practice from within Oxfordshire.	EO, CP, LAs	2024-2028
	Action 3.3.2 - Walkers/ Cyclists Welcome – as well as improved accessibility across the tourism industry by developing business accessibility guides, expand adoption of the Walkers Welcome and Cyclists Welcome accreditation to align with the development priorities.	EO, CP, OxLEP	2024-2025
	Action 3.3.3 - Advice hub – create a comprehensive advice hub that provides insights and information and signposts the industry to all the support that is available from national, regional and local providers. This needs to be available to all tourism businesses in the destination and reflects local needs and circumstances.	EO, CP, OxLEP, LAs	2024-2025
	Action 3.3.4 - Skills – business engagement with schools and education to raise the profile of the sector; promote the living wage; and identify and support business in addressing skills gaps including the use of automation and technologies to improve productivity.	EO, CP, LAs, Universities	Ongoing
	Action 3.3.5 - Data & Insights – understanding visitor sentiment, visitor behaviours as well as tourism performance are vital to help shape services and visitor experiences. They are also necessary to track and monitor performance and understand if interventions are making a positive difference. Chapter 9 of this DMP covers this in greater detail.	EO, CP	2025-2028

8 PARTNERSHIP & RESOURCING

A renewed partnership approach to managing, marketing and developing the destination is needed to support delivery of this DMP and make the most of the opportunities for Oxfordshire.

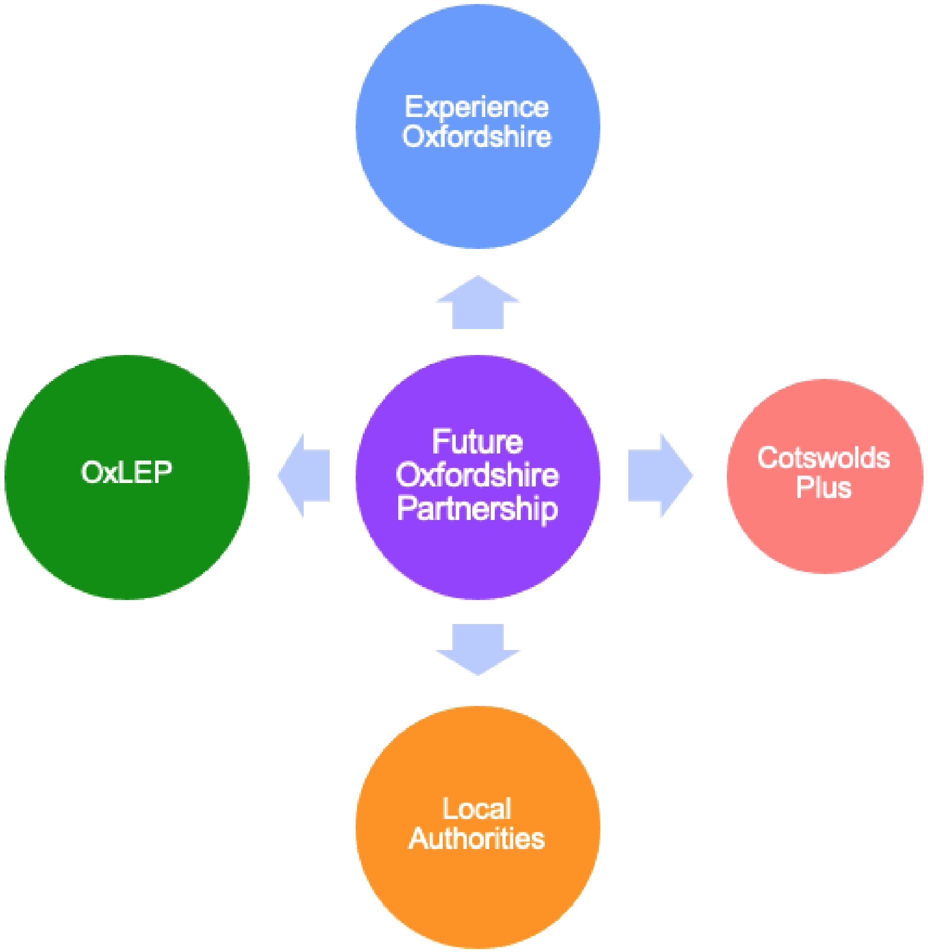
The successful delivery of the DMP is not in the gift of one organisation. It will require a collaborative approach to partnership that recognises the different strengths and roles of each stakeholder. Destination management done well will need the LVEPs, public sector partners, private business, education and national bodies to all play their part.

