Revision Schedule

Stage One Report – Draft Technical Papers

Technical Paper No. 4b: Tourism

Rev	Date	Details	Prepared by	Reviewed by	Approved by
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1 Introduction

1.1 The Cotswold Water Park (CWP) has long been heralded as a resource of tremendous tourism, leisure, recreation and sport potential. Indeed, the Cotswold Water Park Report of 1969 pointed to evidence of a rapid growth in watersports in the Water Park area, with many lakes used for angling, sailing, hydroplaning, water skiing, rowing, motor boating, and canoeing, by clubs and for national and international meetings.

1.2 It is within this context that the opportunity for increased use of the lakes introduced by further gravel extraction was initially recognised. This sentiment has been repeated consistently through subsequent plans and strategy documents, with this premise now engrained within the latest published vision for the CWP as stated in the first line of the 2000-2006 Strategy:

> *"The CWP is and will continue to be a premier site for nature conservation, sports, recreation, leisure and tourism......"*

1.3 The purpose of the following report is to define the context of the CWP in terms of its position and potential in relation to tourism. Observations and analysis of the leisure, recreation and sport aspects of the CWP are detailed in Technical Report 4a: Leisure, Recreation and Sport.

1.4 Tourism is very much interwoven with these themes. The provision of leisure, recreation and sports facilities are all considered to be key drivers behind tourism visits within many destinations across the UK. However, during the course of the investigations it has become apparent that tourism requires more explicit commentary in order to address some specific issues that have been raised. This includes:

- examining the current context of tourism within the CWP;
- understanding the wider position of tourism for the CWP, and its ability to become a destination in its own right; and through this
- identifying the strategic fit and further potential for 'tourism-related' and 'tourism-driven' proposals being considered for the CWP

1.5 Therefore, tourism has been dealt with separately in the following Technical Paper. It is generally advised that this Paper be read in conjunction with all of Technical Papers to ensure that the reader understands the complexities of all the issues identified, however it is certainly recommended that this Technical Paper is read in conjunction Technical Paper 4a.

2 CWP Tourism Position Statement

2.1 The following provides an overview of the content and current context of the key tourism assets that exist within the CWP. This will include a review of:

- the key assets that exist as an asset for the tourism sector;
- the key themes that can be presented from a tourism perspective, building upon the assets to present a more defined experience for visitors; and
- the visitor accommodation within the CWP that specifically supports overnight visitors;

2.2 In addition, further analysis of the wider tourism product will be conducted to place the CWP within a broader context, both geographically and thematically.

Key Assets

Towns & Villages

2.3 The main towns within the CWP are Lechlade-on-Thames in the far north-eastern corner; Fairford directly to the west of Lechlade; and Cricklade in the central southern area. The main villages are South Cerney (which is arguably similar in size to Lechlade and Fairford) and Ashton Keynes, both in the west; whilst Down Ampney, a small village settlement, is fairly central to the CWP.

2.4 Lechlade and Cricklade are both small, attractive market towns located on the banks of the River Thames. Both towns have a 'heritage' setting, though their characters are very different. Lechlade is a town whose appeal is influenced by its proximity to the Cotswold AONB, with the architecture and stone used very much reminiscent of the flagship settlements of Stow-on-the-Wold and Bourton-on-the-Water for example. In contrast, Cricklade has a reputation as being "the most intact example of a late Saxon new town in Britain" - in fact, some of its remnants date back beyond this to the Roman era.

2.5 The heritage that comes with being a traditional market town is evident in both centres, with the open market square, such as in Lechlade, combining with low level high street shopping and some modest amenities (cafes, restaurants and pubs) to provide a coherent visitor offer within attractive and charismatic environments.

2.6 Fairford, also a market town, is an attractive ‘Cotswold‘ town in its own right. The main features of the town in relation to its high street character, its 15th Century Church, when combined with River Coln, to provide a distinctly ‘Cotswold’ town setting. The Church (St Mary's Parish Church) is famed for its 28 magnificent stained glass windows, believed to be the most complete set of surviving 15th Century stained glass windows in the UK. In addition, the town hosts a weekly fruit and vegetable market and the weekly the Fairford Country Market, with the latter showcasing fresh local produce, cakes and biscuits, preserves, and local arts and crafts.

2.7 Fairford also has a direct association with RAF Fairford, a military airbase established in 1944 and acted as a strategic base for British and American troop carriers and gliders for the D-Day invasion of Normandy. The base is currently classified as a 'standby airfield' and is also the only TransOceanic Abort Landing site for NASA's Space Shuttle in the UK. Although it doesn't have an accessible museum, it represents a significant visitor asset in that it is hosts the world's largest military air show, the Royal International Air Tattoo (see below). This single event provides a significant boost to the economy of the town and surrounding areas through the reputed 150,000 visitors it attracts during the two days of its duration in mid-July.

2.8 Although the remaining settlements/villages do not currently present significant tourism assets, they do add to the overall rural character and setting. This is centred on the villages providing 'quaint' and 'quintessential' places, supplemented by local pubs selling food and, in the case of South Cerney, Kempsford, Poole Kenynes and Maysey Hampton, offering limited accommodation.

The River Thames

2.9 The presence of the Thames provides an easily recognisable resource for tourism, leisure and recreation purposes.

2.10 The River Thames is already a well defined and easily identifiable visitor asset, benefiting from numerous riverside boat moorings; the Thames Path National Trail that run along its length; the various river cruises available at strategic points along its length; and the variety of places to eat and drink close to the rivers edge. In relation to the CWP, within which the upper reaches of the River Thames sits, it is recognised that such visitor-related activities are perhaps not as developed as elsewhere along the Thames, primarily because the river losses its navigation to motor boats beyond Lechalde. Cricklade also represents the furthest actual point of navigation on the River Thames for non-motorised craft and thus cannot attract pleasure craft for example.

2.11 However, the River Thames provides a significant and iconic landscape feature that can help prompt tourism trips, particularly day trips to the area – i.e. for walks, picnics, etc. In fact, the generally agreed source of the River Thames is located at Trewsbury Mead close to Kemble, marked by a stone marking with the inscription:

The Conservation of the River Thames
1857 -1974
This Stone was Placed Here to Mark the
Source of the River Thames

2.12 Moreover, the River Thames has influenced both the origin and subsequent development of both Lechlade and Cricklade, be it as a natural resource for early settlers; influencing the siting of transport networks as the Romans sought to avoid the flooded areas of the Thames on route to Cirencester; or in promoting growth in trade in later years through the movement of goods from Lechlade from the western areas, particularly once the Thames & Severn and North Wilts Canals were in operation. It is also the influence of the River Thames and its development overtime that has led to its gravel deposits now being utilised as a strategic zone for mineral extraction.

2.13 Therefore, it is arguable that the River Thames has had a significant impact on the current heritage of the CWP, and will continue to have a significant role in the future of the CWP. It is an integral asset that needs to be utilised to much greater affect than at present.

Keynes Country Park

2.14 Keynes Country Park, located in the western section of the CWP close to Ashton Keynes and South Cerney, is the primary visitor attraction within the CWP.

2.15 The Country Park consists of two lakes, with lake 32 being the main focus of casual activity whilst lake 31 is more specifically focussed on boating, with a range of rowing craft, pedals, and Katakana (double hulled canoe) available for rent at 'Go-By-Cycle'.

2.16 The primary attraction of the Country Park is the public access beach that has been established, presenting a distinctive family-based asset. This is supplemented by the purpose built children's play area.

2.17 Other facilities located at the Country Park include the following.

- The Millennium Centre, operated by the Cotswold Water Park Society, located at the entrance to the park. The Centre houses a small shop, the CWPS offices and meeting space in the Oak Hall which can be hired out to outside organisations. The capacity of the space is 50 delegates, and prices range from £40 per hour up to £200 for the whole day;
- Go-By-cycle, open Easter-October, is a cycling and non-motorised boat hire centre. This private business operates a lease contract with the CWPS for its facility in the Country Park. The cost of bike hire ranges from £4.00 for an adult bike for one hour to £20 for eight hours for a tandem and bikes are also available to buy. A delivery and collection service has been set up to cater for the growing second home communities, subject to a minimum one day rental. A diverse range of boats is available for hire including rowboats, shuttle bikes and Katakana (double hulled canoe);
- Water land Pursuits, which is an outdoor activity centre located at the main lake (No. 32) of Keynes Country Park. This centre is operated by a private company, who specialise in providing outdoor pursuits for young people and groups for team building. Tuition for a range of watersports is available and an annual membership is available for £120.00 for use of the lake and facilities at Water land; and
- 'Head-4-Heights', which is a private company specialising in aerial adventure. The site comprises seven high adventure activities (High Ropes Course) and numerous team challenge events (Low Ropes Course). The centre is open to the general public most weekends from 10am to 5.30pm and every day throughout the school summer, Easter and Half Term holidays. However, the establishment is also highly geared towards groups, and is accordingly marketed towards stag and hen groups, birthday parties, youth groups, companies and schools. Prices are per person, dependent on the user group and activity package. As a guide, birthday parties are £12.00-£17.00, stag and hen events £25.00-£29.50, school/youth groups £12.00-£27.00 and corporate programmes £17.00-£79.00.

2.18 The Country Park is open all year, with access times seasonally adjusted (October-March 9am-5pm; April-September 9am-7pm and May-August 9am-9pm). Admission fees to the Country Park are levied via the car park, though entrance is free in January and February. At other times, the charge is £4.00/£3.00 per adult and £0.50/£0.50 per child during weekends/weekdays June-September; £2.00/£1.00 per adult and £0.50/£0.50 per child April, May, September; and £1.00 per adult and free for children throughout March and October-December.

2.19 The visitor appeal of the Country Park is evident in the fact that it is estimated to attract up to 300,000 visits per annum (it is estimated that the average is around 200,000 visits per annum), even though no substantial promotion of the facility takes place. In fact, anecdotal evidence suggests that the Park can reach its capacity levels as early as 10-11am on a hot and sunny day in August. Although this demonstrates a high level of interest and visitor use of the Country Park, it also highlights a dependency the facility has on the weather - a factor endorsed by the high level of seasonality with approximately a half to two-thirds of visits coming from the nine-week period between June and September.

The Royal International Air Tattoo, RAF Fairford

2.20 The Royal International Air Tattoo is an event that is held annually at RAF Fairford over the third weekend in July.

2.21 Organised by the Royal Air Force Charitable Trust, the Tattoo is reputed to be the world's largest military air show, with 300+ aircraft participating each year and attracting upwards of 150,000 visitors.

2.22 During the weekend, visitors are witness to flying display from fast jets, giant transporters, historic aircraft, and the Red Arrows plus in 2007 there was a chance to view the USAF Thunderbirds, the USAF Air Demonstration Squadron.

2.23 This is undoubtedly a significant event, both from a regional perspective and within the context of military aviation interest.

Other Tourism Assets and Attractions

2.24 The majority of the remaining asset stock is primarily concerned with passive forms of non-fee charging recreational pursuits (e.g. walking and cycling) and active fee-charging sporting provision (e.g. sailing, water ski-in). These are discussed in more detail in Technical Paper x: Leisure, Sport and Recreation.

2.25 In relation to other visitor orientated assets, the main amenities are:

- **Neigh Bridge Country Park**, which neighbours Keynes Country Park in the west of the CWP. It is a much more modest facility in comparison, offering more of a secluded area for more informal activities such as picnicking, walking, children's play area, and lakeside walk. Angling is also available at Lake 56.
- **Butts Farm Rare Breeds and Shop**, the only fee-charging attraction that has been identified in the CWP. This facility is a family run farm that has diversified its practices to attract visitors. The farm has a dual visitor purpose in that:
    - it is open to the public with activities and hands-on experiences based upon the rare species of cattle, sheep, pigs, goats and poultry. The facility attracts some 10,000 visitors per year. It is open mid-February to September half term, with the admission charge set at £4.00 per adult and £3.00 per child; and
    - it contains a farm shop on site where visitors can purchase the produce of the farm.

- The **Cotswold Water Park Gateway Centre**, which opened in 2004. Located in the western section, close to the A419, the Gateway Centre has become the focal point for visitors arriving in the Park. The centre is designed to provide visitor information on the CWP and wider area, offering some interpretation of the CWP, its nature and its heritage. The Centre also has a café (Coots' Café) with views looking out over lake 86. In 2003, the original Cotswold Outdoor Store relocated to a site next door to the Gateway Centre, giving an additional motivation for visiting the Gateway Centre and the CWP as whole.
- **Cricklade Museum** is a small museum located in Cricklade town. Managed by the Cricklade Historical Society, the museum displays over 8,000 objects associated with Cricklade. The small-scale nature of the attraction is evidenced by the fact that it receives just 450 visits annually.
- The annual **Fairford Steam Rally**, held each year at Fairford Park, which can attract significant volumes of visits, albeit on a more local level of importance.

Wildlife/Nature Reserves

2.26 There is a strong correlation between wildlife and tourism, and one that has been a growing in strength in recent years thanks to a growing appreciation of nature and wildlife in the UK and the need to protect habitats for certain species, especially those identified as being in danger.

National Nature Reserves

2.27 The audit has revealed that the CWP has two Nature Reserves of special significance: North Meadow and Clattinger Farm.

2.28 Covering 108 acres to the north of Cricklade and managed by Natural England, North Meadow is said to be one of the finest examples of a lowland hay meadow in Europe. In particular, the reserve supports Britain's largest population of the Snake's head fritillary, a nationally scarce flower. The reserve is also protected as a Special Area of Conservation and Site of Special Scientific Interest.

