COTSWOLDS TOURISM DESTINATION MANAGEMENT PLAN

2022 - 2025

Destination Management Plan for the Cotswolds (2022-25)

Introduction

The Cotswolds are a range of hills that stretch 80 miles from north east to south west through six counties, the majority in Gloucestershire and Oxfordshire, but also reaching into parts of Wiltshire, Bath & North East Somerset in the south,as well as Worcestershire and Warwickshire in the north. The area designated as the Cotswolds Area of Outstanding Natural Beauty (AONB) - over 2,000 square kilometres/800 square miles - forms the core of the Cotswolds as a destination.

However, as a visitor destination, the Cotswolds covers a larger and less clearly defined area. Many of the best known 'Cotswold' names and attractions lie outside the AONB area: Cirencester, the 'Capital of the Cotswolds', Cotswold Wildlife Park, Cotswold Water Park. The Cotswold countryside certainly has an outstanding natural beauty but what makes the area so special, indeed unique, is the unparalleled concentration of picturesque towns and villages built from the characteristic golden limestone.

The map outlines the Cotswolds destination area and is for illustrative purposes only (darker shaded area = AONB)
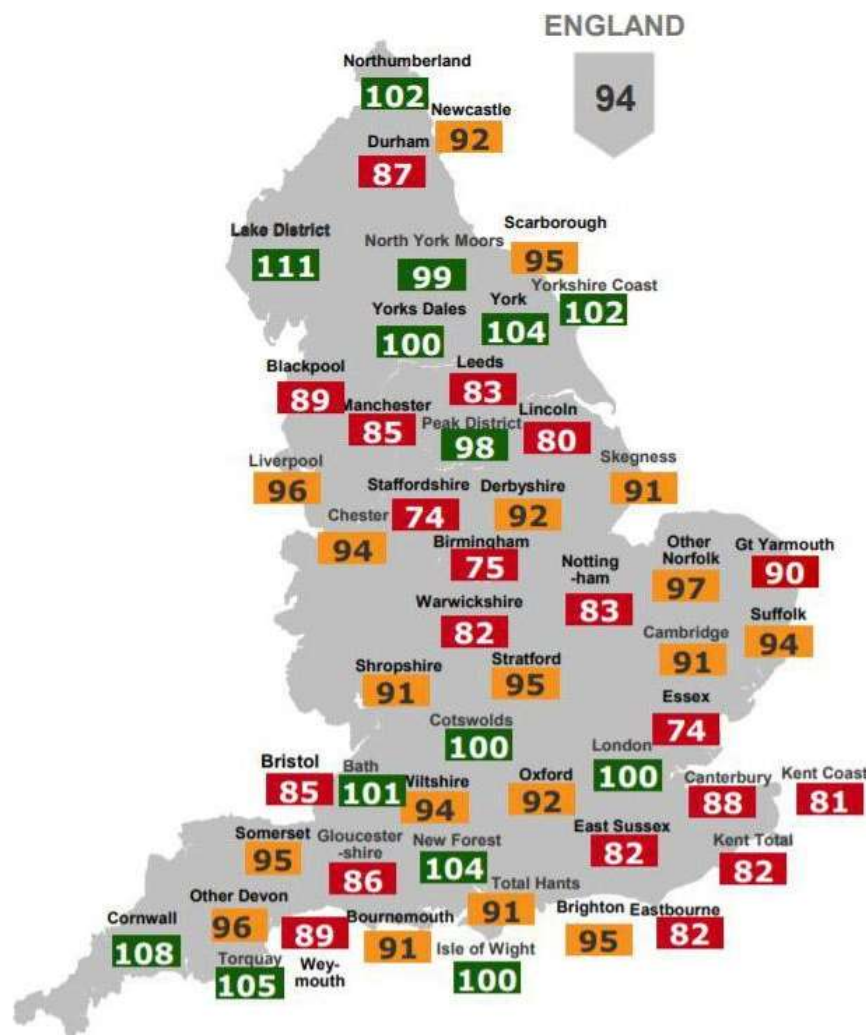
The Cotswolds is a popular, well performing destination with high awareness and appreciation, however it needs to communicate that it has an appeal far beyond its most famous villages and that it is more than just the clichéd 'Quintessential England'.