The official LVEP status for Experience Oxfordshire and Cotswolds Plus places them in a critical position. Both organisations are the natural lead organisations for destination marketing and the sales activity across business tourism and travel trade. They are important links to the tourism industry in their respective areas and also to the national tourist boards (VisitEngland/VisitBritain) and through them to the Department for Culture, Media and Sport. They are also the organisations which need to advocate for visitors and will have the greatest understanding of visitors and their needs which will in turn influence destination management and business/partner activity. As the LVEP programme develops we would expect more collaborative working across the two Oxfordshire LVEPs, in particular around areas of common interest (sustainability, accessibility, data and insights etc). As we have said previously we expect EO to be the lead for pan-Oxfordshire priorities, recognising that though there is an overlap, the remit of EO aligns to the whole county.

Local Visitor Economy Partnership
Recognised by
VisitEngland

The Local Authorities have a vital role – they are responsible for, or strongly influence, much of what the visitors experience. They also have the closest relationship with local communities and the county's residents. But they are usually less aware of what visitors think or need from a destination.

So there needs to be a way in which these partners come together and we propose a role for the Future Oxfordshire Partnership (FOP) to convene the different partners with the DMP being nested within the Partnership's Strategic Vision. FOP, which is a joint committee of the six councils of Oxfordshire plus strategic partners, was established to deliver a better future for the county and deliver on the bold aims articulated in its vision and which it does by overseeing the delivery of projects that the councils of Oxfordshire are seeking to deliver collaboratively in the fields of economic development and strategic planning. It will provide overall oversight and monitoring of the DMP within Oxfordshire, helping to identify funding and resources to support implementation. OxLEP will support FOP in this role, providing a link to the wider economy, local business and also to Government objectives and potential funding programmes. This proposed partnership arrangements at a strategic level are illustrated here:



This approach is one that works for Oxfordshire. It respects the important role that the LVEPs have in meeting the destination management role which they are tasked with by VisitEngland but also acknowledges that many of the practical ways in which destination management is delivered needs a whole system approach and commitment.

In taking forward the DMP, the roles of the lead organisations are often distinct from each other. The diagram on the next page illustrates how these lead partners would align with the main stakeholders.