2.29 Clattinger Farm, owned and managed by the Wiltshire Wildlife Trust is also a collection of hay meadows. As a recognised threatened type of grassland, located on the west boundary of the Water Park near to the Lower Mill Estate, the site is acclaimed as one of the finest remaining examples of enclosed lowland grassland in the UK. It has legal protection as a Site of Special Scientific Interest, and is also considered to be a candidate Special Area of Conservation which would bring it in line with North Meadow as an area of highly significant conservation value. The WWT put this in to words through simply explaining that 'When our great-grandparents were young, dairy farms all over the country would have looked like Clattinger Farm. Wildflowers blazed as far as the eye could see. Hedgerows and trees were loud with birdsong, and the skylark's song echoed from above'.

Other Nature Reserves

2.30 Altogether there are nine registered nature reserves contained within the CWP area.

2.31 From a visitor perspective, Coke's Pit (Cotswold Water Park Society), designated as a Local Nature Reserve in 2003, is the most established in terms of amenities. An important habitat for many waterfowl and wildlife species located to the east of Somerford Keynes near to Keynes Country Park, the site has visitor facilities in the form of interpretation boards and a bird hide, with parking available at Keynes Country Park. The Cotswold Water Park Society, which were given the site in 2002 after 40 years of gravel extraction, own and manage this reserve. The Society is also responsible for Shorncote Reed Bed, the first Water Park quarry to be restored solely for wildlife, demonstrating that nature conservation is a significant function of the CWPS.

2.32 Clattinger Farm represents just one of four neighbouring Trust reserves – Lower Moor Farm, Oaksey Moor Farm Meadow, Swillbrook Lakes being the other three – with which the WWT own and manage as nature reserves. With Lower Moor Farm including three lakes, two brooks, ponds and wetland; and Swillbrook Lakes including two lakes; the collective reserves are growing an increasing reputation as being one of the finest spots in the area for birdwatching. Moreover, the collective area of the four sites is being utilised by the WWT as a means of creating a microcosm of its primary objective to present whole landscape solutions to biodiversity. This essentially means that the sites are being developed to interlink with one another through by ancient hedges, woodland and meadows to encourage specie movement and growth.

2.33 Further to this, Gloucestershire Wildlife Trust's manage two reserves within the CWP, namely:

- Whelford Pools (GWT) - In addition to two main lakes there are three small pools favoured by dragonflies. Two hides have been constructed to observe the wintering wildfowl and breeding birds. The reserve is located near the village of Whelford, in the eastern section south of Fairford; and
- Edward Richardson & Phyllis Amey (GWT) - Located north of Lechlade, these shallow lakes are home to a rich variety of flora and fauna. There is a bird watching hide for observing wildfowl.

Key Tourism Themes

2.34 Tourism is increasingly becoming concerned with the delivery of experiences based on themes that have a resonance with visitors. The rationale for this approach is outlined further in section xx of this report. The principal themes that currently relate to the CWP are defined as follows.

Activities

2.35 The actual activities available within the CWP are explored in more detail in Technical Report 4a: Leisure, Recreation and Sport.

2.36 Activities are being increasingly utilised to present a distinctive package that can either individually or collectively drive visits to a destination. On the basis of the existing assets, the CWP can offer the following activity themes:

- Causal leisure and recreation – the CWP has a variety of leisure routes, including the Thames Path as a National Path with a high level of visitor use. Likewise, Sustrans Route 45 which bisects the CWP forms part of a steadily increasing network of predominantly cycle-based routes around the UK. At a more local level, the CWPS produce a leaflet with various walking and cycle routes around the CWP. Anecdotal evidence suggests that cycling is certainly a popular activity amongst visitors, with its low level and softly undulating land more conducive to this type of activity for the wider market.

- Formalised sports – the creation of lakes within the CWP has naturally led to the development of waterpsorts activities, principally based on sailing, water ski-ing and fishing. Although the audit revealed that a high proportion of these facilities are focussed on membership, there are still a number of facilities that can be seen as attracting visitors to the CWP for more structured participation whilst others do offer a more casual 'pay-and-play' option.
- Formalised activities – although some may argue that Paintball is a form of sport, there is still a more general perception of this being a formalised activity. Likewise, Head-4-Heights and

Heritage

2.37 The heritage of the CWP is outlined in Technical Report x: Heritage which accompanies the series of reports being produced for the CWP Master Planning process.

2.38 Although the Upper Thames Valley, of which the CWP is a core component, has a distinctive heritage and history that dates back to pre-historic times, the story currently lacks a degree of cohesion and coherence in terms of its presentation to visitors.

2.39 Nevertheless, there is a capacity within the CWP to develop the heritage offer further for the benefit of visitor interpretation and understanding.

2.40 Also, on the back of niche interest in archaeology, there the potential whilst mineral extraction continues for high level to amateur level excavation.

Family-Fun

2.41 The current assets and attractors of the CWP appear to either directly or indirectly have an affinity towards the family market. The most obvious assets in this respect are Keynes Country Park, Neigh Bridge Country Park and Butts Farm Rare Breeds & Shop.

2.42 However, the gentle nature of the leisure activities – i.e. cycling and walking – is also highly conducive to this market.

Visitor Accommodation

2.43 Accommodation stock for the CWP has been identified at three different levels: within the Designated boundary of the CWP; the Functional Boundary of the CWP; and in relation to the wider catchment.

2.44 The Designated boundaries relate to the actual parish boundaries of those participating and the slightly broader practical boundary of CWP activities, whilst the Functional Boundary is meant to provide a graphic representation of the broader scope of the CWP as a whole.

2.45 The wider catchment refers to a more subjective area that aims to represent the wider 'sphere of influence' for the CWP. This concept essentially denotes that visitors do not recognise any type of boundary when identifying a place to stay on a visit, but rather will seek accommodation that suits there needs best. Therefore, it is certainly likely that a visitor looking to spend an overnight stay directly motivated by a desire to visit the Cotswold Water Park could choose accommodation enterprise close to, but not strictly within the CWP itself. Further research would be needed to test this premise, but the arbitrary boundary has been set at a maximum of 20 minutes from the CWP designated boundary, and includes all of postcodes GL7 3, GL7 4, GL7 5, GL7 6, SN5 4, SN6 6, SN6 7, SN16 9 and SN26 8.

2.46 The main source of information on accommodation within and around the CWP has been gathered through the TRIPS (2005) database used by South West Tourism for recording accommodation stock in the region.

2.47 In order to ensure robustness, Scott Wilson has reviewed, revised and supplemented this data through further investigations by establishing the current relevance of the data. Whilst it has been beyond the scope of this study to check the details of all establishments, we believe the revised database offers the most comprehensive data regards the accommodation stock of the CWP area.

2.48 Please note that this assessment excludes accommodation stock both in Swindon and in Cirencester. This has been done to present a more accurate depiction of the tourism visits that can be directly attributed to the CWP. It is recognised that both Swindon and Cirencester will both have a particularly high concentration of accommodation stock, but the occupancy of facilities are much less likely to be attributed to the presence of the CWP, certainly in its current form.

Serviced Accommodation

2.49 Altogether, there are an estimated 31 serviced accommodation establishments in the Functional CWP providing a combined 910 bedspaces. The majority of establishments are Bed & Breakfast (B&B), Guest Houses and Inns (81%) however hotels account for the bulk of bedspaces (79%).

Table x.1

Serviced Accommodation Stock

Type	Number	No of Rooms	No of Bedspaces
Designated	24	416	841
Functional	7	34	69
Wider Catchment	45	398	775
Total	76	848	1685

Source: Scott Wilson, South West Tourism TRIPS

2.50 There are six hotel establishments, the largest now being the Four Pillars Hotel, which opened in August 2007. Previous to this, the Cricklade Hotel and Country Club (87 bedspaces) was the largest hotel in the area, followed by the New Inn Hotel in Lechlade and the Bull Hotel in Fairford (59 and 58 bedspaces respectively).

2.51 The opening of the Four Pillars has actually transformed the stock provision within the CWP considerably. In this single development, the provision of bedspaces within the Functional

CWP effectively doubled from 461 bedscapes to 910 bedspaces. Moreover, these bedspaces are being provided by a branded hotel company with a significant marketing capacity and which will seek to attract visits from across the UK, if not beyond.

2.52 As table x.1 demonstrates, there are a further 5 serviced establishments located beyond the Functional boundary. Much of this accommodation lies within the wider 'sphere of influence' boundary surrounding the CWP. Altogether, this wider 'sphere' represents an additional 775 serviced bedspaces to supplement the stock available within the CWP itself.

Self Catering Accommodation

2.53 In contrast to serviced accommodation stock, there appears to be a comparatively high number of self-catering establishments within the CWP itself with the majority (79%) of units located within the Designated boundary. Altogether, a total of 153 units have been identified, providing 883 (83%) bedspaces.

2.54 The concentration of self-catering units within the Designated CWP boundary is largely attributable to the availability of second home accommodation for self-catered holiday lets. This is exemplified by the fact that just over three-quarters (78%) of the self-catered units within the Designated boundary are located at The Watermark and Lower Mill Estate second home developments.

Table xx

Self-catering Accommodation Stock

Type	**Units**	**No of Bedspaces**
Designated	153	883
Functional	7	26
Wider Catchment	34	149
Total	194	1058

Source: Scott Wilson, South West Tourism TRIPS

2.55 The other self-catering units are predominantly single-unit, privately owned establishments. The exceptions to these are:

- Old Mill Cottages, Poole Keynes - 4 units;
- Netherwood Lakes, Somerford Keynes – 2 units; and
- Log House Holidays, Poole Keynes – 2 units.

2.56 The audit has revealed a further seven units in the Functional CWP area, and 34 units in the wider catchment.

Caravan and Camping

2.57 The caravan and camping product generally falls into two distinct categories; static units, and touring pitches.

2.58 The review of static unit provision in the CWP has revealed a total of 355 static caravans and 41 chalets within the Designated boundary. Hoburne Cotswold, near South Cerney, provides the majority of the stock (280 static caravan units and all of the 41 chalets) and is part of a chain of seven holiday parks predominantly located in the southwest. St John's Priory Park, a static caravan holiday park in Lechlade (also acts as a residential park), provides the rest of the stock.

2.59 It should be recognised that the majority of these static holiday homes are in private ownership, with just 11% of static caravan stock verified as being available to rent by general holidaymakers. This means that the remaining 89% are classified as owner used, though it is noted that use by the friends and family of the owner is permitted. Hoburne actually manage this to a certain degree through the issue of six permanent 'memberships' (allowing access to all the park's free facilities such as the swimming pools and club lounge) per caravan as an owner's entitlement, whilst further temporary cards can be issued at an extra charge.

Table xx

Camping and Caravanning Accommodation Stock

Type	Touring Pitches	Statics	Holiday Park Units	Holiday Park Bedspaces
Designated	240	355	41	112
Functional	27	0	0	0
Wider Catchment	30	0	0	0
Total	297	355	41	112

Source: Scott Wilson, South West Tourism TRIPS

2.60 Hoburne is also the largest single supplier of touring pitches (189) within the Designated CWP boundary. To reinforce this, the only other establishment at present to cater for touring camping and caravanning visitors is the Bridge House Campsite in Lechlade, but this only contributes a further 51 pitches. There is also very limited additional provision provided further a field, with just 57 pitches located in the wider 'sphere'. Moreover, six of the 11 campsites identified are defined as Caravan Club Certified Locations. By their very nature these sites are restricted to a maximum of five touring pitches.

2.61 The above analysis does not take into account any landowners that take advantage of the rule allowing them to open up a field for up to 28 days per year without the need for a license. Anecdotal evidence suggests that landowners especially exploit this rule during the Fairford International Air Show.

Second Homes

2.62 As has been previously identified, second homes are becoming a major feature within the CWP. The character, behaviour and value of second home owners are being highly debated at present. However, this type of visitation is generally classified as a means of 'tourism', an thus their expenditure is included within most tourism economic impact assessments, and Gloucestershire and Wiltshire are no exception.

2.63 The two main developments located within the CWP, The Watermark and Lower Mill Estate, are purpose built second home/holiday home complexes, set within attractive, secluded and exclusive environments. They are both highly rated in terms of the distinctive architecture of the homes themselves, with The Watermark offering 308 New England-style lodges over five individual and differently themed lakes; whilst the Lower Mill Estate offers 163 homes is reputedly *individually conceived and considered by the world's leading architects*.

2.64 Both second home developments have a distinctly upmarket appeal, and include high quality leisure facilities such as restaurants and bars, health clubs, children's play areas and leisure/sport provision (e.g. swimming pool, tennis and, in the case of Lower Mill Estate, spa facilities) as well as boating and fishing on the lakes themselves. The developments are fully managed and maintained with 24 hour security; landscaping and gardening; maintenance of sporting and leisure facilities; site management; and refuse collection and resort lighting.

Wider Tourism Destinations

2.65 Modern tourism does not operate in geographic isolation. Rather, the mobility of visitors means that the sphere of influence can often transcend a destination by some distance, particularly as the visitor does not generally recognise either administrative boundaries or boundaries concerning specific spatial designations (e.g. National Parks; AONBs). Therefore, the tourism position of the CWP needs to be considered within its wider setting.

2.66 Gloucestershire, Wiltshire and Oxfordshire are, from a tourism perspective, under the auspices of designated 'Destination Management Organisations' (DMOs). The following provides a brief overview as to the tourism offer of each of these.

Gloucestershire – The Cotswold & The Forest of Dean

2.67 The focus of the Gloucestershire DMO is defined within its title, i.e. The Cotswolds and the Forest of Dean. However, from the perspective of this study, it is suggested that the scope of the destination as a whole is more defined to highlight other assets, specifically Cirencester.

Cotswold Area of Outstanding Natural Beauty

2.68 The Cotswold Area of Outstanding Natural Beauty (AONB) is perhaps the closest visitor asset to the CWP, not only in terms of geography but also in relation to its character, with both the towns and villages of the CWP sharing similar architecture and ambience reminiscent of the Cotswold AONB.

