

Berkshire's Framework for Visitor Economy Development



ABOUT THIS FRAMEWORK

This framework describes how businesses and stakeholders in Berkshire's visitor economy can work together to develop and promote tourism. It does not replace existing strategies and plans, it describes the context in which they exist, seeks to influence how they are delivered and informs future activity at the local and county level. Its purpose is to guide the thinking and actions of those involved in the sector directly or tangentially and support a collaborative approach to achieving common goals.

The concept of regenerative tourism underpins the framework to ensure that Berkshire's visitor economy is sustainable and resilient in the longer term delivering net positive impacts for the environment, society and economy. Berkshire is well placed to pursue this approach building on the work of businesses and organisations that are proactively pursuing sustainable and inclusive business practices.

The framework has been created through a process of discussion and input from over 120 businesses and organisations that are involved in attracting, welcoming, serving and managing visitors to the county. It will be championed by The Local Visitor Economy Partnership (LVEP) nationally, regionally and locally which will use it to inform its own activity.



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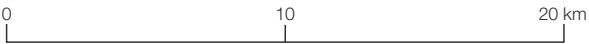
**WOKINGHAM
BOROUGH COUNCIL**



ROYAL COUNTY OF BERKSHIRE



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Attractions

- | | | | |
|----------------|-----------------------------------|--------------------------------|-------------------------------------|
| Amusement Park | Historic Site | Major Roads | Crown Estates Land |
| Castle | Racecourse | Major Rivers | Areas of Outstanding Natural Beauty |
| Festival | Major Towns | River Kennet | North Wessex Downs |
| Film Studio | Berks, Bucks, Oxen Wildlife Trust | River Thames | |
| | | Kennet and Avon Canal | |
| | | Railways | |
| | | Unitary Authorities Boundaries | |



HEADLINES

Proposition

Berkshire's visitor offer is based on world-class built heritage, strong family product, high-profile events and hotels and venues with facilities to support meetings and conferences. Picturesque villages, navigable waterways and high-quality countryside provide opportunities for cultural exploration and soft leisure activity. The destination is easy to get to by road and rail for residents of London, the home counties and the South Coast while proximity to London and Heathrow Airport, connections with British Royalty and the international profile of a handful of attractions and events makes it an attractive destination for many overseas visitors.

Aim

To create opportunities and deliver benefits to everyone with a stake in the county's future by working together and taking a regenerative approach to the development and promotion of tourism in Berkshire.

Principles

- To be guided by sustainable tourism development principles
- To commit to diversity, equality and inclusion
- To work in partnership
- To commit to excellence, ensuring products and experiences are the best of their kind
- To take a data and intelligence-driven approach to decision-making

Objectives

- **Deliver an excellent visitor experience**, by growing and upskilling the workforce and improving the quality of the public realm.
- **Make a tangible contribution to NetZero targets**, by promoting sustainable transport options and taking a responsible approach to the use of resources.
- **Spread the benefits of tourism across the county**, by implementing effective attract and disperse mechanisms both pre and post arrival and promoting the county's thematic strengths.
- **Grow the value of the visitor economy**, by increasing the volume of business tourism, taking a targeted approach to leisure marketing and mitigating the effects of seasonality.
- **Strengthen the visitor offer**, by improving the gateway role of towns, improving accessible and inclusive attractions and experiences, developing the events sector and promoting distinctive rural experiences.



OPPORTUNITIES FOR THE BERKSHIRE VISITOR ECONOMY

MARKETS

In a crowded marketplace and with limited resources it makes sense to target those markets that present the best opportunities for Berkshire to grow the value of the visitor economy and spread the benefits of tourism across the county. The markets that have been selected for both leisure and business tourism are described in tables 1 and 2.

Priority leisure markets	Key features
London and regional England (Northwest, West and Southwest London, Buckinghamshire, Oxford and South Oxfordshire, Wiltshire and Swindon, Bath and NE Somerset, Bristol, Hampshire, SE Dorset, West Sussex and Surrey)	<ul style="list-style-type: none"> • 15.7m people within 1hr40 drive time • Excellent transport connectivity • Product offer for a variety of visitor types • More likely to visit year-round and county-wide • Past success with London's Country Estate campaign • Partners to work with, Great West Way, GWR, SWR, Tourism South East, Visit Thames, neighboring LVEPs • Businesses want to target these markets
North America	<ul style="list-style-type: none"> • Large and mature market for GB • 6 transatlantic airlines providing daily flights from 31 US airports • International profile of Windsor Castle, Royal Ascot, Highclere Castle • Partners to work with, Heathrow Airport, VisitBritain, Great West Way • Businesses say this is a productive market
Germany & Benelux countries	<ul style="list-style-type: none"> • Mature markets for GB • More likely to arrive through channel ports and self-drive • More likely to explore beyond the hotspots • Partners to work with VisitBritain, Great West Way, Tourism South East. • Businesses say these are productive markets



