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Royal Borough
of Windsor &
Maidenhead

VISITOR ECONOMY DEVELOPMENT PLAN FOR ROYAL BOROUGH OF WINDSOR & MAIDENHEAD 2024-29



Contents

Executive summary	4
Headlines	5
Introduction	6
Context	7
Situational analysis	8
Destination description	8
Destination performance	9
Visitor segments, markets and marketing	10
Product, services and facilities	11
Connectivity	13
Stakeholder landscape and destination management	14
Analysis of strengths, weaknesses, opportunities, and threats	15
Strengths	16
Weaknesses	16
Opportunities	16
Threats	16
Key issues and considerations	17
Windsor and Maidenhead visitor economy development plan 2024-29	19
Strategic Aim	19
Vision	19
High-level objectives	19
Strategic priorities	19
Market focus	23
Underpinning activity	24
Action plan 2024-29	26
Appendix 1 Summary of product	31
Appendix 2 Contributors to the plan	36

Executive summary

This plan is the blueprint for how Royal Borough of Windsor & Maidenhead (RBWM) intends to develop its visitor economy between 2024 and 2029. Commissioned by VisitWindsor it has been developed by stakeholders from the public authority and the tourism industry with support from local and regional organisations, transport providers and the national tourist board.

An extensive planning exercise has examined where tourism stands today, identified the current issues for both businesses and communities and determined what stakeholders want the future to look like. The result is a plan that responds to a dramatically changed world where the global focus for tourism is sustainability and equality of opportunity. It anticipates participation of the borough in the new tourism management structure in England and addresses the critical issue of funding for destination management and tourism services locally. It describes an approach to visitor economy development that builds on existing assets, focuses on the visitor experience and supports growth.



Headlines

Strategic aim

To increase the value of the Royal Borough's visitor economy in a way that is economically, socially and environmentally sustainable and is supported by residents.

Vision

By 2029 the Royal Borough of Windsor & Maidenhead will be recognised as one of England's most accessible and sustainably managed tourism destinations which celebrates world-class heritage, delivers opportunity to its residents and sees every departing visitor delighted by their experience.

High-level objectives

- Increase the value of tourism by 5% year on year
- Over 75% of the borough's residents supportive of tourism
- Over 85% of visitors rating the borough highly for customer service and quality
- Improved staff recruitment and retention in hospitality sector
- More bedspaces while maintaining high occupancy levels
- Increased levels of businesses with sustainable and accessible accreditation.

Strategic priorities

- Sustainable Windsor and Maidenhead: joined-up transport and sustainable resource management
- Year-round Windsor and Maidenhead: focus on MICE (meetings, incentives, conferences and events)
- Accessible Windsor and Maidenhead: accessible transport and up-to-date and comprehensive information provision
- World-class visitor experience: customer service and improvements to the public realm
- Extending the footprint: product development in rural areas and Maidenhead and joined-up transport
- Employment and careers for all: career paths and an inclusive and positive working environment.

Market focus and segments

Target markets: North America, London and regional England

Market segments: business visits and events, staying leisure visitors, day leisure visitors

Underpinning activity

- Improving data and intelligence: a stronger evidence base and revised performance indicators
- Developing the VisitWindsor Partnership: more members and input from local communities
- Financial stability for the destination management organisation: increased membership contributions and options for a tourism business improvement district.

Introduction

Tourism stimulates economic growth. It provides and maintains jobs for local people and supports a large and diverse workforce with a varied skills profile. It strengthens a wide range of local companies and enterprises and increases their revenue both directly and indirectly. It also supports the facilities and services that provide local communities with a good quality of life. This plan is the blueprint for how Royal Borough of Windsor and Maidenhead intends to develop its visitor economy between 2024 and 2029.

The Royal Borough has had a plan in place for over 15 years. It is renewed periodically to take account of changes in the operating environment, the needs and expectations of consumers and opportunities to develop new products and propositions.

Assessing the impact and influence of previous plans is challenging because of the global hiatus caused by the Covid-19 pandemic. Even so, progress against many of the objectives set in 2017 has been achieved. The number of staying visitors has increased, the number of people working in the sector has grown, new family-friendly products have been developed, more businesses have collaborated to promote business tourism, events have been supported by local ambassadors and the destination has been in the spotlight globally because of a sequence of events related to the Royal Family.

At the same time some ambitions remain unrealised, largely because of the global pandemic shutdown. The balance between day and staying visitors has tipped further towards day visitors, sustainable travel has not been the first choice, or even a possibility, for people visiting and commuting to the borough, data and intelligence has been difficult to source and generate and when it has been produced changes to methodology and incomplete data makes it hard to track performance and measure progress. The pandemic has also affected investment in destination management. Public sector funding for staff and support services has declined and the turbocharging effect of



the pandemic for online selling and purchasing has reduced the opportunities for the service to generate commercial income.

In 2023 a new five-year plan was commissioned by the VisitWindsor board, the public/private partnership that oversees the borough's tourism development and promotion. It has been put together by representatives from the public authority and the tourism industry with support from regional organisations, transport providers and the national tourist board, including staff in VisitBritain's overseas offices.

An extensive consultation exercise has examined where tourism stands today, what the current issues are for both businesses and communities and what they want the future to look like. It has identified a strategic aim, a vision, a small set of high-level objectives and a set of strategic priorities with underpinning activity and an action plan for 2024 and 2025.

The result is a plan that responds to a dramatically changed world where the global focus for tourism is sustainability and equality of opportunity. It anticipates participation of the borough in the new tourism management structure in England and addresses the critical issue of funding for destination management and tourism services locally. It describes an approach to visitor economy development that builds on existing assets, focuses on the visitor experience and supports growth.

Context

The Royal Borough of Windsor and Maidenhead visitor economy development plan exists in a national, regional and local context that is constantly changing.

The most significant factor in recent years for this plan is the climate emergency declared by the local authority in 2019 and its commitment to achieving net zero by 2050. The declaration shapes thinking, planning and action around infrastructure, services and investment for the authority, communities, institutions, organisations and businesses and is central to the borough's strategic plans¹. Many who run tourism businesses and manage tourism assets share a commitment to a sustainable future and this is reflected in their own strategies and plans.

Across Berkshire tourism has a lower profile in strategic planning though the priorities of the Thames Valley Berkshire Local Enterprise Partnership – connectivity, collaboration, and skills – all have a tourism dimension. Regionally there is alignment between Windsor and Maidenhead and the themes of London's 2030 Tourism Vision which are sustainability, social responsibility, accessibility, data, and digitalisation.

