



# Shared Tourism Service

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# Your Local Visitor Economy: Volume and Value

	Cotswold
<b>Staying</b> Visitor Trips	568k
<b>Staying</b> Visitor Nights	1.82m
<b>Staying</b> Visitor Spend	£133m
<b>Staying</b> Visitor Spend per visit	£235
<b>Day</b> Visits	6.8m
<b>Day</b> Visitor Related Spend	£222m
<b>Day</b> Visitor Spend per visit	£33
<b>Total Business Turnover</b> Supported	£361m
Estimated Actual <b>Employment</b>	7,286
<b>Proportion</b> of Employment	18%

# Visitor Economy Spend: Cotswold District Council

The Value to our economy...

- ▶ **Attractions - £50m**

- ▶ Day visitors £36m, Staying £14m

- ▶ **Accommodation - £51m**

- ▶ **Shopping / Retail - £79m**

- ▶ Day visitors £59m, Staying £21m

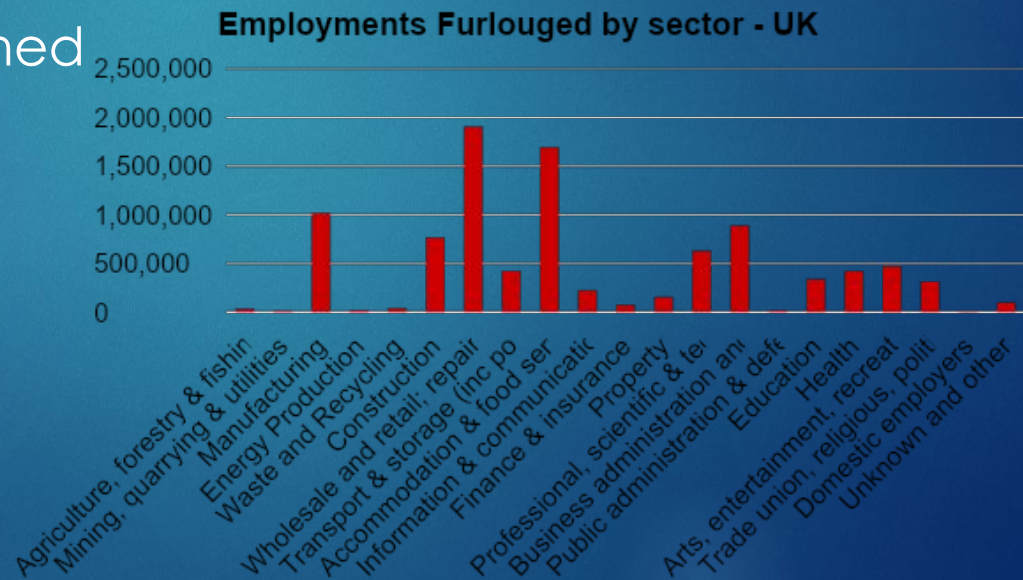
- ▶ **Food & drink - £123m**

- ▶ Day visitors £94m, Staying £29m

# The impact of Covid-19

The visitor economy came to an almost complete halt in March

- ▶ Accommodation: closed except a few for key workers
- ▶ Attractions: little opportunity to diversify
- ▶ Food & drink: a few were able to offer takeaway services
- ▶ Retail: best placed to move to online sales but most visitor related sales are either low value or impulse buys
- ▶ High levels furloughed
- ▶ Events cancelled