2.69 This context is important to the CWP as the Cotswold AONB is recognised as being one of the most characteristic rural destinations in the UK. From a natural perspective, the AONB is typified by gently undulating limestone formations and contains nationally important rare limestone grassland habitats and ancient beechwoods that are rich in flora. The importance of the flora of the AONB is exemplified by the fact that some Cotswolds plants are so rare that they have specific legal protection under the Wildlife and Countryside Act 1981.

2.70 As important to its setting from a visitor's perspective is its attractive small towns and villages built from the underlying Cotswold oolitic limestone. The architecture provides a distinctive look and feel that is now inherently 'Cotswolds' in nature. Settlements such as Bourton-on-the-Water, Broadway, Burford, Chipping Norton, Cirencester, Moreton-in-Marsh, Stow-on-the-Wold and Winchcombe each typify this sentiment. It is these honey-stone market towns and villages represent the primary attraction, with retail and catering additional components of the overall experience that they provide.

2.71 Although the tourism experience relies heavily on these aspects, they are now presented in a more thematic context. The Cotswolds AONB is being increasingly targeted towards specific activity markets, for which walking and cycling are the most appropriate given its AONB status. The Cotswold Way represents the spine of the product, covering 100 miles between Bath and Chipping Campden. There are also many other walking and cycling routes that can be undertaken.

2.72 Other market themes identified within The Cotswolds include gardens and gardening, shopping, indulgence, eating and drinking and romantic breaks. By far the most significant of these appears to be 'Gardening' with the National Trust 'supergardens' to small private gardens for charity all open to the public, whilst garden events are regularly hosted.

2.73 There are a number of specific visitor attractions within the AONB, including family-based attractions (e.g. Bourton Model Railway, Cotswold Wildlife Park & Gardens), historic properties (e.g. Hailes Abbey, Tewkesbury Abbey, and Berkeley Castle), and museums and galleries (e.g. The Jack Russell Gallery, Cotswold Motoring Museum, Winchcombe Folk & Police Museum). These attractions provide an important element in relation to other 'things to do and see'.

2.74 The importance of the Cotswolds AONB to the visitor market of this area is reflected in the fact that wider areas of the Cotswold (and indeed other areas of Gloucestershire), North Wiltshire and West Oxfordshire use their inclusion within the 'Cotswolds AONB designation' within their own marketing material ('Oxfordshire Cotswolds', 'Think Cotswolds, think tranquil, think North Wilts' – Visit North Wiltshire). This does currently includes the CWP, with the wider CWP area included as a place to undertake sporting activities, visit an inland beach, and a place for nature watching; whilst Kelmscott Manor and Cotswold Woollen Weavers are mentioned as specific attractions associated with Lechalde.

Cirencester

2.75 Cirencester, close to the northern boundary of the CWP, is considered to be one of the primary gateways to the Cotswold AONB and is recognised as its largest town. However, it also represents an interesting settlement for discovery in its own right.

2.76 Cirencester is rich in history, having been firmly established during the Roman era, and with further marked developments and growth during the Saxon, Norman and Tudor periods. Each of these periods is still evidenced today, with the remains of the Roman amphitheatre and the

Cirencester Abbey now preserved, whilst the parish church of St John the Baptist is one of the largest parish churches in England. Built in the late 15th Century, the church is often referred to as the 'Cathedral of the Cotswolds' due its size.

2.77 As a complement to its heritage, the retail centre of Cirencester is growing a reputation for not just its branded stores, but also its smaller, independently owned stores. This is encouraging both economic exchange and repeat visits as people can enjoy a more fulfilling shopping experience but within an attractive and historical (more traditional) setting.

The Forest of Dean

2.78 The Forest of Dean is defined as one of the last remaining ancient forests in England, covering over 110 square kilometres of woodland between the rivers Wye and Severn.

2.79 The Forest is described as being one of the most distinctive areas of Britain, with stunning landscapes and spectacular scenery said to have inspired artists, craftspeople, inventors, poets and playwrights. However, from the context of the CWP in particular, the Forest of Dean is more overtly associated with being a place to experience 'the great outdoors'. In this respect, visitors are encouraged to experience:

- Rock-based adventure activities – rock climbing and pot-holing;
- Water-based sports – canoeing, kayaking and rafting on the River Wye, which has the potential for white-water;
- High-wire adventure – through the presence of Go-Ape! and Motiva; and
- more unusual activities such as Llama and Camel trekking, and bushcraft experiences.

2.80 This is in addition to general walking, cycling and horse-riding activities.

Wiltshire & Swindon

2.81 The Wiltshire and Swindon DMO draws upon a range of assets and attractors for the destination. Heritage is its primary theme, with assets ranging from the iconic Stonehenge, Salisbury and the Avebury Stone Circle, to the Kennet and Avon Canal, and its historic market towns such as Marlborough and Bradford on Avon.

2.82 Relative to the CWP, Swindon and North Wiltshire represent the two main sub-regional tourism destinations that have a direct and distinctive connection to the CWP.

Swindon

2.83 Swindon is a fairly modern and developing town. The Town is not considered an especially high profile visitor destination, particularly in relation to leisure visits, yet it has two of the more distinctive visitor assets of the wider CWP area, namely the Steam Railway Museum and the neighbouring McArthur Glen Swindon Designer Outlet Village. The significance of the latter is that it attracts approximately 3 million visitors per annum.

2.84 In addition, the 'Magic Roundabout' in the centre of the town provides an almost iconic symbol for the town.

2.85 More recently the business sector is proving to be a key driver behind the tourism activity of Swindon. The town is becoming the location for the head quarters of a number of high profile, multinational organisations such as Motorola and Honda. These organisations will attract business visitors, a factor that no doubt played a major part in the recent decision of Jurys Inn to begin the construction of a 200-room hotel in the town. The Jurys Inn will join De Vere, Marriott, Holiday Inn, Hilton, Thistle, Ibis, and Premier Travel Inn as branded hotels with a direct presence in Swindon, whilst Four Pillars has recently opened its largest operation in the CWP, close to the A419 and with easy access to Swindon.

North Wiltshire

2.86 As previously mentioned, North Wiltshire is part of The Cotswolds and therefore its assets are mainly associated with those of the AONB – i.e. attractive scenery and the distinctive character of the architecture and use of limestone.

2.87 Other assets within North Wiltshire are generally historic and heritage features, with the National Trust village of Lacock one of most untouched and unspoilt villages in the UK; Malmesbury’s Norman Abbey; architectural heritage features endowed by wealthy 'wool' merchants in the form Weavers' Cottages at Corsham; and Calne as a town whose origins are from the middle ages.

2.88 Calne is also revered as the gateway to the main natural asset identified by North Wiltshire, namely the open countryside of the Wiltshire Downs. The Downs represent an ideal walking, cycling and horse riding environment, with the White Horse at Cherhill, Oldbury Castle as an Iron Age hill fort, and the 19th Century Lansdowne monument presenting a the primary focal points.

Summary

2.89 The audit has revealed that, at present, the tourism offer in the CWP is comparatively modest, especially when placed in a wider context of the Cotswold AONB and its significant leisure-based product; Cirencester, as a gateway to the Cotswold AONB, but also a centre of heritage importance in its own right; and Swindon with its predominantly retail and business-orientated tourism product.

2.90 However, recent developments in accommodation (initially the second homes, but also now the Four Pillars Hotel) has bolstered the capacity of the CWP to attract more visitors to the area.

2.91 A key issue is in relation to how the wider product can be developed to raise the profile of the CWP, but in a manner that matches the character of the area, and provides a complimentary resource for the wider destinations of Gloucestershire, Wiltshire and even the South West and South East. The existing facilities are arguably geared towards a day visitor audience, but thanks to the growing accommodation base, it is likely that further product will be needed in order to deliver a fuller programme for those spending a few days or longer within the area.

2.92 The character of the villages, the River Thames and heritage are all important features that could be presented into a more inclusive package of ‘things to do and see’ in the area. However, the ‘experience’ drivers are likely to be based upon the leisure and sporting potential of the CWP. In this respect, the CWP has the potentially to offer a unique and distinctly different product when placed in a wider tourism context. Although walking and cycling appear to be the predominant activity in relation to many destinations, the lakes provide an opportunity to deliver something different that can pull on different emotional strings in relation to the visitor market.

2.93 The association between the CWP and the Cotswold AONB is particularly strong in the eastern section of the CWP through Lechlade and Fairford. A key issue is whether, from the perspective of the visitor, the association is appropriate to the wider offer of the CWP, or whether the CWP could become a destination in its own.

3 Market Considerations

3.1 Having defined the current profile of tourism in the CWP, it is necessary to place this within the context of the market and market trends. The following provides a synopsis of the key trends facing tourism in general market terms and in relation to specific market themes, and then seeks to place this within the context of the CWP.

Top-Level Visitor Trends

Domestic Trends

3.2 Tourism is an ever-evolving industry. Improved personal wealth, pressures on the work-life balance, increased mobility, and the sophistication of packaging and marketing are shifting consumer aspirations and expectations in terms of holiday destinations.

3.3 The key trends in tourism between 1993 and 2005 include [please note CAGR is the compound annual growth rate]:

- growth in the level of long holiday trips taken abroad by the UK population, and an ever widening choice in overseas destinations;
- a consistent growth in the number of short break domestic trips (7.1% CAGR), whilst the proportion of long holidays has remained virtually static;
- a rise in visitor expenditure (5.1% CAGR), driven by short breaks (10.7% CAGR);
- a fall in the average visitor nights from 4 to 3 nights, as a consequence of the increase in short break trips;
- a rise in the proportion of holidays specifically to pursue an activity (1.8% CAGR up to 2003), driven solely by short breaks; and
- a rise in the proportion of activities undertaken whilst on a holiday in the UK (5.6% CAGR).

3.4 As a general rule, it is expected that these trends will continue over time, with even long haul destinations now becoming more affordable and easier to plan. As a result, short breaks and second holidays are likely to become the predominant type of trip taken in the UK by the domestic market.

3.5 However, the fact that the UK-based breaks are being increasingly motivated by activity participation or special interest visits (i.e. experience-driven) present new opportunities for UK destinations.

Overseas Visitor Trends

3.6 According to the International Passenger Survey, overseas visitor numbers have risen slowly between 1999 and 2005. This rise has, however, not run smoothly over the course of this period, with major events such as the terrorist attack on the world trade centre; the foot and mouth outbreak; the Iraq and Afghanistan War; and the London Bombings in 2005; each noted to have had a negative affect on international travel. Nevertheless, the resilience of the overseas market has been good, and the number of visitor arrivals reached an all-time peak in 2005, with early indications suggesting that this has continued through 2006 and into 2007.

3.7 Table xx demonstrates that the main growth has come from those visiting friends and relatives (7.5% CAGR), with business related trips being steady and holiday trips growing at a very modest pace since 1999.

Table xx						
Changes in Overseas Visitors to the UK						
	Trips (000's)			Spend (£m)		
	1999	2005	CAGR	1999	2005	CAGR
Holiday	9,826	9,713	-0.2%	£4,251.0	£4,516.0	1.0%
Business	7,044	8,168	2.5%	£3,967.0	£4,055.0	0.4%
VFR	5,640	8,687	7.5%	£2,133.0	£3,218.0	7.1%
Other	2,884	3,401	2.8%	£2,148.0	£2,412.0	2.0%
Total	25,394	29,970	2.8%	£12,499.0	£14,248.0	2.2%
Source: IPS						

3.8 In terms of origin of visitors, Europe remains the predominant source of overseas visitors to the UK (21.6 million visits in 2005). Moreover, through growth areas such as Poland, Czech Republic and Hungary, visitor levels from Europe still show signs of growth (6.7% CAGR between 1999 and 2005).

3.9 Long haul countries such as India (9.5% CAGR between 2001 and 2005), New Zealand (8.6 % CAGR), mainland China (8.4% CAGR), and Australia (7.3% CAGR) now present much stronger markets for the UK than in the past. The growth of India and China as markets is on the back of considerable economic growth that has allowed the aspiration of travel to become a reality for more people. These markets are helping to offset markets that have slowed in recent years, with North America currently static in terms of visitor numbers to the UK and a fall in visitor numbers from Japan (-2.4% CAGR between 2001 and 2005). The significance of this is that these two markets are traditionally the most prosperous for the UK.

3.10 The more successful UK destinations in terms of attracting overseas visitors are typically those that have international access hubs (international airports and international ports); have a city of ‘world status’ (London, Manchester, Edinburgh); contain world heritage sites (Stonehenge, Hadrian’s Wall, Bath); contain iconic symbols or buildings that help define an area (London Eye, The Eden Project); or offer National Parks with prominence on a world scale (Lake Districts, Peak District).

3.11 Whilst most regions have areas or pockets of interest that could be described as having a ‘world’ audience, the majority of the country is still relatively unexplored by overseas visitors. Work is being done to promote the regions of England in terms of international marketing (VisitBritain) and from the main access points in an attempt to disperse overseas tourists further a-field.

3.12 However, there is still a tendency for overseas visitors on a leisure holiday visit to gravitate towards those sites that offer a glimpse into the contemporary British culture and its main sites of heritage and history. In this respect, Wiltshire does have a good advantage in that Stonehenge is considered an iconic symbol of Britain to an international audience, whilst the Cotswold AONB is improving its reputation for presenting some of the most attractive and unspoilt natural and built heritage in the UK.

Regional Context

3.13 The current designation of the CWP is predominantly within the South West region, though it should be acknowledged here that the eastern corner of the CWP abuts Oxfordshire, and thus could equally have a role to play in the South East in the future.