Nationally, the priority for tourism is increasing the sector's productivity, though sustainability is also a strong theme. VisitBritain's mission is to make the sector more productive by growing its value and dispersing inbound visitors across Britain. Work is starting on a new strategy for VisitEngland which is scheduled for completion in late 2024 or 2025. At government level, tourism has enjoyed a slightly higher profile than in recent years, due to the pandemic. The national tourism recovery plan published in 2021 focuses on volume and value, spreading the benefits of tourism, increasing the productivity, innovation and resilience of the sector, its contribution to conservation of the natural and historic environment, accessibility and inclusion and boosting business tourism. In practice, however, many decisions, for example on visas and tax, are negative factors for the recovery and growth of Britain's visitor economy.



1 Royal Borough of Windsor & Maidenhead Transformation Strategy 2020-25, Royal Borough of Windsor & Maidenhead Environment and Climate Strategy 2020-25, Local Transport Plan 2012-2026, Royal Borough of Windsor & Maidenhead Corporate Plan 2021-26.

Situational analysis

Destination description

The Royal Borough of Windsor and Maidenhead is a geographically small destination that punches far above its weight in its contribution to the profile and value of UK tourism. A cluster of heritage, family and sporting attractions that enjoy international reputations makes the borough a destination capable of motivating people to travel from significant distances for sightseeing, experiences, and events.

The presence of The LEGOLAND® Windsor Resort, Ascot, Eton and Windsor Castle and Windsor Great Park, both closely associated with the Royal Family, within a 79-square-mile area makes it almost unique to locations within 30 miles of central London in terms of visibility and pulling power. For regional and local visitors, the borough is attractive not only for its high-profile assets, but also the collection of picturesque towns and villages connected by the River Thames, itself a significant landscape feature, and its high-quality countryside epitomised by Windsor Great Park, which complements the world-class built heritage offer.

Proximity to London and Heathrow has attracted a significant number of international HQs which provide corporate business for many of the area's high-quality hotels and venues. Meetings, incentive trips, conferences and events are an important component of the borough's tourism industry.

The Royal Borough enjoys enviable levels of connectivity to London and to key regional and national destinations via the strategic road and rail networks. Its proximity to Heathrow and London translates into a significant inbound market for the borough. Connectivity to the capital has been strengthened by the Elizabeth line, which provides fast and regular train travel into Maidenhead from central London.



Destination performance

Within the borough, tourism is one of the top two economic sectors. By 2021-22 it recovered from the Covid-19 pandemic to reach a value of £743m¹ exceeding pre-pandemic figures (2019) by £137m. The sector is estimated to support 8133 jobs in the visitor economy and an additional 3298 non-tourism related jobs. 12.2% of the borough's population are employed as a result of tourism². Out of 9375 businesses 1625 are tourism businesses³. An average of £48.75m was spent by visitors in the local economy every month in 2021-22⁴.

The balance of day to staying trips remains heavily tilted towards day visits. Despite their lower volume, staying visits account for almost a third of all visitor spend (Figure 1).

Figure 1. Volume and value of day and staying visitors

Trip type	Volume	% of total trips	Spend £m	% of total spend
Day visits	12.19	95.7	406	69
Staying visits	0.54	4.3	179	31

Windsor is already one of the UK's top-ranking tourist towns when measured by the volume of overnight stays by international tourists though having regularly appeared around the top 20, post pandemic it has slipped to 31st place. Regionally, Windsor was listed 4th of named places for the number of international visitors in 2022, behind Oxford, Brighton & Hove, and Southampton. For several years, Windsor has topped national 'best for' destination lists. Windsor Castle and Windsor Great Park both regularly appear in first place on national and regional tables measuring visitor numbers. The rest of the borough does not feature in national or regional listings based on volume of visitors. As concerns relating to sustainability and accessibility grow, forward-thinking destinations will need to respond to refocus on value rather than volume.

When last measured, Windsor exceeded or met the expectations of visitors for its attractiveness, first impressions, cleanliness and welcome⁵. How the rest of the borough is viewed by visitors is not known. Going forward measuring satisfaction will need to look beyond Windsor and standard visitor satisfaction measures to see how the borough scores for sustainability, accessibility and customer service. The availability of comparable data on a regular basis will enable new standards to be set.

- 1 The figure comprises direct business turnover, supplier and income-induced expenditure and the additional expenditure on second homes and by friends and relatives
- 2 Figures taken from Economic Impact Assessment of Tourism in Windsor and Maidenhead 2021-22, Tourism South East
- 3 Source Berkshire Observatory
- 4 Figures taken from Economic Impact Assessment of Tourism in Windsor and Maidenhead 2021-22, Tourism South East
- 5 Windsor Visitor Survey 2017

Visitor segments, markets and marketing

International visitors comprise almost 50% of the borough's total visitors and are largely catered for by private sector companies. They are drawn to Windsor's Royal heritage, visit mostly in high season, and have limited time to explore beyond the hotspots. A large number visit in groups or independently and stay for an hour or two. There is little opportunity to influence them, or the travel trade who facilitate their visits, to change when they travel, how long they stay or where they go.

The destination has a strong MICE market which brings business midweek and in the shoulder seasons and produces a good number of overnight stays. Occupancy is already high midweek throughout the year which limits the potential to grow business from these segments.

The staying leisure market is made up of a mix of international long- and short-haul visitors and domestic visitors drawn to Windsor's attractions as well as country house hotels and spas and high-profile events such as Royal Ascot. Many hotels have lower occupancy levels at weekends and outside the main season suggesting there is room for growth in the staying leisure market. The domestic day market is buoyant and, like other markets, is driven by Windsor's high profile visitor attractions. The wider borough offers opportunities for exploring small heritage and cultural attractions in riverside villages and towns and enjoying the countryside by bike or on foot and is most likely to attract local visitors.

The priority markets for marketing spend are inbound from the US and Northern Europe working through the travel trade. Priority segments for marketing activity are day and staying visits from inbound markets and meetings, incentives and conferences. Attracting the domestic market has been a lower priority for marketing spend on the basis that Windsor's high profile will continue to attract regional visitors and people looking for a day out of London. The 'My Royal Borough' website arose from the pandemic and focuses on a hyper-local market of residents and businesses.



With such a wide range of target markets and the combination of B2C and B2B activity marketing resources are spread thin. Several strategic memberships and partnerships are paid for to provide market access that would be difficult to achieve otherwise. Alongside these the focus is owned channels, i.e. Windsor.gov.uk, Enewsletters, social media, and earned channels via media & PR, including content distribution to third parties. B2B buyer visits and B2B&C media visits are supported by visitor economy businesses and a retained PR support function.