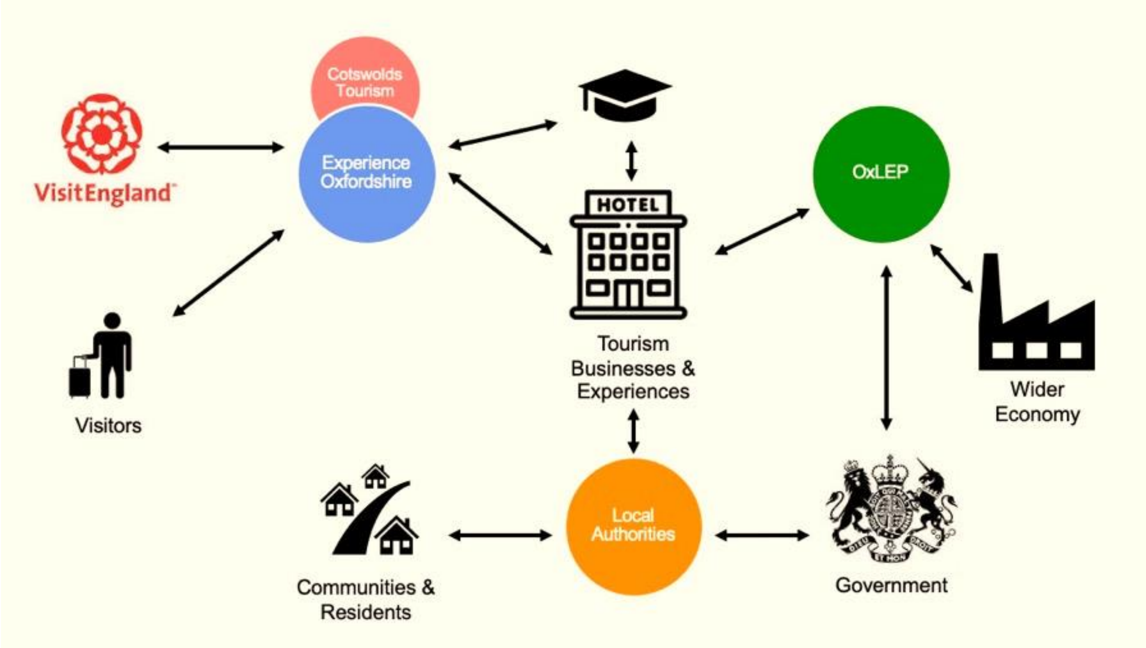
In practice this would mean that partners would lead on the following types of activity.

Future Oxfordshire Partnership:

- DMP oversight & partner co-ordination
- Alignment to SEP and FOP vision

LVEP:

- DMP monitoring to VisitEngland/DCMS
- National tourism projects and priorities
- Destination marketing
- Funded destination management projects
- Visitor insights & data
- Convention bureau
- Support development proposals



Local Authorities:

- Resident/community engagement
- Visitor welcome and public realm
- Sustainable transport
- Landscape & access
- Development and planning
- Directly run experiences

OxLEP:

- Visitor Economy Renaissance Programme delivery
- Broker of visitor management projects
- Monitoring DMP progress (in county)
- Managing strategic partnerships (LAs, AONBs, Government)
- Accessing funding and grants for projects
- Strategic economic plan links
- Business support

Other stakeholders, including the Universities and education providers and tourism businesses, will have an important role in supporting this DMP. As projects are developed the way in which these stakeholders will be involved will be developed with clear roles and targets.

RESOURCES

As the first DMP for Oxfordshire, there are priorities and actions in this plan which are currently unfunded in particular in relation to destination management. There is therefore a need to be realistic about what can be achieved and a recognition that to make a step change in and address the challenges highlighted will require investment. As a general rule in other destinations, local authority funding is required to address the destination management challenges, while business investment is secured to support destination marketing. In taking the DMP forward, the FOP should be mindful of the need to identify resources before progressing priorities which are currently unfunded and there is no default assumption that partners can absorb the actions and priorities identified in this plan. Consideration should also be given to exploring alternative funding sources including visitor levy and/or accommodation or tourism BID opportunities. A separate funding strategy will be developed alongside this DMP to identify potential sources of funding.

Indicative implications in resource and costs arising from the plan are set out below. More detailed costings will need to be developed as projects are worked up.

Action Area	Additional Staff Resource	Additional Delivery Costs	Notes
Marketing actions (1.1 – 1.3)	1 – 1.5 FTE required to deliver the work programme	£25,000-£50,000 for itinerary development (one-off) £100,000+ p.a. for campaign delivery	These could be shared resources across the two LVEPs that cover Oxfordshire, weighted appropriately to match geographic coverage. The resourcing of the DMP should be considered as part of overall allocations to delivery organisations and ongoing commitments and priorities.
Smart & sustainable development actions (2.1 – 2.4)	2 – 3 FTE focussed on product development and convention bureau activity	£50,000-£100,000 p.a. for one-off projects e.g. tourism towns audit and regular activity e.g. convention bureau	
Destination management actions (3.1 – 3.3)	1 - 2 FTE across new programmes for sustainable tourism, brilliant basics and business support	£50,000-£100,000 p.a. for project delivery and relevant studies	
Monitoring		£50,000 p.a. for monitoring action in following section (not already contained in data/insights action)	