Priority business tourism markets	Key features
London and regional England (Berkshire, M4 corridor, regional business hubs)	<ul style="list-style-type: none"> • A large quantity of company HQs in proximity, London, M4 corridor and Berkshire • Excellent transport connectivity, road, rail and air • Quality venues and hotels plus relevant leisure add-ons • Experienced GMs and venue sales staff • Businesses interested in business tourism
North America	<ul style="list-style-type: none"> • International HQs in proximity, London, M4 corridor and Berkshire • 6 transatlantic airlines providing daily flights from 31 US airports • Presence of recognised branded hotels and prestigious venues • Partners to work with, Heathrow Airport, GWR/SWR, London Convention Bureau, Experience Oxfordshire, VisitBritain, Meet Beyond London • Businesses interested in residential business tourism
Nordics	<ul style="list-style-type: none"> • International HQs in proximity, London, M4 corridor and Berkshire • SAS direct air connections from Oslo to Heathrow • Presence of recognised branded hotels and prestigious venues • Growing market for GB • VisitWindsor's recent experience in the Nordics • Partners to work with, London Convention Bureau, Experience Oxfordshire, VisitBritain • Businesses interested in residential business tourism



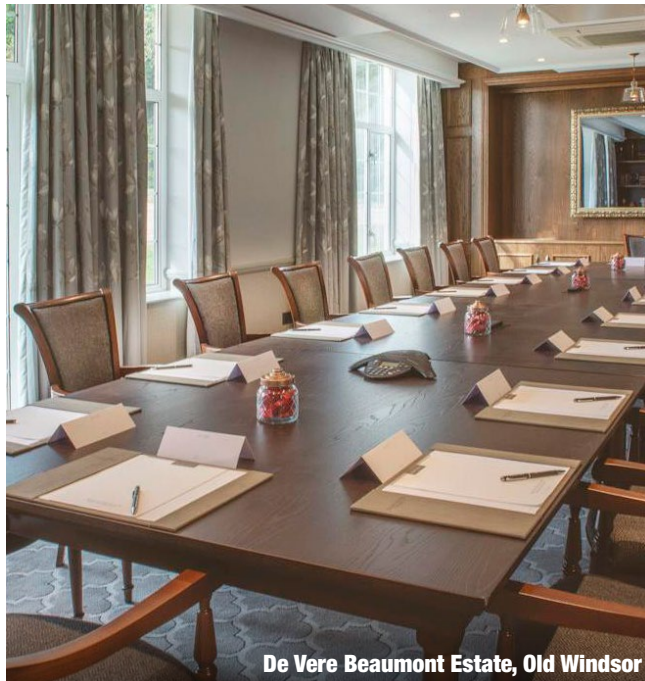
VISITORS

Taking a targeted approach to attracting will make marketing budgets stretch as far as possible. Focusing on visitors whose expectations and needs can be met will contribute to delivering a positive visitor experience and support repeat visits and recommendations. The segments that have been selected are described in tables 3 and 4 with an indication of the products that are most likely to appeal to them.

Priority leisure visitor segments	Type of visit	Market	Core products
Couples, short breaks and day visits	Short breaks, day visits, touring	London & regional England North America (as part of a UK trip) Germany and Benelux	Heritage/cultural attractions including niche, events, outdoor leisure, Thames villages for culture and cuisine, fully independent traveller (FIT) guided tours, river cruising, retail, town centre and country house hotels, upmarket self-catering
Families including multi-generational families, short breaks and day visits	Short breaks, day visits, touring	London & regional England North America (multi-generational)	Family attractions & main heritage attractions, events, outdoor experiences, river cruising, venues for family celebrations, hotels, non-serviced accommodation (whole family)
Youth/student/school groups	Day visits	London & regional England	Main heritage attractions, curriculum related attractions and cultural venues, activities & activity centres, guided tours
Small-scale special interest groups	Day visits	London & regional England North America	Industrial/cultural heritage, location and studio tours, guided tours
Event-goers	Day trips and packaged short breaks	Agnostic, dependent on nature of event.	Royal Ascot, Changing of the Guard, Parallel Windsor, Lapland UK, Reading Festival.