The current approach to marketing is maintaining visibility in inbound markets through trade engagement, managing media interest and providing inspiration and information via the destination website. Proof of effectiveness and business value is increasingly challenging to demonstrate. Going forward the approach will need to be more targeted, cost effective and deliver maximum impact for reduced spend.

Product, services and facilities

Worldwide, the catalyst for developing the most successful destinations is a major tourist attraction which people want to travel to see. “There are several resources that must be present for a place to be effective as a tourism destination, but it is visitor attractions that play the most important role.”¹ The borough is fortunate to have one of the country’s most high-profile visitor attractions in Windsor Castle. This is the engine that drives international visits and, alongside The LEGOLAND® Windsor Resort, Ascot Racecourse and Windsor Great Park, generates the majority of leisure visits from both international and domestic markets. The Castle’s closure two days a week since the pandemic has been felt by many businesses in Windsor town.



The number of high-profile events and festivals, the Tweenage family offer where Adventure Play adds a new dimension, and ‘Royal’ connections e.g. closer access to Guard change than central London are all part of the borough’s appeal². The supporting cast of smaller heritage and cultural attractions, open spaces and Thames-side villages and towns have yet to reach their full potential to attract visitors to the borough but are nevertheless important and a good foundation to grow a critical mass of visitor product outside of the borough’s honeypot locations.

The borough has product strengths that are suited to MICE markets specifically meetings and conferences. A good number of 5* hotels with meetings space, the presence of company HQs in the surrounding area, proximity to London and Heathrow and the reputation of the borough for quality and an attractive environment are all positive factors. However, occupancy is high and the potential for growth is limited. They are also important assets for the incentive market, weddings and special events which benefit additionally from the presence of luxury/fine dining/exclusive-use venues and special experiences.

1 Visitor Attractions - City resources for tourism John Ebejer, University of Malta. Oct 2023
2 A product audit is provided in the appendices.

Product gaps are present across the borough and affect the length of stay, the type of visitor attracted to the borough and the ability of visitors to enjoy the borough to the full. They include:

- leisure cycling infrastructure including cycle hire and secure storage
- the retail offer in comparison with nearby centres
- the evening economy in Windsor and Maidenhead
- the cultural offer which mainly serves a hyper-local audience
- alternate types of self-catering accommodation (e.g. glamping, eco-pods) that are present in surrounding counties and are suitable for families
- the ability to move around the borough easily without a car
- midweek bedspaces for the MICE market
- a venue capable of hosting medium sized conferences.



The ability to book a trip to the borough independently pre arrival is made possible by a high level of online booking functionality for individual hotels, attractions and hospitality businesses either directly or through many of the global online booking sites. Windsor is included in the portfolios of many OTAs and travel trade companies operating out of London. It is most often packaged with Stonehenge, Bath and Oxford and other internationally known locations in the South of England. This delivers visitor volume rather than value to Windsor and very little measurable business to the rest of the borough.



Connectivity

The borough enjoys enviable levels of connectivity to London and to key regional and national destinations via the strategic road and rail networks.

13 rail stations bring people into the borough with those in the visitor hub of Windsor connecting to London in under an hour. Connectivity to the capital has been strengthened by the Elizabeth line, which provides fast and regular train travel from the centre of London to Maidenhead and stops in Slough on the borough's northern border.



Proximity to London and Heathrow translates into a significant inbound market. Bus connectivity between Heathrow and Windsor has recently been enhanced filling a gap. The M4 which skirts around and through the borough connects Windsor and Maidenhead with the national motorway network.

Travelling into the borough is relatively easy but travelling around post arrival without a car is challenging. Bus travel is, understandably, oriented towards residents but this makes it difficult for visitors to arrive by rail and visit for example The LEGOLAND® Windsor Resort or explore Thames-side towns and villages. The issue is often lack of information about making connections between rail and bus as much as the scheduling of services. Many local and regional visitors will decide to visit by car rather than try to navigate a commuter- and resident-oriented transport network.



Stakeholder landscape and destination management

In 2020 a new public/private partnership, VisitWindsor, was created to provide a forum for discussing and developing the borough's visitor economy. It comprises a board of senior representatives from the accommodation, hospitality, experience, attraction, retail, film production and transport sectors. The local authority is represented by elected members and senior staff and it is chaired by the private sector. A membership of over 100 visitor economy businesses contributes financially and in-kind to support the VisitWindsor initiative. A small staff team is funded by the local authority and supports several sector-specific stakeholder groups including VisitWindsor Partnership Accessibility Subgroup, the MICE marketing group and the visitor attractions group.

Two town centre forums in Windsor and Maidenhead and town managers for Windsor, Eton & Ascot and Maidenhead are a positive addition to the stakeholder landscape and could become active contributors to visitor economy development. The borough does not, currently, have town centre Business Improvement Districts (BIDs).

Going forward, funding for VisitWindsor is under threat. The Visitor Information Centre is already facing closure. New thinking is required about how the destination management service is funded if it is to survive. The new national approach to tourism management presents an opportunity. Work is already underway across Berkshire to explore the option of local authorities collaborating to become a Local Visitor Economy Partnership, a second-tier destination management organisation within a three-tier hierarchy that is being rolled out nationally by VisitEngland.



Analysis of strengths, weaknesses, opportunities, and threats

Stakeholders involved in producing this plan have looked at the destination holistically from the perspectives of visitors, businesses and residents. An assessment has been made on the degree to which visitor expectations are met and what needs to be improved to provide a visitor experience that matches the borough's high quality built and natural heritage. Infrastructure, the product offer, quality and visitor facilities have been debated in workshops and interviews. Strategic priorities have been tested and shaped using a stakeholder questionnaire and input from the VisitWindsor board. The impact of tourism on residents has been considered and stakeholders have defined what sustainability and accessibility means for the sector. Markets and visitor segments have been assessed for those that are most likely to deliver sustainable growth. Issues around resources for destination management and marketing have been highlighted as a significant challenge.

The output is an assessment of the borough as a visitor destination in 2024 presented as narrative and in Figure 2 in the traditional format of a SWOT.