3.14 Both the South West (23.4 million overnight trips in 2005) and South East (22.3 million overnight trips in 2005) regions are premier tourism destinations in the UK. The South West is especially strong in relation to domestic visits (21.2 million domestic tourism trips in 2005), whilst the South East has a higher proportion of international trips (4.4 million international trips in 2005).

3.15 In relation to both regions, tourism trips are predominantly leisure holidays in nature. In the South West, trips are particularly geared towards the coastal offer, with over 60% of nights spent in the region are concentrated in Devon and Cornwall, and approximately 40% of trips are defined by visitors as being seaside-based. The split between destinations and types of trip is more even in the South East, but seaside trips still account for a quarter of all trips (24%).

3.16 Reflecting the growing trend for experience-driven holidays and short break, both regions are increasing their marketing (and development) on promoting particular activities or themes in order to inspire visits and/or match expectations of niche markets. Tourism themes that are consistent across both regions include:

- nature-based tourism - walking, cycling, wildlife attractions and other wilderness-based activities, such as fishing, horseriding and birdwatching;
- heritage orientated trips - with sightseeing of specific historical attractions, assets, towns and villages promoted;
- trips geared towards romantic escapes - based upon offering elegant country house hotels, boutique hotels, hideaway cottages and other special places to stay, with options concerning particular needs (e.g. room with a view, spa, restaurant, open fire) to ensure that the experience matches expectations; and
- trips that promise relaxation and pampering - spa breaks, countryside retreats, and narrow boating on canals.

3.17 The CWP itself is mentioned with South West Tourism's 'Nature' brand cluster as a place to enjoy fishing, with an invitation for visitors to try their hand at 'fly fishing in peaceful surroundings or coarse fishing with easy catch lakes for younger visitors'.

Current Visitor Performance

3.18 In the absence of specific visitor information for the CWP, it is necessary to review the most applicable data that could identify visitors and their behaviours. In this instance, this data relates to county level tourism statistics.

Market Composition

Overnight Visitors

3.19 Table xx provides the visitor volume and value figures for 2004.

Table x

	Domestic			Overseas		
	Trips (millions)	Nights (millions)	Spend (£millions)	Trips (millions)	Nights (millions)	Spend (£millions)
Gloucestershire	1.7	4.2	253	0.27	1.65	98
Wiltshire	1.6	3.9	240	0.28	1.68	70
Oxon	1.5	3.3	261	0.59	4.59	211

Source: UKTS, IPS

3.20 All of the counties are able to attract similar proportions of visitors from the domestic visitors, who generally spend less than 2.5 nights within the destination. Likewise, the spend per night for Gloucestershire and Wiltshire are similar at around £60 per night per, though for Oxfordshire this is significantly higher at £79 per night.

3.21 In stark contrast to the domestic situation, Oxfordshire is able to attract almost double the number of overseas trips when compared to Gloucestershire and Wiltshire. This is likely to be driven by the City of Oxford as a destination that contains its ancient and world-renowned university, and distinctive architecture. Moreover, the duration of trip is also longer at nearly 8 nights spent in Oxfordshire compared to 6 for Gloucestershire and Wiltshire. As a result, Oxfordshire receives nearly double the amount of income from overseas visitors compared to Gloucestershire, and nearly three times that of Wiltshire.

Day Visitors

Catchment

3.22 20 million people estimated within a 2-hour drivetime

Market Profile

3.23 In an ideal situation, it is recommended that the profile of visitors is based on locally obtained visitor information in relation to trip duration and spend per trip, defined by accommodation type. However, this is not available for CWP at a local level.

3.24 The most up-to-date research that has been undertaken that helps profile visitors is the Wiltshire Visitor Survey 2005. The key findings of this study are as follows.

- Overall:
  - Nearly two-thirds of those surveyed (65%) were staying visitors in the County. [Please note that this is unlikely to be representative of the situation as a whole, with South West Tourism estimating that the County received 14.7 million tourism day trips in 2001]
  - The average party of visitors consisted of 2.8 people, with a quarter (24%) of visitors being children under 16 years of age.
  - Well over half (58%) of visitors were in the ABC1 socio-economic groups. This compares favourably with the population as a whole with 43% of the general UK population falling within this category.
  - The average visitor to Wiltshire spent a total of £21.39 per day on non-accommodation items. A third (34%) of this was on food and drink.
- Day Visitors:
  - Nearly eight in every 10 (78%) day visitors were from the South West (excluding Wiltshire). A further 1 in 10 (9%) were from London or the South East. It is estimated that the average day visitor travelled 29 miles to their destination.
  - On the whole, the majority of day visitors had been to Wiltshire before.
  - The average day visitor spent £15.94 on their trip. This was comprised of a quarter of spend (£4.30) going food and drink, but just 6% on entertainment and leisure.
- Overnight Visitors:
  - Interestingly, well over a quarter (27%) of staying visitors to Wiltshire were from overseas, with this group a larger contributor than any of the individual regions in the UK (i.e. London / South East - 21%; North of England - 11%; South West - 9%). The methodology for this survey is unclear, but this result may point to the high level of appeal and awareness that Stonehenge and Salisbury have, with certainly the former an iconic attraction for the UK as a whole.
  - The average duration of overnight trips as a whole was 12 nights, of which seven nights were defined as being spent in Wiltshire. This suggests that Wiltshire is a significant focus for the holiday in question, with more than half of the nights being spent in the County.
  - The proportion of staying visitors on a leisure main holiday (28%), on an additional leisure holiday (27%) or on a leisure short break (24%) is roughly equal. A further 8% of staying visitors were found to be on business.
  - A significant proportion (39%) of overnight visitors were on their first visit to Wiltshire.
  - The reason for visiting Wiltshire was found to be highly influenced by its scenery, countryside and natural history (56%); its cultural, literary, and built heritage (50%)

and by specific visitor attractions (49%). Previous experience (38%) and accessibility (35%) also feature strongly in its appeal.

- Shopping (59%), a visit to a specific attraction or feature of interest (56%), or a place of wildlife/natural history (55%) all feature strongly as things people do once within Wiltshire. Walking (46%), visiting a museum (45%) and enjoying the local nightlife (44%) also feature highly in visitors repertoire of things to do and see, but less so in relation to watersports (2%) and golf (1%). Cycling featured as an activity undertaken by 11% of the survey respondents.
- Staying visitors were found to have spent an average of £39.21 per person per day. Two-fifths (40%) of this was given to accommodation (per person per night), and one-fifth (22%) on food and drink. Spend on entertainment equated to 9% of spend.

3.25 Although the context of this research is fairly broad, there are indications that developing a coherent tourism product in the CWP could have a strategic fit in relation to fulfilling and matching certain aims, objectives and existing product gaps in relation to the Wiltshire Tourism offer. Certainly the CWP could build upon the attraction that the natural environment and wildlife already evident within the County, but it could also be utilised to build a more defined product for watersports for example.

Trends in Key Markets for the CWP

3.26 Compared with the past, there has been a marked shift in the types of trips being sought by visitors in the UK. The availability of a good quality offer and one that offers value for money is always critically important, but the trip itself is increasingly being motivated by the desire to take part in an experience.

3.27 The experiences that could have a strategic fit with the CWP and its emerging offer are highlighted below.

3.28 A key aspect of the tourism sector to emphasis is that achieving consistently high standards in service delivery across all aspects of the tourism sector is vital in ensuring repeat and recommended visits, with visitors now more able to arbitrarily measure the quality of their experiences against different destinations.

Family Market

3.29 The family market already provides a principal market for the CWP, both through the presence of the Keynes Country Park which has a distinct family focus, and also through the 'second homes'.

3.30 According to research undertaken by Mintel, families remain a significant market for domestic tourism and will remain so in the future. Whilst the actual proportion of family-based trips is expected to fall, mainly due to changing demographics, an overall increase in wealth in the population means that family spending no holidays and trips is still set to increase.

3.31 Despite the growth in popularity of overseas holidays, it is estimated that 6 in every 10 families still take a domestic break. Moreover, compared to UK holidays as a whole, family trips are likely to be longer - four or more nights (Mintel Family Holidays UK Report June 2004). Families are also an important contributor to secondary spend, with families more likely to take advantage of attractions and purchases of food and drink.

3.32 However, it is generally accepted that the traditional family market has changed. As with other types of holiday trips and short breaks, the emphasis for families is seeking experiences that are on the one-hand family-friendly and safe, whilst on the other hand being entertaining, active and fun to ensure that satisfy their children's needs more often than not. In fact, according to Mintel, the affect of children is that under-16s have more influence on their parents' choice of holiday than any other major family purchase. According to the respondents surveyed:

- nearly a third (31%) said that 'factors connected with needs of the children' were part of deciding where to go on a long holiday,
- 14% admitted that the personal preferences of the child affected the decision; and
- information and ideas from children were part of 17% of holiday decisions.

3.33 However, there is a seeming gap in the UK market between expectations and the product, with a recent survey conducted by the Mother & Baby magazine denoting that families feel their holidays in the UK is not particularly family-friendly. Nearly two-thirds (62%) stated that Britain is not family friendly and over half (55%) think Britain is anti-child.

3.34 An exception to this is in relation to 'holiday parks', with 83% of parents denoting self-catering as being easier with children, and mobile homes being the favourite accommodation, probably due to the level of on-site facilities. Families enjoy beach holidays, holiday parks and villages and to a lesser extent holiday cottages, with Butlins, Pontins, Warner, Haven Parks, Oasis and Center Parcs all popular choices. The popularity of Centre Parcs for this market is well recognised, with the occupancy rates exceeding 90% for the enterprise that prides itself on offering a family friendly environment. The benefit of Centre Parcs is that all facilities are available onsite (including leisure, entertainment, and catering), with the provision of a decent sized room, en-suite facilities, good food, and a clean, welcoming environment the basic requirements for families.

3.35 Overall, it is likely that the family market will continue to be a key market for the UK, particularly as other pressures on the market place a burden on overseas travel - environmental concerns, the global threat of terrorism, and the potential increase in fuel duty charges for low cost airlines. VisitBritain has identified the key requirements for the market as being offering:

- value for money, a critical factor for all families regardless of income, as prices can add up quickly for a family of four or five;
- activities and entertainment that are designed to cater for children and adults, with seaside, holiday villages and Center Parcs, generally excelling in this type of offer;
- family-friendly facilities such as baby-changing rooms, high chairs, playgrounds, children's menus and child-friendly pubs and restaurants are also taken into account when going on holiday;
- attractive accommodation is essential and self-catering facilities are usually preferred as they offer flexibility;

- ‘easy travel’ options, generally by car to the destination, though not always around the destination if other transport means are accessible; and
- wet weather facilities and activities that can provide things to do during periods of inclement weather.

Attractions Market

3.36 According to the 2005 Visitor Attractions Survey, the visitor numbers to attractions is fairly stagnant overall with no significant difference in average attendance levels recorded from 2004. However, this broad statement belies some significant changes in attractions by type, with:

- visits to country parks (+7%) and farms (+5%) up from 2004, with a general feeling that they are continuing to recover after their sharp decline in 2001 which was largely attributed to the effects of the foot and mouth outbreak;
- visits to wildlife attractions/zoos also increased by +5% in 2005, representing another upturn in the fortunes for this sector after several unsettled years; and
- visits to gardens were up by +8% in 2005, largely attributed to the decent weather.

3.37 Of particular relevance to the CWP is that visits to rural attractions continued a recent upward trend in visitor numbers (increasing by +4% in 2005). This was driven by increases in visits to farms, country parks and gardens. One note of caution, however, is that trips to these types of attraction are largely weather dependent. Although it is too early to place any significance on the effect of the heavy rainfall in 2007 on attractions, it is certainly possible that some of these facilities will have experienced a downturn in attendance numbers as a result.

3.38 This highlights one of the key factors that need to be taken into consideration when developing a visitor attraction in the UK, i.e. the weather and the extremities that it can present. Good weather conditions are certainly conducive for predominately outdoor-based attractions, whilst poor weather will assist indoor attractions. However, any business needs to be able to attract markets outside of normally high periods of trade to maintain its success (and cash flow). This can be a challenge for attractions that have a reliance on either fair-weather or wet-weather conditions.

Activity Market

3.39 In 2003, 37.8 million domestic holiday trips in the UK were made specifically related to an activity (i.e. the activity was the main reason for the trip), up from 14 million in 1997.

3.40 The broad definition of activities includes a full range of activities, from shopping; visiting attractions; participation in walking and cycling; participation in water sports; fishing; and other informal and formal recreational activities.

3.41 The characteristics of the market are not easy to classify due to the different levels of activities and interests included in the definition. For example:

- those involving adventure activities (surfing, climbing, caving, pot holing, scuba diving) tend to be younger, spend less per night, are taken on an independent basis, and are more likely to stay in low cost accommodation; and

- those involving sports such as sailing, riding and golf are more likely to be AB social class, with higher levels of disposable income and a higher propensity to stay in higher cost accommodation (possibly with the activity on site, especially in the case of golf).

3.42 In addition, whilst activity and special interest based holidays tend to involve shorter stays at a destination (1-3 nights), the market also tends to be slightly higher spending compared to longer visits. This is a result of the markets' desire to undertake an interest in which they know they will have a great experience, but also the realisation that this activity needs to be undertaken within a condensed time period.

3.43 There is still a positive outlook for activity-based holidays, with people becoming less interested in purely sun related holidays and more interested in pursuing activities as part of an ever growing portfolio of interests.

Walking

3.44 Walking is the main activity undertaken by visitors whilst at a destination, either as a prime motivation behind a trip (5% in 2003) or as an activity undertaken once at a destination (71%). Moreover, due to its popularity walking is a relatively lucrative sector in terms of overall spend with an estimated 527 million walking trips made annually to the countryside across the UK generating £6.14 billion in associated spend (Ramblers Association).