Priority business visitor segments	Type of visit	Market	Core products
Conferences	Residential, some day visits	London & regional England North America Nordics	Windsor hotels and venues Reading hotels and venues Bracknell hotels and venues Sports venues with meeting spaces & facilities Country house hotels Unusual venues Supporting leisure experiences, particularly high end e.g. racing, polo, spas
Business meetings	Day visits, some overnight	London & regional England North America Nordics	
Company training and awaydays	Day visits, some overnight	London & regional England	
Corporate incentives	Day visits, some overnight	London & regional England	



PRODUCT

Berkshire's visitor offer can be grouped into five product themes, three that are well developed - Royal Heritage, Festivals & Events and Family Experiences – and two that are ripe for development - countryside, rivers and canals and screen tourism.

The strongest three define and differentiate the county from its competitors and are the basis for a county-wide marketing proposition. Assets are in place for the two developing product themes but there is scope to improve the range of services and facilities associated with them. Overtime they will become a recognised part of the county's identity.

Royal heritage

The county has long enjoyed the designation Royal Berkshire because of its royal links and associations. The product offer is centred on Windsor Castle and Highclere Castle of Downton Abbey fame, supported by a range of stately houses and landscapes with royal associations including Cliveden and Windsor Great Park. A set of associated events and ceremonies such as Royal Ascot, Changing of the Guard and spectator sports including polo, provide regular and seasonal highlights. The county's Royal heritage presents an opportunity to promote the broader heritage offer which includes industrial heritage in Reading, and cultural heritage across the county.



Windsor Castle

Festivals & events

Headlined by Reading Festival and Royal Ascot, both with national profiles, and supported by the Parallel Windsor Festival with its potential to become a national exemplar for accessibility, LaplandUK drawing regional visitors out of the main season and regular race days at the county's three racecourses, the county's festivals and events product is strong.



Lapland UK, Bracknell

Family experiences

A key product for visitors from regional England anchored by LEGOLAND Windsor, the product for families is strong and spread right across the county. It includes Go Ape, The Look Out Discovery Centre, Reading Museum, the Museum of English Rural Life, Beale Wildlife Park, the Living Rainforest, Coral Reef Waterworld, The North Wessex Downs National Landscape and a range of nature-based and water-based activity centres. There is an opportunity present the county as a great day out or short break. Family-friendly accommodation may be a gap, in particular non-serviced options.



Countryside, rivers and canals

There is an opportunity to differentiate Berkshire's countryside using the special characteristics of the North Wessex Downs, The Thames Path, the Kennet and Avon Canal and Swinley Forest to define a rural visitor experience. Vineyard tours and equestrian experiences are rooted in the landscape of the county and its racing heritage and have potential for visiting couples. Many of the county's nature- and water-based activity centres can be promoted as hubs for families and youth and special interest groups. The county's waterways are well served by riverboat operators for leisure trips and leisure add-ons for business visitors.



Screen tourism

The presence of a cluster of film studios, filming locations appearing in well-known film and TV productions and the presence of the Berkshire Film Office for coordination and expertise are the ingredients for new visitor products that will appeal to all segments in all markets. Screen tourism is growing worldwide and has been at the centre of a major two-year international campaign led by VisitBritain.



PARTNERSHIP

The achievement of Local Visitor Economy Partnership status is a milestone for the county and an opportunity to provide increased coordination and support for the tourism industry. It also brings the county into closer partnership with VisitEngland and VisitBritain.

The LVEP Partnership provides a mechanism for discussion, debate and decision taking. Its place within the structure of the Berkshire Prosperity Board provides it with a mandate to lead the sector and a position from which to build relationships with and influence sectors that are not directly involved in tourism but have an impact on its future. It also provides the sector with access to knowledge, support and potential funding streams.

The Berkshire LVEP will be responsible for championing and overseeing the delivery of this framework. It will be delivered by the LVEP partners in roles that flow from their core remit, knowledge, experience and skills. Tables 5 & 6 describes key roles for some of those organisations and how the partnership fits together.