Figure 2. SWOT of tourism in the Royal Borough of Windsor & Maidenhead

Strengths	Weaknesses
<ul style="list-style-type: none"> • World-class built heritage • Family attraction anchor • Five-star hotels and country house hotels for leisure and business tourism • Train connectivity to London • National connectivity via rail and motorways • Proximity of Heathrow for international visits • High quality natural environment • River Thames for recreation and leisure • Bray and Cookham for gastronomy and culture • High-profile events e.g. Royal Ascot • Strong events calendar for regional audiences • Supporting services in Windsor e.g. left luggage, tour guides • Examples of best practice in larger businesses on sustainability and accessibility • Good bookability for majority of visitor economy businesses • Good visibility for the key assets on third party promotion platforms • VisitWindsor team. 	<ul style="list-style-type: none"> • Dominance of Windsor • Limited visitor product in rural areas • Limited visitor product in Maidenhead • Limited evening economy for visitors • Underdeveloped cultural offer for visitors • Limited experiential product • Limited venues for medium sized conferences • Underwhelming gateways • Visitor signage in some locations • Information for visitors on transport options and accessible facilities • Facilities to support sustainable travel • Unfriendly visitor parking policy • User issues with Ringo parking app • Knowledge/understanding of frontline staff on accessibility • Inconsistent standards of customer service • An underdeveloped evidence base for decision making • Low level of private sector engagement • Restricted opening times for some heritage attractions.
Opportunities	Threats
<ul style="list-style-type: none"> • River Thames for product development • Parallel Windsor event, an example of best practice • Boutique film production facilities • MICE markets, specifically meetings, incentives and small/medium scale conferences • Small scale group visits • Regional family market • Achieving Local Visitor Economy Partnership (LVEP) status • Private/public partnership (VisitWindsor) • Windsor and Maidenhead town centre forums • A Tourism Business Improvement District to fund destination management. 	<ul style="list-style-type: none"> • Reducing budget of the local authority • Lack of resource (human, financial) to realise opportunities • Windsor residents negative about tourism • Difficult to influence group operators bringing volume rather than value • Retail competition in Reading, Bracknell, etc.

Key issues and considerations

The situational analysis and the SWOT highlight key issues and considerations for the borough. Many are long standing and have been included in previous plans.

The overarching challenge is responding to the climate emergency and ensuring that the visitor economy develops in a way that is sustainable in the long term. This requires a more proactive approach than in the past and involves keeping the needs of visitors, residents and business in balance, ensuring that the principles of inclusion and equality of opportunity are embedded across the sectors' business practices and taking care of the borough's heritage assets and natural landscapes which are the foundations of its visitor offer.



Sustainability and accessibility have been discussed in depth and interpreted by stakeholders to suggest where the emphasis should be placed over the period of the plan. For sustainability it is threefold: joined-up transport to support use of public transport and facilitating more active travel options; better management of resources to help achieve net zero; and protecting and enhancing the borough's green assets. For accessibility it is twofold: making all visitors feel welcome, ensuring as much as possible that their needs are met, specifically accessible travel and transport options and improvements in the public realm; and improving equality of opportunity and diversity in the visitor economy workforce.

Other specific considerations, many of which build on the interpretation of sustainability and accessibility, include:

- Changing visitor patterns to relieve the pressure of large numbers in some locations in high season and reduce negative impact on residents. Related to this is improving the quality of the visitor experience for those visiting at peak times and encouraging visitors to explore more of the borough.
- Improving information and removing physical barriers for visitors with accessibility needs so that they receive a warm welcome and have a positive experience.
- Addressing the challenges that hospitality businesses face in recruiting and retaining staff which can affect customer service and business profitability. Linked to this is improving the understanding of the career and employment opportunities offered by the sector.
- Ensuring that the image and reputation of the borough is not undermined by inconsistent quality across the public realm with a specific focus on gateways.
- Providing visitors and sector workers with sustainable transport options to reduce reliance on car use.

- Improving the quantity and quality of data and intelligence for all stakeholders to support decision making.
- Finding a mechanism for local communities to be more involved in visitor economy development.
- Providing greater funding security for the borough's destination management function so that it can facilitate and support delivery of the visitor economy development plan.
- Responding to this assessment, the new plan identifies an aim and a vision, objectives and six strategic priorities that will help meet the challenges and opportunities ahead. Three additional activity areas underpin the strategic priorities and are essential to future success. An action plan for years 1 and 2 of the plan provides a set of detailed actions and suggests organisations that should lead.

Many of the actions in the first two years will lay foundations for future development while others build on existing initiatives and assets. Some will scope options and possibilities with findings fed into regular revisions of the action plan. The visitor economy plan will be revisited and updated midway through its lifetime.



Windsor and Maidenhead visitor economy development plan 2024-29

Strategic Aim

To increase the value of the Royal Borough's visitor economy in a way that is economically, socially and environmentally sustainable and is supported by residents.

Vision

By 2029 the Royal Borough of Windsor & Maidenhead will be recognised as one of England's most accessible and sustainably managed tourism destinations which celebrates world-class heritage, delivers opportunity to its residents and sees every departing visitor delighted by their experience.



High-level objectives

- Increase the value of tourism by 5% year on year
- Over 75% of the borough's residents supportive of tourism
- Over 85% of visitors rating the borough highly for customer service and quality
- Improved staff recruitment and retention in hospitality sector
- More bedspaces while maintaining high occupancy levels
- Increased levels of sustainable and accessible accreditation.

Strategic priorities

1. Sustainable Windsor and Maidenhead

Rationale	Stakeholders across Windsor and Maidenhead have been working unilaterally on sustainability in a variety of ways, but this plan puts the agenda centre stage. Achieving a sustainable balance between the interests of visitors, residents, businesses and the built and natural environments will in future underpin how the borough thinks about tourism development and influence the actions it takes.
Five-year focus	The primary focus will be on sustainable travel options for visitors and a responsible approach to resource management.

2. Year-round Windsor and Maidenhead

Rationale	Seasonality is a key issue for sustainable growth and a challenge for most destinations worldwide. It affects the profitability of tourism businesses, the employment security of staff and brings large numbers of visitors to key locations and at key times which can negatively affect the resident population. Looking ahead the borough will redouble its efforts to produce a more even pattern of visits.
Five-year focus	<p>The primary focus will be developing MICE markets that deliver higher-value business midweek and in the shoulder seasons. The borough needs more bed spaces and ideally a larger meeting venue that can support medium scale conferences.</p> <p>Building on the Meetings and Events website and strategic partnerships the MICE marketing group will develop a more targeted B2B marketing programme that utilises business ambassadors and relationships with company HQs. The borough is already an incentive destination. It needs to bring the product together and market it effectively to really establish a reputation as a regional, national, and international incentive destination.</p>

3. Accessible Windsor and Maidenhead

Rationale	In recent years the Parallel Windsor event has won awards as an exemplar event that celebrates disability, inclusion, and wellbeing. It has the potential to become a national example of best practice and act as a catalyst for increasing the accessibility of the borough for visitors.
Five-year focus	The primary focus will be on improvements to the public realm, provision of information and front-of-house training. In the public realm the aim is to make it easier for visitors to move around and navigate the borough so that they can enjoy more of what the destination has to offer. Increasing the amount of accessibility information available to visitors will help them make informed choices about where to go, what to see, and how to travel, confident that when they arrive they will be welcome and that their needs can be met. Training will increase awareness of disabilities of all kinds so that frontline staff can deliver extra help when it is needed.