# Visitor Economy: Covid-19 effects



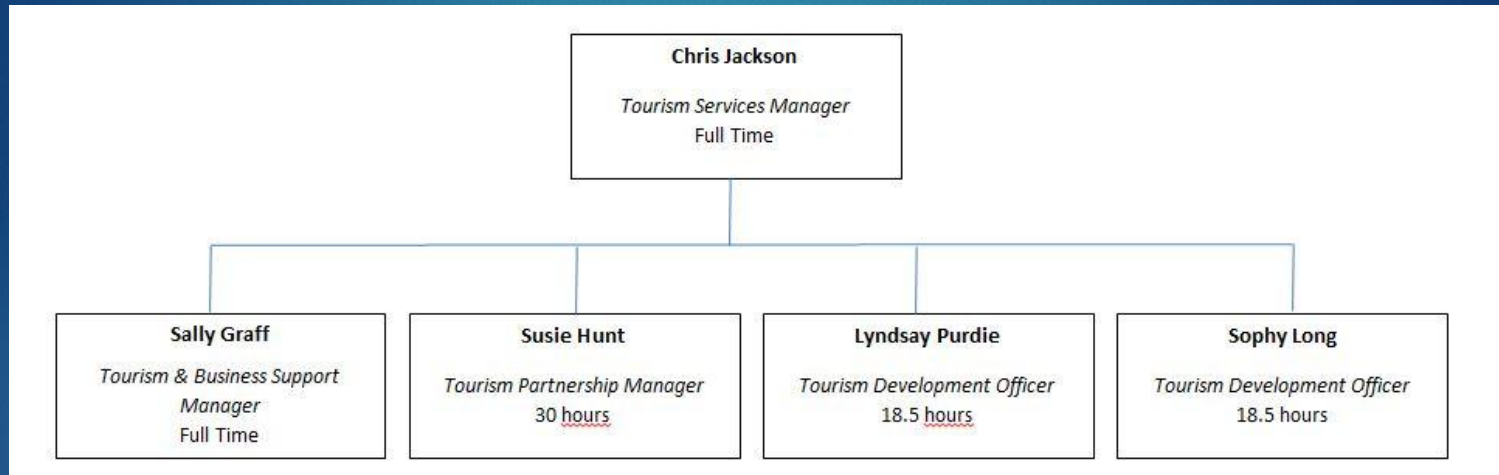
- ▶ **Overseas visitors**
  - ▶ Unlikely to reach 2019 levels until 2024
- ▶ **Limited operating capacity**
  - ▶ Most hospitality businesses operating at 50-70% capacity
  - ▶ Often shorter opening hours/appointment only
- ▶ **Increased costs**
  - ▶ Cleaning, table service not self-service, PPE
- ▶ **Fewer volunteers**
  - ▶ Generally older and more vulnerable to Covid-19

# Visitor Economy: On-going Challenges/Risks



- ▶ **Redundancies as furlough ends**
- ▶ **Insolvency threat for businesses especially**
  - ▶ If reliant on business, wedding or events markets
  - ▶ If reliant on overseas visitors
  - ▶ Sectors which still can't operate or operate easily
  - ▶ More seasonal businesses that missed a key part of their operating season
- ▶ **Changing visitor profiles and demographics**
- ▶ **Local sensibilities around incoming visitors**

# Shared Service: Team Resources



*Note: Tourism Digital Officer – 22 hours (vacant since March 2017)*

# Tourism Team Work 2020 / 21

- ▶ **Business recovery efforts** (see next slide: Contribution to Covid-19 recovery)
- ▶ **Market town support**
- ▶ **Marketing and promotion of the area**
- ▶ **Discover England Fund Project**
  - ▶ Project to spread visits geographically and seasonally
- ▶ **Business Engagement**
  - ▶ Networking and Local Connexion (business interaction)
  - ▶ Support local businesses
- ▶ **Training** – co-ordinate, best practice, case studies
- ▶ **Publications** – visitor guide, bedroom browser, town guides
- ▶ **Press and PR**
  - ▶ Media and film enquiries



# Contribution to Covid -19 Recovery

## ▶ **Stakeholder engagement**

- ▶ Free membership and individual contact ; 23 Sector led meetings
- ▶ Consumer newsletter to 48,000
- ▶ Guidance and best practice; Messages – ‘know before you go’
- ▶ Support to move online and to digital

## ▶ **Marketing and Promotion**

- ▶ Marketing skills and Networking / Business Communications
- ▶ Signposting to business support / advice / training

## ▶ **Reopening of town centres**

## ▶ **Pilot Project for Local Tour Operators and Accommodation Providers**

- ▶ ‘Experiences’ with local business – domestic packages
- ▶ Real Cotswolds - working with 5 towns across two authorities: Cirencester, Tetbury, Northleach, Witney and Woodstock

## ▶ **Targeting Overseas residents – particularly in London**

## ▶ **Local staycation market**

## ▶ **Digital Connectivity**