The area has a broad range of fascinating attractions and experiences, a great food and drink offer including distinctive local produce, a vibrant arts and cultural scene, superb walking and cycling opportunities, outstanding accommodation, a year round events programme and a wide and eclectic choice of independent retail shopping.
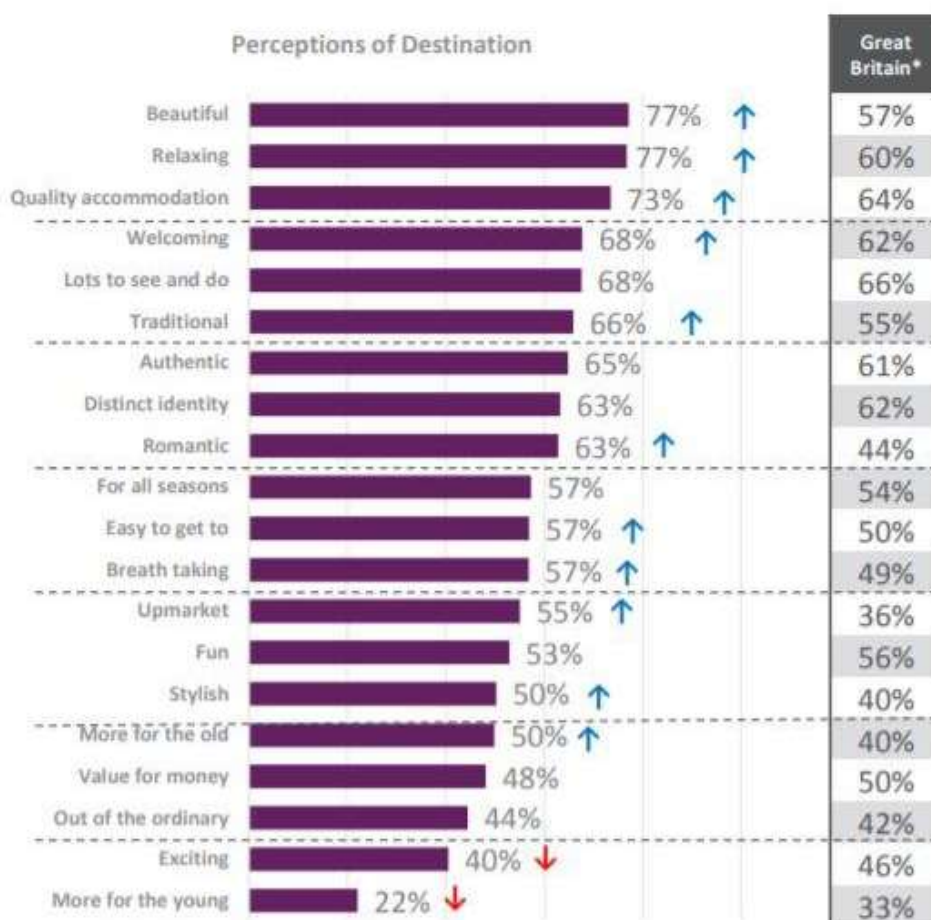
Perceptions of the Cotswolds

The importance of the Cotswolds brand was recognised in Visit England's Strategic Framework for Tourism 2010 – 2020 which refers to the Cotswolds as 'one of England's long established and world-renowned "attract" brands'.

VisitEngland have discontinued individual destination research - it was felt that there was insufficient variation between reports to justify the expense. The last reports clearly showed that the Cotswolds was a high performing destination with the brand enjoying high levels of approval and significantly rated above national averages on most categories.

[VisitEngland Visitor Satisfaction Report 2014](#)

Perceptions of Destination		Great Britain*
Beautiful	77% ↑	57%
Relaxing	77% ↑	60%
Quality accommodation	73% ↑	64%
Welcoming	68% ↑	62%
Lots to see and do	68%	66%
Traditional	66% ↑	55%
Authentic	65%	61%
Distinct identity	63%	62%
Romantic	63% ↑	44%
For all seasons	57%	54%
Easy to get to	57% ↑	50%
Breath taking	57% ↑	49%
Upmarket	55% ↑	36%
Fun	53%	56%
Stylish	50% ↑	40%
More for the old	50% ↑	40%
Value for money	48%	50%
Out of the ordinary	44%	42%
Exciting	40% ↓	46%
More for the young	22% ↓	33%

[VisitEngland's Cotswold Destination Report 2019](#)

The value of tourism

...at a national level

In 2019 VisitEngland research showed that tourism generated over £100 billion a year for England's economy, employing over 2 million people and supporting thousands of businesses.