4. World-class visitor experience

Rationale	<p>Since the last visitor survey in 2017 the interruption of the Covid-19 pandemic, staff churn in hospitality businesses and the difficulty of recruiting and retaining staff have brought new workers to the sector who may need support and training to deliver world-class service. These factors, coupled with rising consumer expectations and the impact that customer service and the overall visitor experience can have on the reputation of a destination, suggest that continual improvement is a necessity for a destination that wants to remain competitive.</p>
Five-year focus	<p>The primary focus will be on high quality and consistent customer service and the quality of the public realm. Training for frontline staff will help them add value to the visitor experience and respond to the needs of visitors with accessibility needs. The existing quality of online visitor information and the ability to plan and book pre and post arrival will be maintained to meet the customers' expectations.</p> <p>Public realm improvements at points of arrival will convey a better sense of place and ensure that first impressions match up to the reputation of the borough's world-class built heritage and natural environment.</p>

5. Extending the visitor footprint

Rationale	<p>Developing products outside Windsor, Eton and Ascot will help to alleviate crowding and congestion in these hotspots and spread the visitor pound more widely to the benefit of businesses in rural areas and Maidenhead. The raw ingredients are present in the villages and towns along the River Thames that already have a reputation for gastronomy and culture. The LEGOLAND® Windsor Resort is an anchor attraction from which to develop the offer for families.</p>
Five-year focus	<p>The primary focus will be to develop a critical mass of product in rural areas, including family-friendly accommodation, visitor attractions, hospitality, experiences and the infrastructure to support soft leisure such as walking and cycling. Developing the evening economy in Windsor and Maidenhead will encourage people to stay longer. Convincing regional visitors from London, Surrey, the south coast and along the M4 corridor to consider the borough will require targeted marketing.</p>

6. Employment and careers for all

Rationale	<p>Staff recruitment and retention is a critical issue for the tourism and hospitality sector. It is a national problem that the borough is unlikely to solve on its own. The exodus of EU hospitality workers, competition from other sectors with better rates of pay and conditions, negative perceptions of what it is like to work in the sector, misconceptions around the range of careers that are available and barriers for people with disabilities are all factors that have contributed to the crisis. Difficulties in recruitment add costs to businesses and can affect their ability to deliver a high standard of customer service.</p>
Five-year focus	<p>The primary focus will be working with education providers to raise the profile of working in the visitor economy and expanding the understanding of new entrants to the workplace of the wide range of opportunities that are available in the sector. Business owners will be asked to act as ambassadors for the sector and be supported to take a more inclusive approach to recruitment and consider ways to attract and retain workers through a positive and rewarding working environment.</p>



Market focus

Windsor has a high percentage of overseas visitors. They are attracted by the international reputation of Windsor and the Castle and their visits are facilitated by the travel trade. A large proportion visit in groups for a short time on day trips or short tours out of London. There is little the borough can do to influence this market.

Maintaining the destination's profile (national and international) will be achieved by creating and distributing marketing content to national and regional partners who have the ability to reach and influence consumers worldwide. These include: VisitBritain, London & Partners and key media and trade media outlets.

In terms of proactive marketing activity the borough will focus on three key markets: North America, London and regional England. Regional England is defined as people living in Sussex, Surrey, along the Hampshire coast and the M4 corridor as far as Bath and Bristol and north as far as Oxford and the Cotswolds. Within these markets priority segments are business visits and events, staying leisure visits and day leisure visits. Those listed below have potential to grow and can be influenced with targeted marketing and product development. The leisure segments have been chosen because they have the potential to explore beyond Windsor town.

Business visits from North America, London and regional England

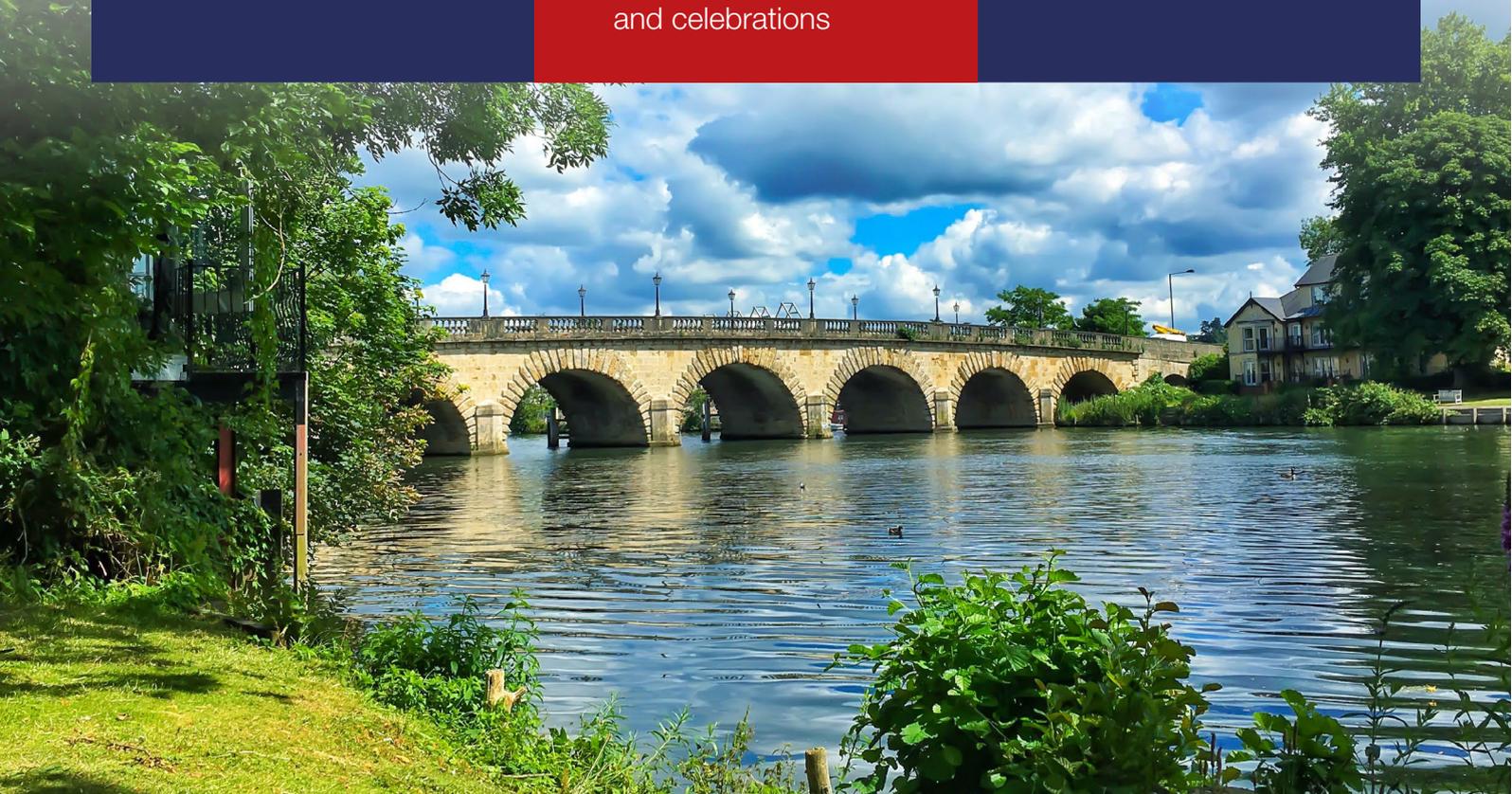
- Small and medium sized conferences
- Corporate meetings
- Training days and events
- Incentive trips