9 MONITORING

To support Oxfordshire's ambitions for tourism we recommend monitoring performance in three key areas – Market Reach, Market Development and Product Development. This recommended programme of research and monitoring is intended to provide robust insight at a pan-county level as well as at an individual district and borough level, where possible.

Commissioning syndicated research (i.e. where Oxfordshire local authorities can agree an overall approach via pooled resources) via the LVEP as the experts in visitor research is likely to provide the most effective way to achieve market insights at a pan-county and local level as well as offering data sharing benefits and cost efficiencies. Experience Oxfordshire will also have a formal role in monitoring progress of the DMP to VisitEngland (as will Cotswolds Plus for the Cotswolds).

1. Market Reach			
What to measure	**Where to measure it**	**How to measure it**	**Recommended approach**
Destination awareness/familiarity	Omnibus survey	Scale from: 'I've never heard of it before' to 'It's a place I know very well'	Benchmark Oxfordshire versus other GB counties and ask for key locations across Oxfordshire (e.g. Oxford city, Cotswolds, Chilterns, Thames Valley)
Past visitation	Omnibus survey	Scale from 'I've never visited before' to 'I've visited within the last 5 years'	
Sentiment – perceived welcome	Omnibus survey	Scale from 'disagree strongly to 'agree strongly' on 'It's a destination that makes all visitors feel welcome, no matter who they are or where they're from'	
Intention to visit	Omnibus survey	Scale from 'I would never consider visiting' to 'It's a place I'd definitely consider visiting'	

2. Market Development			
What to measure	**Where to measure it**	**How to measure it**	**Recommended approach**
Visitor numbers	Cambridge economic model	Total and split by day and staying visits	At Oxfordshire level and by local authority area (city/district).
Average length of stay	Cambridge economic model	Average number of nights stayed	
Average spend per visit	Cambridge economic model	Total average and split by day and staying visits	
Seasonal spread	Cambridge economic model	Monthly spread of visits (Total and split by day and staying visits)	
Visitor profile & experience	Visitor survey	Visitor home location, demographics, reasons for visiting, locations and attractions visited, satisfaction, recommendation, likelihood to return	Surveys at key points of the year to give a representative view of peak and low seasons. Analysable samples required for each local authority area
Resident perceptions	Resident survey	Resident activities/experiences of visitor economy; perceived benefits/impact of visitor economy on employment, environment and quality of life; attitudes towards visitors & visitor behaviours	Annual survey. Analysable samples required for each local authority area

3. Product Development			
What to measure	**Where to measure it**	**How to measure it**	**Recommended approach**
Itinerary development	Number of new itineraries developed which include overnight stays in Oxfordshire; number of new	Count	Annually among in-scope operators

3. Product Development			
	itineraries which increase dwell time in Oxfordshire		
Accommodation occupancy	Local accommodation provider study or equivalent e.g. STR hospitality data	Rate calculated on number of available units	Annual reporting
Accommodation revenue per available room	Local accommodation provider study or equivalent e.g. STR hospitality data	Assess alongside occupancy levels	Annual reporting
Sustainability accreditation	Number of businesses achieving sustainability accreditation (e.g. Green Tourism scheme)	Count	Annual count of visitor economy businesses
Accessibility & inclusion	Number of businesses offering an accessibility guide; number of staff having undertaken accessibility & inclusion training	Count	Annual count of visitor economy businesses
Destination sustainability	Carbon impact from visitors; strength of local sourcing and supply chain	Carbon footprinting via a qualified consultant	Establish baseline; subsequent annual reporting