3.45 The key to having a successful walking product is the availability of easily navigable routes, provided through a combination of maps and waymarking. A further requirement of walking routes is to ensure that it includes sites of interest, such as from a scenic or heritage perspective, respective interpretation of these sites and other features of interest, and suitable refreshment points.

3.46 A 'walkers welcome' scheme, operated by Visit Britain, is a popular way for tourism businesses to tap directly into the market. Accommodation providers, in particularly, have taken to using this scheme, and offer 'walker friendly' accommodation.

3.47 To act as a guide, any serviced operator seeking to become a 'Walkers Welcome' establishment must make specific allowances for:

- drying outdoor clothing and footwear, so clothes can dry overnight;
- hot and cold drinks making;
- evening meals available (if no eating facilities on site) within one mile;
- early or packed breakfast available if notified the night before;
- packed lunch to be available (an extra charge may be made). Flask top-up service available;
- the provision of maps and books on walking in the area/details of local and regional walking routes; and
- details of nearest doctor, dentist, hospital, and all night chemist and vets (if pet accepted).

Cycling

3.48 As identified in Technical Report 4a, cycling as an activity is growing in popularity across a broad range of groups. This popularity has transcended to tourism, with approximately 1% of all tourism trips in the UK being driven by cycling, and 7% involve some form of cycling once at the destination.

3.49 As a result of this, destinations are increasingly seeking to improve their cycling offer. According to thecyclepeople.com, the Lake District, Peak District, Yorkshire Dales, Cotswolds, New Forest, Exmoor, Northumberland, Norfolk, Cambridgeshire and Isle of Wight offer some of the best opportunities for cycling in the UK. As a joint initiative with 'Walkers Welcome', VisitBritain also has a 'Cyclists Welcome' scheme in operation. Specific considerations for operators looking to exploit this opportunity include:

- secure overnight storage;
- access to water point for washing bicycles and outdoor clothing;
- emergency bike repair capabilities, with suggested equipment including tyre levers, puncture repair kit, lubricant, and an air pump capable of being used for different valves; and
- details of nearest cycle hire outlets and cycle repair/spares shops available, as appropriate.

3.50 The destinations listed above all have 'Cyclists Welcome' accommodation establishments advertised.

3.51 The New Forest, as a destination with relatively gentle undulations, is particularly targeting this market. Its hop on and off bus service around the National Park which carries bikes via a cycle trailer is testament to this desire. The service has been designed to ensure that people are encouraged to leave their car behind, and explore the wider Forest area, via a bike. This forms part of its strategy to reduce the carbon footprint and impacts of visitors to the New Forest.

Outdoor Adventure

3.52 Outdoor adventure generally refers to those activities that require some form of specialist equipment and/or training prior to participation. This can include mountain biking as a sub-sector of cycling, and hill walking as a sub-sector of the walking market.

3.53 According to research into the adventure holiday market, it is estimated that at least 10% of UK holidays currently involve some form of participation in adventure activities, and adventure holidays now account for something like 4% of all domestic holidays taken in the UK.

3.54 A detailed analysis of UKTS data for UK visitor participation in adventure activities in Wales using 2002 data showed that:

- adventure tourists tend to spend less than the average per head than the average for all domestic holiday visitors (£36 per night for adventure tourists, compared to £42 for all holiday visitors in 2000). This is likely to be due to the greater propensity that adventure tourists have for using low-cost accommodation.

- adventure tourists generally spend a similar amount of time on holiday as all domestic holiday visitors, although the average length of stay for those engaging in watersports is slightly longer.
- adventure tourists seeking watersports are much more seasonal than holidays in general, with a sharp summer peak. This contrasts to other adrenaline sports which are much less seasonally peaked, with an above average proportion of winter visits.
- The age profile of adventure tourists is much younger than for all holiday visitors. The 16-34 age group accounts for 55-60% of holiday trips for most adventure activities (compared to 37% for all holidays). The 35-55 age group does, however, participate in adventure activities, and there is evidence of growth in the over 50s market.
- The majority of UK adventure holidays are taken on an independent basis, rather than a packaged basis.
- Independent participation in adventure activities tends to be by individuals and small groups of (usually male) friends. Couples also participate, and the family market can be significant for some activities.
- Adventure holiday takers are more likely to stay in commercial accommodation than UK holiday visitors in general, with camping used significantly more by adventure holiday takers than other types of holiday visitor.

3.55 Overall, a key advantage of adventure tourism, certainly in inland areas, is that it can contribute to extending the season, and to attracting winter visits. Moreover, it can be a means by which new areas can be opened up for tourism purposes.

Watersports

3.56 Water-based sports have had a long association with tourism, with the ability to participate in sailing especially being a significant motivational factor for encouraging visits to significant water-bodies. This is particularly true amongst the more upmarket sectors for sailing, as a potentially costly sport to participate in.

3.57 Sailing, certainly at the adventurous end of the market, is perhaps more associated with coastal regions of the UK. However, utilisation of inland water-bodies for sports tourism is becoming increasingly popular, and can be used as a means of encouraging initial participation and skill development. Moreover, if the water-body is significant enough in terms of mass, they may also have the potential to act as key drivers of visits. This concept is certainly observed at Rutland Water, where the mass of water is considered sufficient to deliver opportunities for watersports from cruising to training and racing in the confines of relatively safe and clean waters.

3.58 Likewise, education-based outdoor activity centres have had a long tradition of featuring watersports within their programme of activities. Due to increased safety requirements, the provision of safe and secure facilities that are not subject to the vagaries of off-shore currents, swells and tidal changes are regarded as a benefit for certain watersports at entry and skills development levels. This includes kayaking, sailing, and windsurfing, all of which can be done at the coast or on inland waters.

Golf

3.59 Golf is another sporting activity that has a close association with tourism, with specific golfing breaks now a commonplace package in the UK. Although golf is not considered a primary product of the CWP, the consultation process suggests that there could be an increasing demand for this type of activity on the back of the recent and proposed accommodation developments.

3.60 The packaging of golf clubs with other leisure activities is becoming increasingly popular. The association of golf with hotels, for example, has long been recognised. It is also common for clubs that don't have accommodation capacity on site to team up with local accommodation providers to present a complete short-break offer.

3.61 These are now promoted through dedicated and targeted promotional campaigns seeking to exploit the popularity of the sport, with estimates of 2.4 million regular golf players in the UK, increasing to 6.3 million across Europe (Golf Research Group, 1999). Such promotion includes VisitEngland's website which directs visitors interested in golf in the UK to golfbreaks.com. Examples of such breaks include a 2-day break at the Manor House at Castle Combe, inclusive of 1 night's dinner, bed & breakfast at The Manor House at Castle Combe and unlimited golf; and a 2-day break at the Gloucester Ramada Hotel and Resort, inclusive of 1 night's dinner, bed & breakfast and 2 rounds of golf.

3.62 It is interesting to note that the golf holes considered amongst the most challenging are those surrounded by water. For example, the TPC Sawgrass, a well-known golf course in Ponte Vedra Beach, Florida, has a signature hole known simply as the "Island Green". Although it measures only 132 yards from tee to green, it is said that this hole has been known to scare even top professional golfers. This is because it consists of nothing but an undulating, 78-foot-long green and a tiny bunker in front of it, surrounded by water on all sides. As in any sport, this type of challenge has a distinct appeal to many golfers.

Fishing

3.63 According to the Environment Agency, in England and Wales, each year 2.6 million people aged over 12 in England and Wales go fishing in freshwaters. Furthermore, it is estimated that about as many people would like to try the sport, or would return to angling if it were easier for them to access. It is an activity that attracts a very wide range of socio-economic groups, and it is a favoured sport amongst people with disabilities.

3.64 According to research conducted by the Environment Agency, fishing as an activity is estimated to generate £2.75 billion per year, and supports 20,000 people either full time or part time. Much of this spend comes from the purchase of equipment (rods, tackle, etc) but also incorporates travel and spend on breaks and holidays specifically for fishing.

3.65 Overall, the ability to access good sites for fishing can be a significant motivator for visiting a destination. Therefore, this presents a genuine visitor market for the CWP. Considering the volume of interest, the wide socio-economic appeal, and the commercial value associated with fishing as an activity, it is perhaps worth considering how the existing assets for fishing in CWP can be packaged better to suit the needs of visitors as well as the local market, especially as the CWP already features on the South West Tourism website as a destination that has a good synergy with this type of activity.

Nature & Wildlife

3.66 As previously suggested, wildlife and nature based tourism is growing in popularity. Moreover, the market potential has a distinct synergy with the ambitions of certain organisations to develop their interests in the CWP.

3.67 As an example of this growing interest in the UK, Scotland now has a clearly defined wildlife tourism market within the 'Highlands and Islands'. The research conducted into this market niche identified three core activities under the wildlife banner:

- visiting bird and animal sanctuaries – visits to established nature reserves and/or managed wildlife centres;
- bird watching – the identification and study of birds within their natural habitats;
- watching marine wildlife – including the watching and studying of seabirds, seals, cetaceans, and other water-based wildlife

3.68 A visitor survey on this market in the Highlands and Islands area revealed that wildlife tourists are:

- slightly more likely to be male (56%);
- predominantly aged over 34 (83%); and
- from the ABC1 socio-economic grouping (68%).

3.69 Whilst wildlife may be the main motivation behind a visit, these visitors were also prone to undertake other activities such as visiting heritage attractions, walking/rambling or visiting archaeological sites.

3.70 Overall, the report expects the market to continue to grow, with evidence provided by a MORI survey suggesting that Birdwatching is the fastest growing outdoor pastime in the world with over two million birdwatchers in the UK alone.

3.71 With consumer interest forecast to grow in this sector, this niche certainly presents an opportunity for the CWP through its association with the lakes and the appropriate habitat development that could present a unique opportunity to encourage greater numbers of endangered specie, particularly the Bittern. The benefit of this type of development from a tourism perspective is that it has a year-round occurrence, with different seasons being the trigger for particular events or happenings, such as in and out migration of different species of birds for example. Therefore, nature tourism could help to extend the benefits of tourism beyond the more traditional summer months.

3.72 There is also a large educational role for nature tourism, with school interest in nature ever present with courses such as biology and environmental studies being present within the curricular of key stages, GCSE, A Level and degree courses.

Indulgence/Pampering

3.73 Although indulgence/pampering do not feature highly within the current tourism offer of the CWP, it is well known that this type of offer is being sought more and more at a destination level as a means of attracting greater numbers of trips. To act as an example of this, the Four Pillars Hotel in the CWP offers the chain's own brand of spa facilities, Spa 6, a luxury health spa for the body and mind. Likewise, the Lower Mill Estate offers its residents the Artspa.

3.74 There are two types of indulgence and pampering offers that would appear to have a direct synergy with the CWP. The first, the health and wellness market is intertwined with the 'Spa' product. The other is in relation to culinary indulgence.

Health & Wellness Market

3.75 In the past, the health and wellness sector was considered primarily as a pursuit of women and the well-to-do elderly. However, research by Mintel has identified new potential segments within the market that can be classified as follows.

- Young people (20-24 years old) who have an average income, mainly using fitness and wellness services. This sector is growing in importance.
- Young families with small children, who come to enjoy spa and water-based facilities. Currently a low sector, but considered to have large potential.
- Mid-aged adults (aged 40-50) who look for preventative cure methods and relaxing experiences. An important sector because of heightened health fears and the need for illness prevention.
- Older generation (50-60 years old), the traditional market who tend to stay longer because of the need for specific treatments.

3.76 In addition, some spa's report a 50:50 ratio of male to female use, although purchase is still more likely to be female driven.

3.77 Young and affluent couples (commonly known as 'Dual Income No Kids' - DINKS) are apparently showing great interest in resort/hotel Spa's, particularly for short breaks. It is believed that this group, particularly those with stressful jobs, are prepared to pay for being pampered and believe that de-stressing and relaxation are achievable in a short period of time.

3.78 The health and wellness sector does have a direct synergy with two existing offers relatively close to the CWP, Bath and Cheltenham, and is promoted as an experience of the Cotswold AONB through the Spa Towns: A Living Spa Tradition in the Cotswolds.

3.79 Outside of city and town-based spa resorts, a key requisite for health and wellness is high value landscapes and attractive environments in order to complete the full ideology of a health and wellness visitor. In this respect, the landscape of lakes and rural character of the CWP, when mixed with health and wellness products, could conceivably present an ideal opportunity for people to relax and unwind. This concept has no doubt been at the forefront of the Four Pillars, Lower Mill Estate, and Watermark estate when developing their respective health clubs and spa facilities.

Culinary Indulgence

3.80 The association between tourism and food has long been recognised. It is a valued part of the overall experience for visitors, and provides a distinct contribution to the overall value of visits to any given destination. This relationship is denoted in the visitor research for Wiltshire which estimates that as much as 23% of the value of overnight trips (approximately £17 per night), and 27% of the value of day trips (approximately £4.30 per day trip) is spent on food and drink.

3.81 The spectrum of culinary indulgence is fairly broad, and can stem from tasting a geographically specific produce in-situ, to a trip being motivated by the presence of a restaurant or offer recognised as being of high quality. An advantage of fostering links between tourism and food and drink is that visitor spend can be directly linked to the local economy and supply chain, especially if catering establishments can be encouraged to sell and promote local produce. Furthermore, the availability of good quality, geographically distinctive foods can be a means of securing greater awareness for the destination.

School/Education Market

3.82 The Schools/Education market is a sector that looks set to grow further. This is in response to the Government's outdoor learning manifesto released in 2005, which promises every child the opportunity to participate in an out-of-school trip whilst they are at school age. The main aim of this proposal is to expose children to the environments that they learn about in the classroom, so that the learning process is more meaningful.