Staying leisure visitors from London and regional England

- Couples attending major events and travelling for short breaks
- Small groups of friends attending major events and celebrations

Day leisure visitors from London and regional England

- Families with older children
- Couples
- Groups of friends



Underpinning activity

Three areas of activity have been identified as central to delivering the visitor economy plan. They will be prioritised for investment in 2024 and 2025. Each area will require investment over and above current resources including VisitWindsor's revenue budget.

a. Improving data and intelligence

Rationale	Lack of data and intelligence means that forward planning, good decision making and monitoring performance can be challenging. The annual economic impact survey is valuable but limited in range and dependant on national data that has been provided inconsistently and retrospectively. The visitor experience was last measured in 2017 and sector-specific information is missing. A VisitEngland-led working group is developing a new approach to data collection and management which might provide a useful framework for the future.
Five-year focus	The primary focus will be to find ways to build a stronger evidence base and update it at regular intervals. Performance indicators will be reviewed and refreshed so that they reflect the strategic priorities identified in this plan and ensure that stakeholders are able to measure and monitor performance and progress over a five-year period.

b. Developing the VisitWindsor partnership

Rationale	Visitor economy development is most successful when the public, private and non-governmental organisation sectors work together in a destination management partnership. The VisitWindsor partnership is growing in strength, but there is more to do to make it a truly inclusive entity that represents the interests of stakeholders across the borough. A strong VisitWindsor will be better able to harness support at regional and national levels and participate in the national approach to tourism management.
Five-year focus	The primary focus will be on strengthening the VisitWindsor partnership, encouraging more businesses from more sectors to contribute financially and in kind and use their knowledge and experience to help deliver the actions set out in this plan. Consideration will be given to strengthening the voice of the community so that residents feel able to influence the development of the visitor economy and contribute to its success.

c. Financial stability for the DMO

Rationale	Destination management organisations (DMOs) act as facilitators, coordinators and delivery agencies playing a central role in destination development and management. The VisitWindsor team, funded and supported by the local authority, are under threat due to budget reductions which are affecting local authorities across England. Without a team of people to perform the destination management role it will be difficult to deliver this plan and make it less likely that the visitor economy partnership will achieve its strategic aim or deliver against its high-level objectives.
Five-year focus	The primary focus will be to explore new ways of creating financial stability for the VisitWindsor team. This will include looking at the viability of a tourism business improvement district, assessing options for a tourist tax, growing the VisitWindsor partnership and working with partners across Berkshire to engage with the new tourism management arrangements across England. Becoming a recognised Local Visitor Economy Partnership could lead to the formation of a regional Destination Development Partnership that can attract government money for tourism management and development.



Action plan 2024-29

Strategic priorities	Action areas	Actions (years 1 & 2)	Lead(s)
1. Sustainable Windsor and Maidenhead	Travel information for visitors	Review and update current information provided by third party sources – businesses, marketing partners, OTAs, etc - to highlight sustainable options.	VisitWindsor team
	Sustainable practices by tourism businesses	Identify and agree up to three areas for improvement. Signpost businesses to practical resources and accreditation schemes. Develop sustainable case studies. Establish an annual sustainability conference.	tbc Local authority climate team/ VisitWindsor team
	Strengthened links with local producers	Audit the VisitWindsor membership to source information on local suppliers of goods and services. Add a supplier section to the VisitWindsor website. Establish an annual sustainability conference.	tbc Local authority climate team/ VisitWindsor team

Strategic priorities	Action areas	Actions (years 1 & 2)	Lead(s)
2. Year-round Windsor and Maidenhead	Growth of MICE markets	Develop a comprehensive B2B marketing programme to raise the profile of the borough's meetings and conferencing offer. Continue to develop the content on MICE website. Develop a set of business extender 'Bleisure' programmes.	MICE marketing group/VisitWindsor team
	Inward investment to increase bed spaces	Provide a comprehensive picture of development plans in existing accommodation providers. Scope options for 1-2 mid-range or high-end hotels.	RBWM economic development team
	Increase the capacity of meeting spaces	Scope options in existing venues for increased capacity.	RBWM economic development team working with venues
3. Accessible Windsor and Maidenhead	Training for frontline staff	Promote AccessAble as an information resource and use it as a resource for a new Windsor Welcome programme.	VisitWindsor accessibility subgroup
	Information for visitors	Maintain and develop the borough's information on AccessAble. Promote AccessAble to visitors online.	VisitWindsor accessibility subgroup
	Support for physical adaptations	Identify financial support for physical adaptations and promote to visitor economy businesses as part of a new Windsor Welcome programme.	tbc
	Developing an exemplar event	Develop a case study for the Parallel Windsor event as an example of good practice and communicate it widely including via VisitBritain's accessibility champion.	Parallel event producers

Strategic priorities	Action areas	Actions (years 1 & 2)	Lead(s)
4. World-class visitor experience	Training for frontline staff	Develop a new Windsor Welcome programme that embraces sustainability, accessibility, customer service and a sense of place.	VisitWindsor team
	Customer service charter	Develop a customer service charter and attach it to the residents' Advantage card.	Advantage scheme manager
	Quality and management of arrival points and public realm	Complete redesign of Windsor Coach Park. Review Ringo and ensure it is suitable for visitors. Identify timetable of refurbishment programmes in town centres and influence delivery from visitor perspective.	Local authority teams
	Digital information for visitors	Create and implement a content distribution strategy aimed at all third party marketing partners and information providers.	VisitWindsor team
5. Extending the visitor footprint	Product development in rural areas	Develop Maidenhead's cultural and retail offer for local and regional visitors. Package existing rural product for local and regional visitors.	Maidenhead TC forum/TC manager
	Attract and disperse initiative for high season	Develop a privilege card for visitors (a version of the Advantage card) and utilise the opportunity presented to disperse visitors in high season. To include rail and bus travel.	VisitWindsor team/Advantage scheme manager
	Marketing to local and regional audiences	Review the destination marketing strategy and plan for both VisitWindsor and reorient towards local and regional audiences. Develop My Royal Borough (hyper-local residents and businesses) to provide a B2B online resource for VisitWindsor members and to promote the visitor economy to residents.	VisitWindsor team
	Maintaining destination profile	Create and implement a content creation and distribution strategy aimed at all third party marketing partners and information providers.	VisitWindsor team