Working with destination and organisations beyond Berkshire's borders is essential for success. Existing partnerships with Tourism South East, GWR, Heathrow Airport, London & Partners, Great West Way will be maintained and developed. New partnerships with bordering LVEPs such as Experience Oxfordshire will be developed.



Tours 2 Order guiding in Reading Abbey Ruins

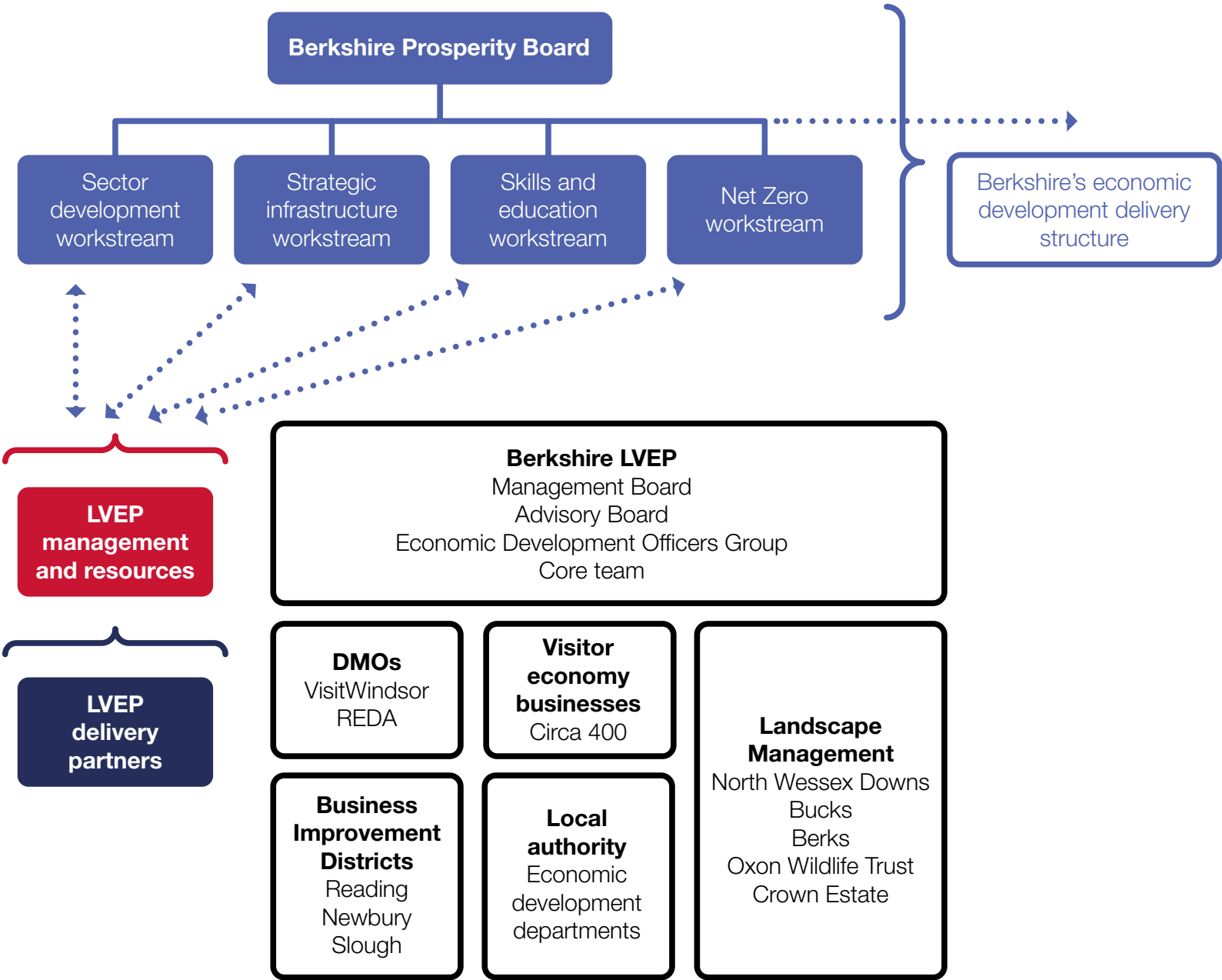


Changing of the Guard, Windsor



Table 5 Key roles	Local authorities	DMOs	BIDs	Businesses	Landscape management	Education/ training providers
Sourcing/securing funding	✓					
Programme/project management	✓	✓				
Destination management	✓		✓ (public realm, events)		✓	
Product development	(public realm)		✓	✓	✓	
Visitor experience			✓	✓	✓	✓
Services & facilities			✓	✓	✓	✓ (venues)
Destination marketing	✓	✓		✓		
Local marketing			✓	✓		
Visitor information		✓		✓		
Sector support		✓				
Partnership development & support		✓				
Business support & networks			✓			✓
National/international sector liaison		✓				