3.83 The advantages associated with the schools and education market are that:

- visits can coincide with off-peak periods, thus helping to utilise spare capacity; and
- pupils provide the potential to generate repeat visits with parents, friends and relatives.

3.84 However, the response in terms of supply needs careful consideration because of the potential risks (site risks, health & safety, public liability, teacher liability, child protection) associated with this market, and any negative event tends to be very high profile in terms of media coverage. As such, various on-site risks need to be suitably addressed prior to targeting this market.

3.85 Sites and organisations that will have the greatest capacity for realising the potential of the schools and educations market will be those that:

- provide a coherent programme of timetabled activities;
- provide students with task lists to be used as the basis of future work;
- challenge students to discover for themselves, utilising the key features or aspects which are unique to the site;
- allow pupils to work in small groups, with each group completing different tasks; and
- provide activities geared toward different age groups, curriculum and subject areas.

3.86 The immediate education market for the CWP is evident through the existing facilities that target this market – South Cerney Outdoor Centre, Friday Island and Head-4-Heights for example. However, a cursory review of other existing outdoor education establishments in the UK suggests that these are comparatively small-scale, and lack on-site accommodation.

3.87 To act as a contrast, the primary outdoor education operators such as PGL, JCA and Kingswood invariably have much larger complexes with residential capacity. Kingswood, for example, has several facilities that can cater for between 300-500 students at any one time.

3.88 There is certainly scope in relation to the assets for greater exploitation by this market, especially given the central location of the CWP and the estimated 20 million residents within a 2-hour drivetime. A further part of this package could be a distinctive focus on the natural habitats (e.g. habitat creation and protection), the archaeological and geological interest to provide a much more varied offer that can help fit in with key parts of the National Curriculum.

Summary

3.89 This overview of the market context for the CWP demonstrates that the destination has the capacity to become an important resource for a number of different user groups.

3.90

4 Policy Context

4.1 Tourism is not a statutory sector of planning policy. However, tourism is recognised as being a cross-cutting sector that can influence on, or be influenced by other elements of the planning framework. As such, the different levels of Government approach tourism from a strategic sense, depending on the relevance of tourism as a business, economic and landuse sector; or their involvement in directly managing and supporting the sector (tourist information centres, museums, and reserves for example).

4.2 The following provides a synopsis of the principle tourism documents and policies at a national, regional, and sub-regional level that need to be taken into consideration.

National

4.3 At a national level, the importance of tourism as a UK business sector is now generally well founded, with statistics and research provided by DCMS, VisitBritain, and other partners helping to support this case. In particular, tourism is seen as a means of driving rural economies, assisting with the regeneration of urban economies, and encouraging inward investment and an entrepreneurial spirit.

4.4 Moreover, in contrast to many other sectors, tourism is actually regarded as being potentially complimentary to the other concerns, particularly in relation to the environment as a means of supporting conservation needs and subsequent practices of the most fragile landscapes and habitats; but also as a means of supporting local amenities and services that benefit local communities that would otherwise be economically unviable.

4.5 However, as with any economic activity, tourism can also be at odds with other aspects of land-use and development, including putting pressure on fragile habitats, causing disturbance to local residents, and causing a shift in amenity provision that favours visitors as opposed to residents. As a result, it is generally recommended that a core aspect of any vision or strategy relating to tourism is to ensure that tourism is a sustainable activity that balances the needs of all stakeholders.

4.6 This requirement is now entrenched within the recently published Good Practice Guide on Planning and Tourism by Department for Communities and Local Government. In particular, policy recommendations are to be aligned to the following guiding principles, namely:

- maximising the benefits of tourism, in particular ensuring that the development is able to reach its potential to contribute to tourism in the area and for local communities to enjoy those benefits;
- identifying optimal locations, for example to maximise synergies with other tourist attractions and to promote opportunities for access by public transport;
- integrating development sustainably within its surroundings both in terms of design and layout and in the way that the service or facility is able to function; and
- avoiding adverse impacts, for example by disturbance to activities on adjacent land.

4.7 The current and future tourism potential and capacity of the CWP will need to be assessed in relation to these overarching principles to ensure that a suitable balance is achieved between maximising tourism opportunity whilst maintaining the sense of place and fabric that make destinations special.

Regional

South West Tourism

4.8 South West Tourism is the agency responsible for the delivery of a successful and sustainable tourism sector within the South West region. The latest Tourism Strategy denotes that by 2015,

> *'..the South West of England will be internationally recognised as a model tourism destination. This will be achieved by creating a unique balance between the environment, communities, industry and visitor satisfaction, while earning long-term economic, environmental, and social benefit for the whole region'.*

4.9 In particular, South West Tourism is seeking to achieve a sector that is markedly less seasonal; achieves higher visitor satisfaction levels; is able to command a premium price over competing products in other regions; recognises the environmental impact caused by visitors; and is welcomed by host communities.

4.10 Rural tourism and adventure-based activities are recognised as particularly important brand clusters, through the 'Close to Nature' and 'It's Adventure'. Likewise, the 'Discovery' cluster is aimed at specific niche activities and 'Relax and Recharge' seeks to encourage greater relaxation as an antidote to busy lifestyles.

4.11 The development of rural tourism has been the subject of a specific study named, 'The Rural Dimension', in order to maximise the opportunity to benefit from rural-based tourism. The study examined the key business drivers and visitor motivations for visiting the more rural areas of the region. The importance of tourism from a rural perspective is defined supporting the rural economy and sustaining viable communities through providing additional income streams for farming and other land businesses; generating a means of encouraging new business ventures in rural communities; supporting local services, facilities and amenities that benefit both residents and visitors alike; and thus driving the retention of greater amounts of spend within the local economy.

4.12 However, a key conclusion from the study is the fact that consumers do not view the destinations they visit as rural, but rather as 'countryside'. This is quite an important concept in the sense that visitors may be disassociating themselves from issues that surround 'rurality' and rural communities, and are perhaps seeking a countryside retreat that, in their minds, 'has no issues'. In turn, this gives an indication as to the expectations of a country-based visit, namely escapism, relaxation, self-pampering, and something far removed from their everyday lives - i.e. their own personal idyll.

4.13 The report also highlights many challenges to the operation of a rural tourism business, and suggests that the different motivation drivers need to be understood. These drivers can be summarised as:

- Location Maintainer Driver - lived in the area for years, and feel like caretakers and custodians of the wider economy and environment. Tourism becomes attractive as a secondary income. The problem, as with traditional rural activities, is that of succession, with younger generations generally looking at other activities. Also cost pressures in relation to tourism are reducing its profitability;
- Life Change Driver - predominantly people in their early 50's seeking a life change, both in terms of location and business activity, though location tends to be more important. As a life-style business, there tends to be a good level of service and standards because of personal standards and beliefs. However, also related to this is the fact that the format and design can sometimes be more geared towards their own preferences rather than that of the visitors themselves. This reflects the fact that they have had little or no direct experience of the tourism industry prior to purchase; and
- Profit Generation Driver - these tend to be tourism specific businesses on a larger scale than the previous two drivers, and operate as a stand-alone business. It is recognised that additional pressure is being placed on these businesses due to spiralling energy costs, property and building costs, insurance costs, and the fact that the local labour market is diminished. Here, the report suggests that greater business support and a positive approach to rural tourism enterprises from a planning perspective is essential.

Local

Gloucestershire

Wiltshire

Oxfordshire

CWP Strategies

4.14 The Cotswold Water Park Joint Committee has produced a series of policy and strategy documents for the Cotswold Water Park since its conception in the late 1960's. The most recent strategy to be produced is the Cotswold Water Park Strategy 2000-2006. In this Strategy, tourism is recognised as being a fundamental aspect of the vision for the Water Park alongside nature conservation, sports, recreation and leisure.

4.15 In relation to tourism in the CWP, the Strategy highlights a number of observations and key requirements.

- The Cotswold Water Park is well placed for touring the Cotswold AONB.
- The national wetland habitat status attracts many visitors particularly over the winter and spring creating a year-round profile of tourism activity.
- As the popularity of activity holidays increases, further promotion of sport and recreation is needed.

- There is potential to reconstruct the Thames and Severn Canal, possibly with the provision of marina facilities.
- Low-cost accommodation in the form of youth hostels, camping barns and sports centres is needed to complement the current accommodation stock.

4.16 The strategy also highlights specific concerns over the development of holiday accommodation that is marketed as second homes in the countryside. Concerns centre upon three perceived issues:

- marginal contribution to the qualities of CWP;
- not just occupied for holidays; and
- design of certain accommodation has not reflected the visual qualities of CWP.

4.17 As a result of these concerns the Strategy calls for further development of second homes at the expense of other forms of holiday accommodation to be resisted.

4.18 The Strategy also recognises that better tourism promotion is needed and alongside this a 'sense of place' needs to be developed. More effective national marketing is called for promoting the CWP as a destination for 'green tourism'.

4.19 The Strategy sets out objectives for each section of the CWP. Those objectives associated with tourism are set out below:

- Western Section – Promote the whole spectrum of short and long-stay tourism accommodation to accommodate all price sectors, backed by new facilities and an improved image of the Water Park for day visitors and sports people.
- Central Section – Tourism development should be restricted to those uses associated with and supporting the long-standing commitment to reconstruct the Thames and Severn Canal to allow sustainable visitor access.
- Western Section – Promote new tourism proposals in a landscape specifically restored to meet nature conservation and landscape objectives.

4.20 In addition to the objectives for each section of the Park, a number of projects were put forward as a focus for action, many with tourism implications:

- Improvement of Keynes Country Park (KCP) – Pursue improvement of KCP to increase its attractiveness to visitors.
- Cotswold Water Park Centre(s) – Construct one or more facilities to provide a major visitor centre for the CWP.
- Facility to improve access for the public to the Eastern Section of the CWP – Provide a country park or similar facility. This would improve the Water Park's overall benefits to visitors.
- Comprehensive, integrated recreational route network – Provide a signed network of footpaths, cycle routes and bridleways linking all parts of the Park and beyond. Visitor interpretation and facilities should be provided along the network.

- Restoration of the Thames and Severn Canal from the Thames to the Water Park – Restoration will open up an important leisure, recreation and tourism corridor.

Developing Capacity

4.21 A significant feature of the CWP in relation to tourism is the proposed investment in tourism stock, especially within the commercial accommodation sector. The following provides a review of these developments and their potential to present a more significant tourism offer within the CWP.

Developing Assets and Attractors

Proposed Leisure Developments

4.22 Throughout the course of this study, it has become apparent that there are a number of other initiatives that are being developed that will have an influence on the CWP. This is primarily in relation to its leisure, recreation and sporting capacity. These are detailed within Technical Report 4a, but to reiterate they are:

- The Cricklade Country Way – a multi-use corridor, principally based upon the re-construction of the North Wilts Canal and the extension of the Cricklade and Swindon Steam Railway, which will be accompanied by walking and cycling paths.
- The Cotswold Canals Restoration Programme – a programme designed to realise the progressive restoration of the Thames & Severn Canal and Stroudwater Navigation, inclusive of moorings for boat users, with accompanying towpath restoration for land based recreation use (walking and cycling).
- Cleveland Lakes – the proposed development of a significant rowing centre, potentially offering the only Olympic-sized rowing course in the South West which could host training and competitive events, as well as promoting use by local residents. There are other proposed components for the site, but these are more at an embryonic stage than the rest of the scheme.

4.23 Although the projects are discussed in relation to their value their respective context, the tourism potential of each should also be recognised that:

- previous research has identified the CCW as having a potentially considerable appeal for residents of Swindon and Cricklade, and for purposes that would be classified as tourism day visits (casual leisure, visiting attractions and sights of interest) from each of the components:
    - the development of the Cricklade and Swindon Steam Railway will have an evident appeal to the families with young children.
    - the North Wilts Canal provides a waterway feature which are renowned for having a day visitor appeal, but which will also provide some overnight stays through boat moorings.
    - the enhancement of Route 45 of the National Cycle Network will present a corridor route directly into the CWP area from Swindon, which is likely to provide the significant proportion of day visits.

- the experience of British Waterways suggests that there is considerable commercial leverage that can be placed against developing certain facilities along waterways such as the Thames & Severn Canal and the North Wilts Canal, with the demand for visitor facilities (retail, catering, accommodation) being a principal driver;
- there is increased impetus on the level and quality of sporting venues in the wake of London's successful bid to host the 2012 Olympic Games. Not only are facilities required to improve the performance of British athletes, but there will also be a need for facilities to become training venues, and potentially holding camps for other competing nations. The proposition for Cleveland Lakes, which could be developed as early as 2010, may help to fulfil this type of function for rowing within the South West (a recognised gap in existing sports facility provision), with athletes likely to require supporting services (e.g. accommodation and catering). Furthermore, such a facility could also be used to host sporting events, which are now recognised as having significant potential in attracting visitors both as competitors and spectators.

4.24 These developments would appear to have a strategic fit with the overall aspirations of the CWP. They would also provide a collective mass of additional assets that, when combined with the existing assets and other potential assets of the CWP, would present a real destination of distinction upon which a coherent tourism offer can be presented.

Proposed Nature-based Developments

4.25 The importance of wildlife and nature to the tourism offer in the CWP could increase significantly through development proposals identified through the Master Planning process.