Strategic priorities	Action areas	Actions (years 1 & 2)	Lead(s)
6. Employment and careers for all	Connecting industry with education	Develop an industry/education liaison group at VisitWindsor board level.	VisitWindsor board
	Support for business owners	Scope a campaign to promote working in tourism and hospitality. Develop a programme aimed at visitor economy business owners that includes Living Wage accreditation, inclusive recruitment practices and staff retention initiatives.	RBWM economic development officer
	Extension of ambassador programme	Develop the visitor-facing ambassador programme to identify business champions for employment and careers in tourism.	VisitWindsor board

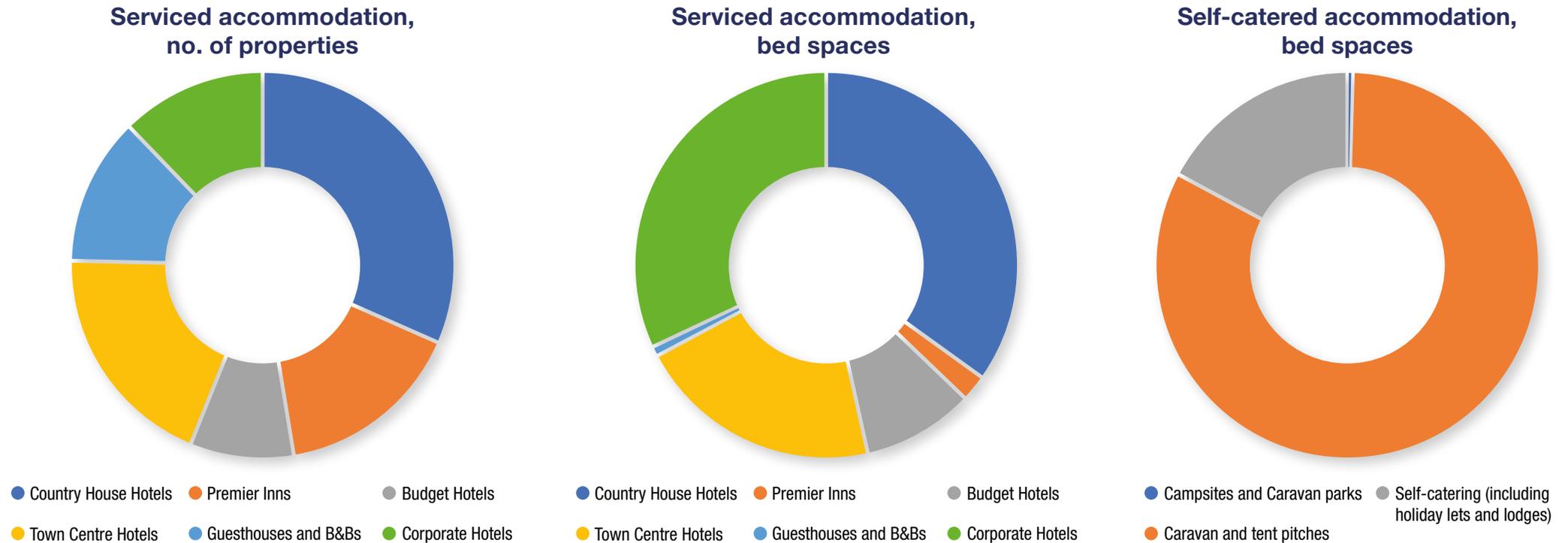
Underpinning activity	Action areas	Actions (years 1 & 2)	Lead(s)
a. Improve data and intelligence	Primary research	Review current plans and establish a three-year rotating programme of primary research that covers economic impact, visitor satisfaction and sector-specific studies.	VisitWindsor team
	Secondary data	Audit hotel data on occupancy and explore ways to share it more widely for planning purposes.	VisitWindsor board/Thames Valley regional hotel sales group
	Performance indicators	Develop a set of performance indicators and ways to measure them with an emphasis on sustainability and accessibility.	VisitWindsor board

Underpinning activity	Action areas	Actions (years 1 & 2)	Lead(s)
b. Developing the VisitWindsor partnership	VisitWindsor partnership	Grow the membership and explore joint membership with town partnerships. Identify thematic championing roles for board members for sustainability, accessibility, careers, employment and community engagement. Build board capacity to focus on strategic priorities.	Windsor and Maidenhead TC forums/VisitWindsor board/TC managers
	Regional engagement	Work with partners across Berkshire to develop a Local Visitor Economy Partnership application and, if relevant, a destination development partnership.	VisitWindsor board
	National support	Build on the existing relationship with VisitEngland's regional lead for South East England to secure support for the borough's aims and objectives.	VisitWindsor board
c. Financial stability for the DMO	Tourism BID	Scope the options for a Tourism BID in the borough.	VisitWindsor board
	Tourist taxes	Review options for differential pricing of key services for tourists and residents. Explore options for voluntary contributions from visitors. Assess the feasibility of a range of tourist taxes.	Local authority
	Commercial activity	Increase the VisitWindsor membership.	Windsor and Maidenhead TC forums/TC managers

Appendix 1 Summary of product

Accommodation

Serviced accommodation 57 properties, 4500 bedspaces. Self-catered accommodation 44 properties, 3 agencies with multiple properties each plus 212 caravan and tent pitches.



There are four 5* and ten 4* hotels in the borough meaning 25 percent of the hotel stock is 4* or above. There is one 5* campsite. The borough does not appear to have alternative accommodation options that are present in many other rural areas in England e.g. yurts, shepherds' huts, eco-pods.

Venues

Many of the borough's hotels and attractions double up as venues for corporate meetings, small scale association conferences and wedding business. Incentives is also a market for many of the borough's special properties. Hotels on the fringes of the area are included in the product count because they attract business that has a positive impact on Windsor and Maidenhead.

- Five sports venues that hold meetings, including Ascot Racecourse
- 20 hotels with meetings facilities
- Three meetings venues

Plus Great Fosters, Royal Holloway (University of London), Moor Hall, a private members' club and two boat operators.