- British residents spent £19.5 billion on 99.1 million domestic overnight trips in England
- Overseas visitors to England spent £24.8 billion on 36.1 million trips.
- 1.4 billion domestic day trips were taken with spending totalling £56.5 billion.

...at a local level

Figures are collected on local authority boundaries making meaningful statistics trickier. However a reasonable approximation can be reached by adding Gloucestershire and West Oxfordshire figures together. 2019 data (from Economic Impact Studies by The South West Research Company) showed:

- 2.4m domestic staying trips to the Cotswolds with £416 million in spend
- Overseas visitors spent £189 million on 371,500 trips.
- 23 million day trips were taken to the Cotswolds with spending totalling £804 million
- Tourism in the Cotswolds supported almost 31,000 jobs, 8% of the total.

The effects of the Covid pandemic

In March 2020, the pandemic saw the tourism industry shut down completely overnight and since then it has struggled to recover fully. The lockdowns, especially the first in March 2020, caused huge disruption with almost all businesses significantly impacted. As a rural destination with a long-established domestic tourism market, demand quickly revived for many businesses as lockdown restrictions were eased. The difficulties involved in overseas travel have seen a very significant upturn in both staycations and day visits.

However the effects have been uneven with some sectors, particularly those reliant on overseas visitors, group visits, business or travel trade, struggling to recover and trying to pivot their offer to other markets. Even when able to open, most businesses have found their operating capacity restrained and overheads increased by changes needed to comply with social distancing. Staffing shortages generally but particularly in food and beverage settings have been and continue to be a major issue and constraining factor in business recovery.

There are still major concerns over the course of the pandemic but while the domestic holiday market is expected to have largely recovered by the end of 2022, international visitors are unlikely to reach pre-pandemic numbers until 2024.

The structure of tourism

...at a national level

VisitBritain is the national tourism agency, responsible for marketing the nations and regions of Britain overseas to drive growth in international leisure and business tourism. VisitEngland is the national tourist board for England, responsible for marketing England to domestic and established overseas markets and for improving England's tourism product.

...at a local level

Cotswolds Tourism is the official Destination Management Organisation working to develop and manage the destination, as well as promoting and marketing the Cotswolds nationally and internationally. A public-private sector membership organisation (with some 500 business members), Cotswolds Tourism is a partnership of tourism businesses, supported by local authorities who appreciate the importance of the Cotswolds brand and the increased benefits that working across a wider area brings to their own specific areas. Hosted by Cotswold District Council, Cotswolds Tourism is supported with resources by West Oxfordshire District Council and Cotswold District Council with Cotswolds National Landscape, Cheltenham Borough Council & Marketing Cheltenham, Tewkesbury Borough Council, and Stroud District Council as strategic partners.

The de Bois Report on DMOs

In September 2021, the de Bois review of Destination Management Organisations in England, commissioned by DCMS, was published. The review examined and assessed how Destination Management Organisations across England are funded and structured, and how they perform their roles, in order to establish whether there may be a more efficient and effective model for supporting English tourism at the regional level, and if so what that model may be.

The report made a number of recommendations and called for a substantial reduction in the overall number of DMOs and a tiered structure for DMOs with central government providing core funding for the top tier organisations, Destination Development Partnerships. If the reports recommendations are adopted by government, there is likely to be a significant restructuring of tourism nationally.

The roles of visitor economy stakeholders

There are many organisations throughout the Cotswolds that have a role to play in managing tourism and the visitor economy across the destination. The DMO needs to work in collaboration with them to try and ensure delivery of the DMP.

Organisation	Main areas of responsibility
Cotswolds Tourism	- Overall responsibility for monitoring the delivery of the Destination Management Plan (DMP) - Presenting a coherent voice for the local visitor economy - Representing tourism and the visitor economy at a national level - Providing guidance on ensuring the quality of the visitor experience - Gathering evidence and monitoring - Developing and managing the destination branding, marketing and website - Engagement of local private sector - Seeking and promoting funding opportunities for tourism development - Co-ordinating appropriate visitor information provision with partners
Local authorities	- Public realm – appearance and maintenance - Transport planning and supporting provision – infrastructure - Strategic Planning, heritage, conservation and development management - Economic Development - Public health, safety and wellbeing - Public/visitor services – toilets, car parking, waste, utilities - Access, rights of way, countryside management - Event and venue licensing
Cotswolds Conservation Board	- Conservation and enhancement of natural beauty/heritage - Visitor access, enjoyment and understanding of protected area - Management of the Cotswold Way