4.26 As defined in Technical Report x: Biodiversity, there are several significant propositions that are being considered as part of an aspiration to increase the biodiversity value of the CWP, namely

- Cleveland Lakes – in addition to the sporting complex, the CWPS has identified the desire to create a beacon for nature conservation on the site, which will include walkways and observation areas for visitors and to avoid human disturbance of sensitive species.
- RSPB – the RSPB has been actively seeking a site in the central area of the CWP (located within the Eysey Manor estate that is currently subject to extraction) to potentially establish a significant visitor-focussed nature reserve that offers a variety of habitats. With over 1 million members, such a site would immediately place the CWP within this significant market context. Moreover, with a high level of awareness of the RSPB as an organisation, this site could well attract significant volumes of non-members also, a factor that the RSPB are seeking to bolster membership numbers.
- WWT – through its considerable activities in and around Lower Moor Farm, the WWT is aiming to showcase the wildlife of both lakelands and lowland meadows to a wider audience. The WWT is always looking to take advantage of opportunities to bolster their activities, and to sustainably present their activities their activities to a wider audience base. This now includes agriculture through their management of Blakehill Farm. As part of the wider wildlife trust partnership network, the WWT sites are already promoted amongst partnership's 670,000 collective members.

4.27 Section x of this report identifies the market trends in nature-based tourism and the direct synergy that wildlife has in relation to being a motivator behind visits. Therefore, these developments could have a significant affect not only on the biodiversity, but also in relation to the tourism offer of the CWP. In fact, this could manifest itself as a significant driver of tourism, with its central UK position being an advantage in terms of market penetration capability. This will need to be matched with appropriate (i.e. environmentally conscious) supply-side developments, especially in accommodation.

Developing Accommodation

Existing and Developing Provision

4.28 The largest commercial accommodation development within the CWP, the Four Pillars Hotel, is now open. It is understood that the hotel will be predominantly geared towards the business market, however leisure visitors will form a key part of the business plan in order to fill spare capacity at weekends in particular. This premise is evident in the inclusion of spa and leisure facilities within the complex, and the fact that part of the accommodation provision itself has been defined as fractural ownership, namely individuals investing in particular rooms with access for their own use for certain periods.

4.29 The Four Pillars appears to have acted as a catalyst for further interest in hotel investment within the CWP with other proposed hotel development applications being received by the Cotswold District Council's planning authority. For instance:

- outline planning permission has been granted for a further hotel (66-bedroom) to be sited opposite the Four Pillars site;
- a 120-bedroom hotel and 160 holiday cabins are to be developed within the Claydon Pike site, which is set to become a multi-use Country Park. It is understood that this development is now progressing; and
- a further hotel was incorporated within a large scale holiday complex covering lakes 103, 103a and 104 located to the west of Lechlade. This development was refused planning permission by Cotswold District Council, but the application has recently gone to appeal.

4.30 Further proposals have also been identified for second home and holiday home complexes. According to the existing planning consents, a further 700 properties are in line to be developed in the near future. Again, it is likely that a proportion of these properties will be utilised by their owners as holiday lets as a means of securing a return on their investment. Overall, this indicates a clear commercial interest for accommodation growth within both the serviced and self-catering sectors in the CWP.

4.31 Both types of development propositions appear to have more upmarket connotations, but there is a question whether the supporting infrastructure is of sufficient quality to provide a more holistic experience of the CWP for these visitors. The onsite development of spa facilities will certainly assist, and there is likely to be some interest in watersports amongst this market. However, there is currently a lack of an upmarket culinary offer, and whilst there is existing opportunity to play golf in the CWP the courses are not of a unique nature that would drive visits. Given the fact that these properties already exist, there will need to be some consideration for how the opportunities that are now available to exploit this market should be maximised.

4.32 As identified, the level of commercial interest in the CWP is growing. There is a concern that, if allowed to continue unchecked, this may further change the dynamics of the CWP to a position that could well compromise the overall sustainability of the destination. This is a concern both of existing residents and owners of second homes, both of whom share a desire to see the CWP retain its rural character and charm, which remain the key reasons for settling within the area.

4.33 Therefore, any further developments in these accommodation sectors should be carefully considered against the overall strategic context for developing the CWP.

Gaps in Accommodation Provision

4.34 On the basis of this context, it would appear prudent to consider other accommodation types within the CWP. Based upon the potential markets identified, there are current gaps in accommodation provision that would be required if the CWP is to develop a broader overnight visitor market. This includes:

- Touring camping and caravanning sites – although some touring provision does currently exist within the CWP, it is felt that further capacity could be developed. This provision has a distinctive fit with the family and outdoor adventure market, especially if associated with some level of on-site activities – swimming, fishing, sailing, etc. Furthermore, camping and caravan sites are increasingly becoming active in direct intervention in on-site conservation, with the David Bellamy awards a scheme that actively promotes, encourages and rewards this type of practise.
- Budget/hostel accommodation – the current gap in this provision is especially evident against the education market, with this market having a distinct synergy with formal outdoor activities (i.e. sailing, water ski-ing, kayaking) and the growing nature-based education capacity through biodiversity initiatives. As with camping and caravanning, this accommodation could also be utilised by activity groups and outdoor adventurers requiring lower cost accommodation.
- Low capacity, high value accommodation - principally matched against the nature-tourism potential of the CWP, this type of accommodation could be utilised to showcase an eco-tourism style product. This could also be done in association with the lakes that could almost become an icon for the CWP.

4.35 The CWP is a destination that can absorb appropriate levels of different accommodation types. Moreover, it is a destination whose assets are likely to need support from different types of accommodation in order to stimulate overnight visits from likely target markets. Therefore, a key part of the Master Plan should be to ensure that a suitable mix of accommodation is available that can cater for different market needs.

Summary

4.36 The developments highlighted above are already happening in the CWP, denoting that the commercial, leisure and nature conservation opportunities are already being explored and exploited.

4.37 Although the rationale for the developments in assets and attractors is not necessarily based on a wider strategic plan for tourism, most are in essence complimentary developments that collectively could deliver a relatively coherent tourism offer. This is fairly obvious in the case of CCW and Thames and Severn Canal developments and the connectivity that this link would bring to the wider waterways network; in relation to the RSPB proposal and nature conservation; and in developing Sustrans routes in the case of leisure and recreation access. However, there is a complimentary link between them also; canals can bassist with nature conservation and provide important nature movement corridors; canals have obvious links with leisure and recreation opportunities through boat cruising, cycling, walking and possibly horseriding; the sporting opportunities proposed at Cleveland Lakes will have a considerable element of fun-based leisure and recreation, and is also proposed to include nature conservation. Overall, therefore, each project appears to have a strategic fit, though it will be necessary to review the actual composition of certain projects to ensure that this is not compromised in the future.

4.38 The development of accommodation is also continuing apace in relation to both serviced, holiday home and self-catering properties. Although there is a market fit in relation to certain elements of the product (e.g. families in self-catering accommodation; corporate team building groups utilising serviced hotels; and more upmarket leisure market utilising the CWP for spa and relaxation, and visiting the AONB at weekends in serviced accommodation), a concern is whether the nature of the accommodation will satisfy other potential overnight markets (e.g. wildlife enthusiasts, budget conscious family groups, outdoor adventurers, activity enthusiasts, and outdoor education groups).

4.39 On this basis, it is believed that a more appropriate accommodation mix is needed within the CWP if it is to maximise its market potential for overnight visits. This should include increasing capacity in touring camping and caravan pitches, exploring the potential for low cost accommodation linked to youth groups and outdoor education, and investigating the demand for low volume high value accommodation linked to nature-based tourism.

5 Key Issues & Considerations

5.1 It is clear from the audit that the CWP has not fulfilled its potential in relation to becoming an important tourism destination in its own right, a potential that was identified as early as 1969.

5.2 At present, it is informal recreational and leisure facilities of the CWP, especially Keynes Country Park, and sports participation that provide the motivational forces to drive visitation, with anecdotal evidence suggesting that these are predominantly day visits. There has been some limited capacity for overnight visits for a while, driven mainly through the Hobourne Holiday Park. However, outside of this facility, there are few other developments that acted as drivers of tourism visits until recently.

5.3 This is now changing through the emergence of development proposals both in relation to the product, and in relation to accommodation capacity. Both the accommodation and composition of assets and attractors are developing, and are changing the fabric of the CWP to make it more conducive to the tourism sector. Therefore, it is important for this Master Plan to take into account the key issues relating to the current offer, and to consider development options to ensure that they are complimentary and have a cohesive fit. To date, this has not always been the case.

Key Issues

Existing Product

5.4 The audit and consultation for this study has revealed several key issues in relation to the existing tourism product that are considered to present weakness in relation to the CWP being considered a tourism destination. These include:

- the spatially disjointed nature of the primary assets of the CWP, and the fact that the sites lack connectivity;
- the lack of an interconnecting network of leisure and recreational routes that covers the whole of the CWP that can be used to promote the CWP as an overnight and tourism day visit amongst this important groups;
- the lack of pay-and-play facilities in relation to more formal pursuits (e.g. watersports) in the CWP, and the limited nature of those that do exist (i.e. golf);
- the position of Keynes Country Park as the CWP's main tourism asset (from a market perspective at least) which is away from the main access road (i.e. A419 and beyond the Spine Road); and
- that the main visitor attractors are predominantly weather reliant;
- the thematically inconsistent approach to the promotion of certain assets in the CWP (i.e. Lechlade and Fairford are related much more to the Cotswold AONB than Cricklade and the western section of the CWP);

5.5 Ideally, the future tourism offer should bring much more cohesion and coherence to the CWP as a destination so that geographically it presents a distinctive area, and whereby its assets (the lakes, waterways, attractions, facilities and commercial centres) albeit with there own clear function, collectively have a role in holistically presenting the CWP to its target audiences.

Product Development Issues

5.6 The projects and proposals currently identified that are seeking to develop the CWP generally appear to be a positive step in realising this aspiration.

5.7 However, as identified, there is a concern over the strategic fit between those developments seeking to develop assets and attractors and the observed accommodation proposals. Although there is certainly a case can now be made in relation to recent accommodation developments, there needs to be greater consideration for the types of accommodation going forward and whether they present a suitable proposition that compliments the other aspects of the CWP and can deliver potential to exploit observed target markets.

5.8 Overall, the developments should seek to retain a countryside character as a fundamental part of retaining the appeal of the CWP both as a place to live, work and visit. The ‘suburbanisation’ of the CWP is one of the principle concerns of local residents, with further hard development appearing to detract the rural, peaceful, and tranquil properties.

5.9 Any further hard-based development of the CWP for tourism purposes needs to be carefully considered against the overall aspirations.

Key Tourism Opportunities

5.10 It is clear that the CWP has tourism potential, but this potential has only recently started to emerge with any great conviction.

5.11 Whilst it is important to ensure that investment is being made in the CWP, this investment needs to be appropriate to the overall ambitions and aspirations of the CWP to ensure that there is a clear rationale and justification for any proposal and that this will meet, as best as possible, the needs of all stakeholders.

5.12 In this respect, Scott Wilson feels that the following provides the main tourism development opportunities for the CWP.

Family-based Attraction/s

5.13 The CWP has the makings of a significant family-based destination. Keynes Country Park, as the main visitor attraction in the area, provides a distinct example of the potential appeal to families.

5.14 From a wider perspective, this type of approach has a significant fit with a number of factors:

- in relation to the healthy living agenda, children are a key target audience, with a need to reverse a generally held view that children are doing less outdoors nowadays than in the past, caused by a combination of safety fears, greater levels of entertainment indoors and perceived access barriers to facilities;

- the family market remains a significant market for the UK's tourism sector, but expectations of a 'family-friendly' experience are not being met by the reality in many cases;
- beyond its coastal areas and its cities, there is still capacity in the South West to benefit from having identifiable inland resources that have dedicated family-friendly things to do and see; and
- both second homes, and certainly the self-catering lets that are associated with them, are likely to have a family-orientation and therefore there is a reliable market to potentially could be used to underpin appropriate assets and amenities.

5.15 The scope of family-based attractions is very broad, and can include themed attractions through to private collections of miniature railways, model villages, and museums. Whilst it is not envisaged that the CWP will be conducive to an Alton Towers or the next Eden Project, there is still plenty of scope within this range for the CWP to develop a sizeable yet appropriate series of attractions to compliment Keynes Country Park. This could certainly include:

- further leisure-based attractions – building upon the relative successes of the Butts Rare Breeds Farm and Keynes Country Park, both of which have a distinct family focus. In the case of farm-based attractions, there are exemplars of best practice that provide the scope of such attractions (e.g. Hatton Country World in Warwickshire - 190,446 visits in 2002; and its sister attraction Willows Farm Village in Hertfordshire - 273,000 visits in 2005);
- a focus on family-fun and family adventure – the capacity for waterside areas to present a family-fun offer is unquestionable with both beaches and inland water resources in the UK renowned as being places that attract significant volumes of family users. The potential advantage of the CWP is that it can cover a lot of different interest in the one area – i.e.:
    - family-adventure through participation in windsurfing, kayaking, water ski-ing, and the availability of facilities such as Head-4-Heights and paintballing; and
    - family-fun based on more defined recreation and leisure routes (i.e. cycling and walking) through the CWP that would predominantly be part of a 'trails' network that includes elements of discovery (e.g. wildlife, heritage) targeting the family use, and linked to attractions.
- family-leisure, which would work in combination with the other components mentioned above, but also with other elements such as the CCW and Thames & Severn Canal as settings for more casual recreation and leisure.

5.16 If taken individually, these activities would conceivably each be targeting the day visitor market. However, the significant benefit of the CWP is that they would, at least theoretically, be grouped geographically in the one destination. Once packaged with accommodation, the combination and seemingly complimentary assets would present a significant mass to allow the CWP to be presented as an overnight visitor destination, certainly for short breaks but also to perhaps second longer holidays to a more modest extent.

Nature-based Tourism

5.17 As previously identified, nature-based tourism is becoming increasingly recognised as a significant driver of visits to destinations.