Visitor attractions

74 visitor attractions with strengths in heritage and family friendly.



Heritage – highest profile and key driver of the borough's visitor economy is Windsor Castle supported by circa 13 smaller attractions including heritage-themed walking tours, historic houses, historic buildings of note. Key locations are Windsor and Eton.



Family – highest profile and key driver of the family market is The LEGOLAND® Windsor Resort supported with 16 family-oriented attractions and experiences including bus tours, boat tours, themed tours, mini golf courses, nature centres and play opportunities. Product is present across the borough.



Culture – plays a significant supporting role with 10 venues including galleries, museums and performing arts spaces, a brewery and an arts centre. Key locations are Windsor and Eton plus Cookham.



Landscape and countryside – the borough has a large number and range of landscapes and countryside locations with visitor appeal. Windsor Great Park and the Thames Path National Trail are its most high-profile assets with a further 25 named islands, parks, riverside gardens and walks. The River Thames runs through the borough and is its most significant natural feature. The borough has one paid-entry garden – Waltham Place – and two on its doorstep – The Savill Garden and Cliveden. National Trust properties are found just outside the borough boundaries. Product is found throughout the borough.



Walking and cycling – The Thames Path National Trail and national cycle routes 4, 50 and 61 run through the borough. The Jubilee River, Eton Dorney, the Thames Valley cycle route are the best known alongside the Long Walk in Windsor Great Park. They are supported with many scenic local routes across the area.



Towns and villages – a series of picturesque towns and villages, many on the banks of the Thames, provide points of interest throughout the borough as well as offering places to eat, shop and explore. Some have high-profile cultural, sporting or heritage assets including the Stanley Spencer Gallery in Cookham, Ascot Racecourse in Ascot and Eton College Museums in Eton.

Activities



Water-based activities are a strength: from river cruises on the Thames with French Brothers to a range of rowing, canoeing, kayaking and paddleboarding opportunities. Two companies offer boat charters. Main venues: Upper Thames, Bray Lake, Dorney Lake, Taplow Lake, Maidenhead, Eton.



Visitors can play golf at a range of clubs around the borough. Main locations: Maidenhead, Datchet, Ascot, Sunninghill.



In addition to watching polo visitors can book polo experiences at Guards Polo Academy, Emsworth Polo Grounds and The Royal Berkshire.



Land-based activities include horse riding, segway, and mountain biking. Flight experiences are offered at White Waltham Airfield.



Walking and cycling is well provided for. Windsor Great Park and the Thames Path National Trail are its most high-profile walking and cycling areas/routes with a further 25 named islands, parks, riverside gardens and walks. The River Thames runs through the borough and is its most significant natural feature.



Major events and festivals

There are 23 events of note in the annual calendar with visitor appeal, a handful of which are internationally famous. Windsor Castle is the location for significant Royal events which happen ad hoc. In the last few years there have been a string of events that have brought international attention to the town.



Cartier Queen's Cup Final,
Royal Ascot, King George
VI Weekend, Royal
Windsor Horse Show



Fi.Fest, Festivo,
Windsor Festival,
Maidenhead Festival



Windsor on Ice,
Panto Theatre Royal,
Fringe Festival



Royal Windsor Triathlon,
Windsor Half Marathon



Garter Day



Windsor Great Park
Illuminated



Swan Upping (Eton to
Cookham)



Windsor Food
Festival



Royal Windsor
Flower Show



Parallel Windsor (festival
of inclusivity)



Windsor
Championship Dog
Show



Hospitality and retail



13 restaurants appear in the Michelin Guide and five have Michelin stars, with two more on the border in Marlow. One restaurant has 5 AA rosettes, one 4 AA rosettes and a further 18 have between one and three AA rosettes.



87 pubs are listed in the Good Pub Guide: 50 in Windsor, 30 in Maidenhead, with the remainder in Old Windsor or Cookham. Of these, nine are tagged 'worth a visit'. There are none in the 'recommended' category.



A minimum of five products hold a Great Taste Award.



Six independent companies hold a Royal Warrant including Darvilles and Windsor & Eton Brewery with two more on the border in Slough.

Visitor services and facilities



Two visitor information centres; Eton and Windsor.



One coach park including pick up and drop off.



At least five Blue Badge guide companies.



Three park-and-ride facilities.



Five long stay car parks. All car parks are pay and display on arrival. The most visitor-friendly type of car park is pay on exit.



Appendix 2 Contributors to the plan

David	Andrews	The Great West Way
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Katie	Axford	Great Western Railway
Nicola	Bell	RBWM
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Amanda	Bryett	Windsor Tourist Guides Ltd
Cllr David	Buckley	RBWM
Helen	Bull	The LEGOLAND® Windsor Resort
Robyn	Bunyan	RBWM
Diana	Butler	Guards Polo Club
Tania	Caiafa	Windsor Guildhall
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Janet	Cole	Royal Collection Trust
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Sarah	Davis	Royal Collection Trust
Nick	Day	The Crown Estate
Fran	Downton	Tourism South East
Steven	Doyle	Côte Brasserie
Stephen	Evans	RBWM
Kevin	Fernandes	Windsor & Eton Brewery
Tom	Flather	RBWM
Linda	Freeman	Canoe & Kayak Adventures
Neil	Freeman	Canoe & Kayak Adventures
Paulina	Gasior	Côte Brasserie
Daniel	Gauld	Ascot Racecourse
Sam	Goss	The Castle Hotel
Joe	Hahnenfeld	Giggling Squid
Peter	Haley	People to Places
Henry	Harris	The Crown Estate
Tony	Howe	Visions of History
Grace	Hudson	Giggling Squid
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Steph	James	RBWM
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Danielle	Knafo	Heathrow Airport
Bobbie	Latter	Bobbie Blue Badge
Katie	Lewis	Windsor Duck Tours
Adam	Logie	John Logie Motorboats Ltd
Melanie	Losfield	Royal Collection Trust
Chris	Lund	Great Western Railway
Simon	Maples	Royal Collection Trust
Amy	Martin	Ascot Racecourse
Ramnik	Mathur	Dr Chocs
Rachel	McCaffrey	VisitEngland
Marianne	McGoldrick	The LEGOLAND® Windsor Resort
Jenny	McLaughlin	Heathrow Airport
Bob	Morrison	Windsor & Eton Brewery
Athena	Morse	The Crown Estate
Freya	Nash	RBWM
Greg	Nelson	RBWM
Mark	Persad	The Crown Estate
Caroline	Phelan	VisitBritain
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John	Swift	Fairmont Windsor Park
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Cllr Julian	Tisi	RBWM
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Cllr Simon	Werner	RBWM
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