Table 6 Structure of the visitor economy partnership in Berkshire



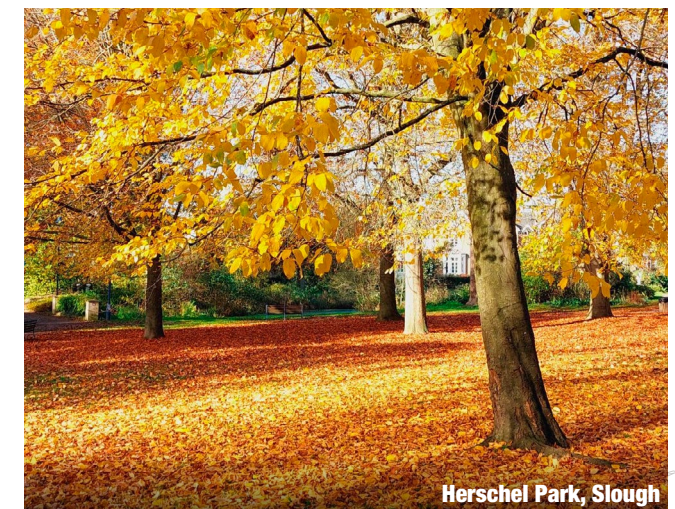
ACTION PLAN

The framework's action plan is high level and suggests the type of activity that will achieve the framework's strategic aim and objectives and that are best delivered by working together. An indication is provided of who might be involved in delivery. This is not definitive.

	Activity	Involved
Deliver an excellent visitor experience	Support employment and skills development by creating pathways into tourism-related careers, fostering partnerships with education providers, and encouraging continuous professional development across the sector	Schools, Further education colleges, Industry
	Upskill the existing workforce to meet visitor expectations	Industry, training and education providers, Berkshire - Berkshire Growth Hub, Chamber of Commerce, local authorities
	Improve the range and quality of visitor information	DMOs, Industry
	Create a quality environment in town centres – services, facilities, appearance, sense of place	BIDs, Local authorities
	Involve communities in visitor economy development	Local authorities, DMOs



	Activity	Involved
Make a tangible contribution to NetZero targets	Improve resource management (energy, water, waste) within businesses	Industry, DMOs, specialist agencies, business networks
	Promote sustainable transport options to visitors	Transport providers, Industry, DMOs
	Improve public transport connectivity for post-arrival travel	Transport providers, local authorities
	Improve facilities to support sustainable car use and sustainable travel options post-arrival	Local authorities, Industry
Spread the benefits of tourism across Berkshire	Inspire visitors pre-arrival to explore more of the county	DMOs
	Provide post-arrival tools for wider exploration	DMOs, Industry
	Equip staff to act as ambassadors and information providers	Industry, DMOs
	Package leisure product for business visits add-ons	Industry, DMOs
	Package big events for overnight stays	Industry
Grow the value of the visitor economy	Grow the volume of meetings and conferences	Venues, hotels, DMOs
	Package and promote short breaks to regional markets	DMOs, industry
	Increase the range of year-round activities and experiences	Industry, Berkshire Film Office, guides



	Activity	Involved
Strengthen the visitor offer	Develop existing/new events with regional appeal	Event producers, landscape management organisations, BIDs
	Improve visitor welcome and information provision at main arrival points	Transport providers, BIDs, DMOs, large attractions, Local authorities
	Describe and promote the distinctiveness of the county's rural offer	North Wessex Downs National Landscape, Berkshire, Buckinghamshire and Oxfordshire Wildlife Trust, DMOs
	Improve the short break potential of the county e.g. greater range of accommodation options	Industry, BIDs, DMOs, Local authorities
	Animate rural Berkshire through product development initiatives	Industry, Local authorities
	Promote accessible and inclusive tourism, engaging businesses with VisitEngland's Accessible and Inclusive Tourism Toolkit and encouraging take up of staff training opportunities.	Local authorities, DMOs, BIDs, Industry.





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