5.18 There is a definite potential for this sector to be explored further within the CWP as the biodiversity capacity increases. This presents a synergy with other potential aspects of the tourism product identified for the CWP, with nature reserves often featuring within a softer tourism package where walking and cycling are also offered. Furthermore, wildlife and nature-conservation programmes featuring within the educational syllabus.

5.19 On the whole, nature-based tourism is built around the adult market, though there are active programmes that seek to bring wildlife to the attention of younger audiences, with the organisations such as the RSPB introducing the Pheonix Programme for example. In this respective, wildlife and nature should be increasingly integrated into more informal leisure and recreational activities traditionally enjoyed by family groups, i.e. walking, cycling, and having picnics, etc.

5.20 There are, however, management implications for destinations seeking to integrate tourism and nature, with the potential for conflict increasingly evident whereby visitors can unwittingly cause damage to highly sensitive sites due to inappropriate behaviour. This is an important consideration for the CWP given that it holds in two Special Areas for Conservation (North Meadow and Clattinger Farm). Wiltshire Wildlife Trust are seeking to protect Clattinger Farm by providing a much broader reserve that offers a better range of things to do and see at Lower Moor Farm in order to act as a ‘buffer’ zone. This zone can be managed more effectively in relation to visitors, and can actually provide more interest than Clattinger Farm through interpretation and the hides available.

5.21 It is suggested that other sites could also provide a suitable visitor buffer, absorbing most of the visitor traffic that will allow more sensitive sites, both existing and future, to be more focussed on achieving more explicit conservation biodiversity aims. In this respect, the visitor-based reserves should be used to leverage the funds needed to achieve conversation actions. It is understood that this happens on a macro scale for individual organisations (i.e. the RSPB will leverage additional funds from sites such as Titchwell in North Norfolk as one of its flagship visitor reserves to support other sites in its portfolio). However, given the principle organisations currently and potentially involved in the CWP (i.e. CWPS, WWT, GWT, RSPB and Natural England), a co-ordinated and co-operative approach in relation to the CWP will required. This co-ordination and co-operation is being delivered through the BAP in relation to conservation practices, but could perhaps be extended to incorporate visitor management implications also.

Sport

5.22 Sports tourism can be a significant driver of tourism visits through participation and through spectators of events.

Watersports Participation

5.23 Given the context of the CWP and the lakes that exist, watersports provides the obvious niche in the wider sports tourism sector. This is already being fulfilled to a certain degree through existing provision. However, the lack of pay-and-play facilities means that utilising watersports as a means of attracting visitor is difficult. This position will need to be addressed if the tourism potential from watersports of the CWP is to be realised.

5.24 The watersports sector is broad in relation to actual activities that can be undertaken. As such, the CWP does have potential to exploit this further.

5.25 A world class rowing centre is already being proposed in the CWP that could act as a significant attractor of participation and spectator visits. In addition, there may be possibilities to explore the capacity for developing a high quality, specially designed sports fishing venue; adventurous watersports such as jet ski-ing and water ski-ing. The positioning of such sports in suitable locations away from residential areas and close to access points will be important to ensuring any environmental impacts (both visual and noise-based) are kept to a minimum.

5.26 The nature of the lakes means that it will be difficult to provide a world-class sailing lake such as Rutland Water, or to present a challenging course for kayakers to navigate for example. However, the existing watersports should not be forgotten, with the CWP providing opportunities for new participants to learn and develop skills at a grass-routes level. In this respect, the CWP has a potentially important role to play in encouraging participation at all levels, but especially amongst the young and socially disadvantaged. Participation through educational and youth group channels will be key in this regard, and thus suitable provision in amenities will be required within the CWP.

5.27 There is a need to build on this link, and encourage repeat visits outside of an educational framework through the family group, recognising that the views and motivations of children can have a very apparent influence on the choices of their parents in relation to breaks and holidays. If the CWP can engender a reputation for safe, secure and professionally instructed watersports participation, parents would have the confidence to take their children to such facilities, conceivably on a repeat basis. Moreover, parents themselves might be encouraged, perhaps through promotional and incentives campaigns, to also participate. In this respect, the CWP could form a key component in delivering the Healthy Living Agenda and Active UK programmes for local communities.

5.28 There is also an increasing recognition that providing access to sporting and leisure opportunities can be used to tackle social disorder issues . For example, fishing is now being targeted as a means tackling behavioural problems amongst youths, with initiatives such as ‘Get Hooked on Fishing’ (as successfully trailed in County Durham) able to teach young people new skills and be involved in something constructive that it is hoped will divert them from the possibility of becoming involved in anti-social behaviour.

Other Participation Sports

5.29 Although the natural sport sector for the CWP is in relation to watersports, there are other opportunities for sports in the CWP. The most obvious existing sport is Golf, with golf clubs at Oaksey and South Cerney.

5.30 It is understood that the golf courses within the CWP are available to tourists on a pay-and-play basis, but they provide more of a supporting role rather than being a key driver for visits. The nature of the CWP suggests that this observation could be rectified through some creative development. The example of TPC Sawgrass and its hole surrounded by water has already been mentioned. It is estimated that over 100,000 balls are retrieved from the surrounding water every year, primarily courtesy of tourists trying their luck.

5.31 This type of 'challenge' would certainly help place the CWP on the golfing map. It is certainly felt that this would have a strategic fit in relation to the clientele of the Four Pillars hotel – i.e. corporate packages could be developed to include a round of golf based for business visitors, whilst golfers could be targeted much more effectively as a means of filling spare capacity at the weekends for example, with the market having a distinct affinity with serviced accommodation.

Sports Events & Athlete Development

5.32 The proposed plan to convert Cleveland Lakes into a world class rowing facility could certainly provide a catalyst for increasing the interest in rowing.

5.33 Through the award of the Olympics in London in 2012, the level and quality of sports facilities in the UK or under increasing scrutiny as the UK seeks to exploit the potential for hosting training facilities and providing holding camp for national teams in the build up to the Games (i.e. to ensure that athletes acclimatise to the culture and climate of the UK prior to the event).

5.34 Rowing is seen as a strategic gap in relation to sports development facility provision in the South West. Therefore, the facility as outlined for Cleveland Lakes could conceivably fulfil this gap.

5.35 Although a high degree of discussion in sport is based upon the Olympics, it is important to understand that the event provides only one opportunity, albeit one that could have a significant benefit in bringing sporting evens and athlete development to the fore. Beyond this, it is the ability to continually generate a competitive environment amongst elite athletes that is the primary requisite of modern sport, and whilst the Olympics provides the ultimate showcase of this competition, events are continually held and hosted throughout the year as athletes seek to benchmark and improve themselves.

5.36 In this context, high quality, modern and accessible venues are required to provide local, regional, national and international events and training facilities. Although rowing has been a success story for the Great Britain Team in recent Olympic Games, the organisation and structures for developing the sport are still in need of strengthening in order to ensure future success. Rowing, as with other sports, needs facilities that are accessible to significant parts of the population, and athletes need suitable places to train and develop their skills. Cleveland Lakes has the potential, therefore, to provide a significant boost to the development of rowing in the South West of England.

Recreation and Leisure

5.37 The recreation and leisure potential of the CWP is generally considered to revolve around activities that are 'soft' in nature, with walking and cycling recognised as the most popular activities undertaken whilst on a trip.

5.38 The advantages of these activities is that they require moderate infrastructure (clear, easily accessible, and waymarked routes), and once established they are an asset to encourage repeat visits. This offer will need to be coherent, of sufficient quality, consistent, and easily accessible. The current walking offer is perhaps the most developed in the CWP, but even here the network appears disjointed and fragmented. In this respect, the CWP should seek to deliver a full network of routes.

5.39 Ideally, this network of leisure and recreation routes should build from the access points into the CWP from the wider leisure route network. This currently includes Sustrans Route 45 travelling north to south via Cricklade, and the Thames Path which travels west to east. Other proposals will potentially have a significant impact on this leisure route provision, with:

- The proposed Sustrans Route 57 providing a cycle route connecting from the east to Cricklade;
- The CCW enhancing walking and cycling provision in its own project remit (via Sustrans route 45 and the North Wilts Canal towpath), but as a route into the CWP via Cricklade, there are recognised opportunities to link this into the wider network; and
- The Thames & Severn Canal Restoration is to include a multi-user towpath that will travel east to west, potentially linking into the North Wilts Canal.

5.40 Directly linked to these routes, there is the potential to have spurs that interweave across the CWP linking all the settlements and places of interest.

5.41 This aspiration is not straightforward, particularly based upon the current Public Rights of Way network which is largely fragmented and excludes significant sections of the CWP. It is likely that Permissive Access will need to be secured through discussion and agreement with landowners. In addition, as a result of mineral extraction application process, scope should be included for discussion with land developers/owners in relation to securing public access as part of any restoration strategy or after-use planning application, and possibly during the mineral extraction process as long as safety requirements can be met.

Marketing & Management Considerations

5.42 As a result of the growing sophistication of the visitor market, the development, marketing and promotion of tourism destinations is becoming increasingly targeted towards different experiences rather than specific places. This does not mean that a destination becomes solely geared towards one market, but rather the cumulative assets are defined and their use or uses matched against the most appropriate audiences – i.e. defined against experiences. These then become the target markets.

5.43 It is our view, however, that the place still has a significant role to play in any tourism destination. People like to feel that they are going somewhere as well as doing something. Therefore, the place branding is equally important, and should run alongside experience branding.

Experience Branding

5.44 The South West Tourism approach to its marketing of the region exemplifies the approach of experience branding through its brand-clustering system. This system accepts and promotes the fact that the same land mass can have different assets which act as different motivations to visit for different people. For instance, the Cotswolds AONB can be a place for adventure and activity; a place for family holidays; a place to discover nature; a place to relax and unwind; or a romantic destination; all depending on the expectation and required experience of the visitor.

5.45 This approach has the advantage that it is less place-specific, and thus can start to break down barriers and sometimes misconceptions that places have particular nuances towards a specific experience. It also means that new and relatively unknown places can be introduced to the market based on the fact that it can cater for particular experiences. This 'branding' philosophy is set to become even more prominent in the future.

5.46 The CWP automatically lends itself to two potential brand clusters in the South West; 'adventure and activities'; and 'close to nature'. In this respect, the CWP is already mentioned in relation to providing some of the inland fishing opportunities in the region, and having a network of walking and cycling routes. Based on the assessment of future development opportunities, the experience-based branding of the CWP could be expanded to include sports and indulgence (health and spa).

Issue of Designations

5.47 A suggestion that has been discussed through consultation is the role that the Cotswold AONB, or having its own designation such as National Park status, could have.

5.48 On face value, association with the Cotswold AONB would appear to be suitable. Certainly in terms of awareness, the Cotswold AONB represents a destination whose geography, generally speaking, is known, and has an offer that drives visits due to its rural nature and its attractive villages. The ability to walk, cycle, sightsee and shop in the charismatic heritage backdrop of its towns and villages are at the heart of the AONB experience. It is feasible that this could be replicated in the CWP due to the rural setting and Cotswold character towns of Fairford and Lechlade, and the proposed growth of walking and cycling as activities. In this context, the offer of the AONB, in its broadest sense, could easily blur into the CWP from a visitor perspective.

5.49 However, the Cotswold AONB also has connotations of a rolling countryside whereas the CWP is much flatter in character; the AONB is a protected landscape is being preserved against the proliferation of modern day structures, whereas there is a number of modern day structures in the CWP; and the CWP has potentially much more to offer in the scope of sports and wildlife tourism, whereas the scope for the AONB to develop and present this type of offer is more limited.

5.50 Given this context it is felt that, if the CWP is developed further as a tourism destination, in the long term the two destinations will be sufficiently different to enable the CWP to become a destination of repute in its own right. But does this mean that it requires its own designation status. The issue of seeking National Park status has been suggested. However, there are a number of constraints to this proposition.

5.51 National Parks were designated in order to protect beautiful areas for the nation. There is no doubt that the CWP will share certain aspirations with National Parks, especially in promoting enjoyment of the countryside by the public. Yet, the CWP does not appear to match the other criteria that would be employed when assessing the potential for National Park status. Taken as a whole the CWP is a site of industrial rather than pure conservation interest. The conservation interest that does exist is more a direct result of industrial activity (i.e. the lakes and the nature conservation potential), but the area still requires manipulation and development to bring this potential to the fore. In contrast, existing National Parks are seeking to preserve, protect and maintain existing assets and features rather than to build or create. Therefore, this route is also not considered wholly appropriate.

Place Branding

5.52 For a destination such as the Cotswold Water Park, the geographical awareness and placement in the consciousness of visitors is going to be as important as to the target market as the experience on offer.

5.53 The Cotswold AONB is an example of a ‘place brand’ of the South West close to the CWP i.e. it is a name which encompasses and represents the destination.

5.54 In essence, the Cotswold Water Park already represents a ‘place brand’. However, a question remains as to whether the name is appropriate in representing the area as a collective destination. As previously identified, ‘Cotswold’ already has place recognition in the respect of the AONB. Furthermore, the Water Park presents connotations of single site water assets that are themed and have water-based rides – e.g. a Wet-n-Wild-style water park.

5.55 The use of ‘Water’ in its singular form also represents an issue for place-branding. The connotation is that is a single site of water, such as Rutland Water, rather than a collective of over 140 sites containing water. Thus, taken as a whole the name ‘Cotswold Water Park’ gives a somewhat erroneous impression of the place on a number of different levels. It is certainly advised that a more suitable name that encompasses both the place and the offer can be established on the back of the Master Plan. This should ideally be based on one or more of its core features, namely:

- the upper reaches of the River Thames;
- its multiple water bodies, comprising the River Thames, the lakes, and the proposed canals;
- its leisure and recreational opportunities;
- its biodiversity potential;
- its heritage that can be traced from the Neolithic Period; and/or
- its communities.