	- Economic and social wellbeing of the community - Encouraging and promoting sustainability and green tourism practices. - Caring for the Cotswolds visitor giving scheme
Town and Parish Councils	- Future direction for area/community - Local place-making: aspects of public realm/visitor services - Neighbourhood planning - Local activities, events
Local Enterprise Partnerships (GFirst and OxLEP plus others where appropriate)	- Economic/ business development, including sector support - Investment promotion - Funding of enterprise focussed initiatives
Individual tourism businesses	- Development and operation of most visitor facilities - Creating and maintaining employment - Product development and improvement - Promotion of business and link to destination brand - Visitor welcome, orientation and care - Place-making for the destination
Other local/voluntary groups (e.g. local civic societies, business associations, heritage, arts/culture groups)	- Presentation/interpretation of heritage – sense of place - Local, regional and national events and initiatives - Support for community and business engagement - Representing environmental interests - Local knowledge and expertise
Local landowners	- Provision/management of access to key sites - Future development opportunities - Festival and event locations

Vision for tourism in the Cotswolds

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

The vision for tourism in the Cotswolds encapsulates the key challenge and opportunity for the Cotswolds: to fully embrace sustainable tourism, ensuring that the local economy is economically, environmentally and socially sustainable.

Cotswolds Tourism overarching objectives are all intimately linked with sustainability: supporting local businesses to achieve sustainable growth; spreading visitor numbers geographically and seasonally; championing the move to digital; striving to maximise the benefits of tourism, while minimising the impacts; and efforts to make the destination more accessible and inclusive.

Priorities for action

Sustainability

The Cotswolds welcomes some 25 million visitors per year, which has a significant impact on our landscape, heritage and communities. It is essential that both tourism businesses across the Cotswolds and visitors to the area adopt sustainable practices in order to mitigate this impact.

Although there are many aspects beyond our control, such as use of high carbon transport to reach the UK by overseas visitors, and lots of barriers to overcome, such as a lack of sustainable transport in rural areas, Cotswolds Tourism can be instrumental in developing sustainable tourism practices across the region by working in collaboration with other regional and local organisations, as well as businesses and visitors.

Key objectives:
- To increase usage of sustainable transport by visitors when travelling to and around the Cotswolds.
- To encourage businesses to adopt sustainable practices and to develop sustainable tourism messaging to all stakeholders and visitors.
- To encourage the use of local produce and suppliers to support the development of better local supply chains.
- To improve information provision to encourage visitors to travel more responsibly when in destination.
- To encourage visitors to respect the unique Cotswolds landscape and local communities, and encourage participation in the Caring for the Cotswolds payback scheme.
- To encourage a better geographical and seasonal spread of visitors to lessen the impact on the landscape and its residents.
- To promote the co-benefits of active travel (walking and cycling) on health and wellbeing - as well as reducing carbon emissions.

Partnership

From the visitor's perspective, the Cotswolds is one destination, yet this large area crosses many local authority boundaries and comprises many different organisations and private sector partnerships, which can result in duplication of effort and ineffective use of resources.

Partnership working between public and private sector organisations, tourism businesses and local communities across the wider Cotswolds is essential to ensure their combined efforts have the maximum benefit for the local visitor economy.

Key objectives:
- To maintain and improve the tourism partnerships across the Cotswolds to coordinate delivery of the destination management plan.
- To work with and support businesses and organisations in achieving their objectives.
- To identify opportunities for external funding to implement elements of the Destination Management Plan.
- To maintain an effective partnership mechanism between Cotswolds Tourism and the wider visitor economy stakeholders.

Product – enhancing the visitor experience

The visitor economy is not only about the accommodation, attractions, pubs, shops and restaurants but also refers to the wider environment that can impact and influence the overall visitor experience such as footpaths, car parks, public toilets, tourism signage, accessibility and public transport networks, as well as the more intangible aspects such as friendliness, value for money and a sense of place.

Visitor expectations are constantly changing and there is a need to meet, and ideally exceed, those expectations through the provision of innovative, value for money products, high quality services and memorable visitor experiences: the better the visitor experience, the greater the likelihood of recommendations and repeat visits.

Key objectives:
- To develop a sense of place by encouraging enjoyment and understanding of the natural, historic and cultural heritage of the Cotswolds.
- To advocate for investment and improvements to the wider destination infrastructure
- To ensure all visitors receive high quality service and experiences throughout their destination journey.
- To maximise visitor distribution across the Cotswolds and throughout the year
- To work with businesses and organisations to develop engaging new experiences, particularly those available year round.
- Ensuring visitors can easily access reliable up-to-date information to simplify planning and maximise enjoyment of their visit.
- To improve information provision for those with access needs and to encourage better accessibility within businesses

Marketing – developing the Cotswolds brand and its core values

The Cotswolds is a well-known brand but work is needed to widen and reinforce its appeal, to counter potential misconceptions and to showcase new products and developments.

Marketing is about growing the value of tourism to the local economy but not necessarily the volume. It needs to be sensitive to the impacts that excessive footfall and high impact activities, such as full sized coaches, can have on resident communities. The Cotswolds doesn't suffer the sharp seasonal peaks and troughs of many other destinations, such as Cornwall, and therefore has the scope to build on its offer as the ideal year-round destination which will help to develop a stronger, more sustainable visitor economy.

A co-ordinated and consistent approach should be developed for destination marketing which aims to reduce duplication across the Cotswolds and make best use of limited resources. Marketing should, where possible, reflect VisitEngland's national priorities and campaigns and include wherever possible a collaborative approach with neighbouring brands such as Bath, Stratford and Oxford on areas of mutual interest and benefit.

Even before the Covid pandemic the importance of traditional printed brochures was waning steadily. This trend has been vastly accelerated by the pandemic and the move to more sustainable practices: **digital marketing** should now be considered the default position.

Key Objectives:
- To strengthen the Cotswolds brand and profile as a leading year-round destination.
- To keep abreast of new technologies and ensure that Cotswolds Tourism maximises the opportunities these offer for cost effective marketing.
- To develop innovative marketing plans that achieve maximum exposure.
- To investigate new opportunities for enhancing and supporting year-round products, events and activities.
- To ensure marketing works to spread visitors geographically and seasonally.
- To showcase new products and developments to counter potential misconceptions of the Cotswolds.

Knowledge and data

The future marketing and development of the Cotswolds needs robust and up-to-date intelligence and data on the value, volume and patterns of the visitor economy, along with key insights into current and new target markets and the perceptions and experiences of visitors. At present there is little reliable data for the Cotswolds.

Lack of data is a problem at a national level, a fact acknowledged by VisitEngland, but at a local level more frequent and detailed industry research including satisfaction and tourism impact surveys, marketing and campaign evaluation, and other intelligence gathering would help improve tourism-related decision making in the Cotswolds.

Key Objectives:
- To commission annual economic impact studies for the Cotswolds.
- To explore and develop systems for monitoring visitor satisfaction, marketing effectiveness and business performance.

- To investigate ways of tracking visitor footfall numbers and trends across the Cotswolds, particularly in areas prone to high visitor numbers.
- Continued analysis of traffic and sentiment on the Cotswolds.com website and social media channels.
- Track local business activity and sentiment.

Performance - building excellence through networking and collaboration

The great majority of businesses involved in the visitor economy in the Cotswolds are small or micro businesses, which often means that skills within the businesses are concentrated in certain areas and other skill sets may be limited or missing. This issue calls for focussed training, as well as networking and collaboration opportunities, which are hugely beneficial to tourism businesses who place great value on the ability to share ideas, cross-promote and liaise with other like-minded businesses and tourism professionals on a regular basis.

Excellence across the Cotswolds in the form of hospitality, customer service and visitor welcome should be endorsed and promoted. Investing in developing the necessary skills to run successful businesses and to provide the high levels of customer service that visitors expect should be encouraged.

The DMO has an important role to play in facilitating improvements by promoting networking, training and potential funding opportunities, as well as encouraging greater use of local produce and suppliers - an important aspect of developing a sustainable visitor destination for the Cotswolds.

Key Objectives:
- To increase B2B connections encouraging greater use of local produce and suppliers.
- To offer opportunities for B2B communication and sharing of best practice.
- To encourage the development of sustainable business practices that deliver economic, environmental and social benefits for the wider visitor economy.
- To provide regular business updates on developments, opportunities and training available to local visitor economy businesses.
- Supporting businesses to adopt and best utilise new technologies and to continually improve their online presence.