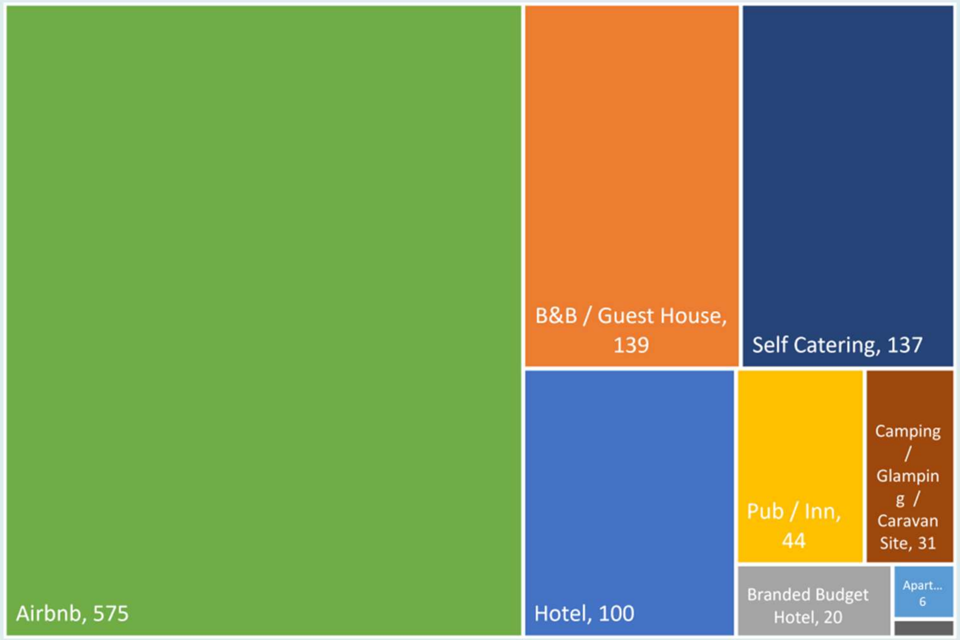
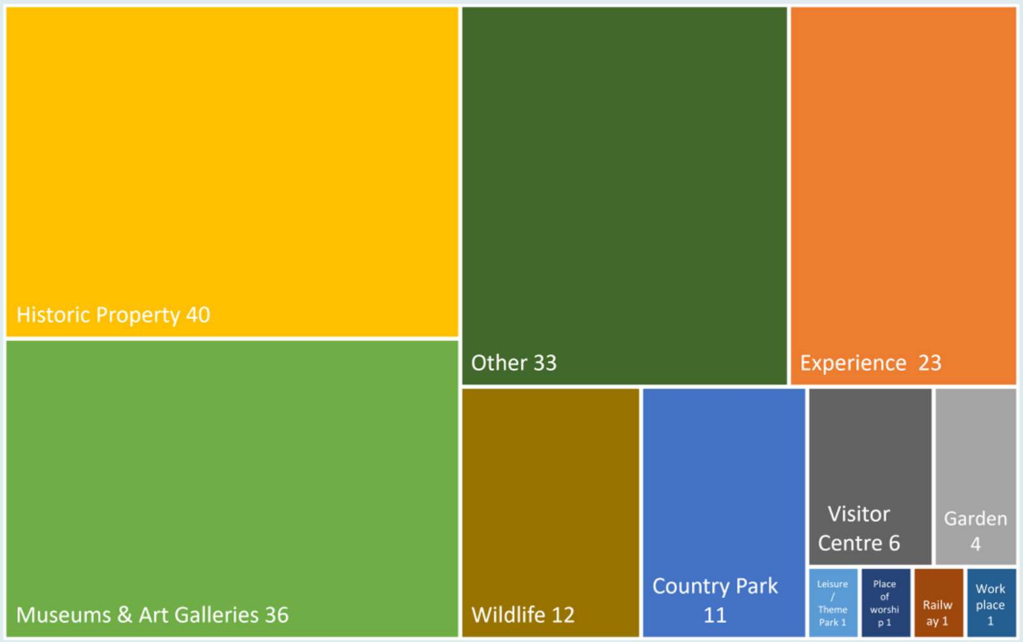
Summary of Core Assets – by Community Board and Type

Table 1 Assets	Accommodation		Visitor Attractions		Restaurants, Café's, Pubs & Clubs		Festivals & Events	
Community Board	**Nos.**	**%**	**Nos.**	**%**	**Nos.**	**%**	**Nos.**	**%**
Amersham	17	4%	9	5%	77	5%	5	4%
Aylesbury	33	7%	16	9%	182	12%	12	11%
Beaconsfield and Chepping Wye	20	4%	3	2%	107	7%	2	2%
Beeches	17	4%	9	5%	76	5%	2	2%
Buckingham and Villages	47	10%	17	10%	93	6%	23	20%
Chesham and Villages	17	4%	9	5%	74	5%	11	10%
Denham, Gerrards Cross and Chalfonts	44	9%	12	7%	99	7%	6	5%
Haddenham and Waddesdon	39	8%	13	8%	108	7%	5	4%
High Wycombe	41	9%	10	6%	145	10%	1	1%
Missendens	17	4%	5	3%	41	3%	3	3%
North West Chilterns	44	9%	26	15%	98	7%	6	5%
South West Chilterns	67	14%	10	6%	139	9%	21	18%
Wendover	24	5%	12	7%	77	5%	5	4%
Wexham and Ivers	9	2%	4	2%	29	2%	4	4%
Wing and Ivinghoe	19	4%	10	6%	58	4%	4	4%
Winslow and Villages	24	5%	4	2%	61	4%	2	2%
Total	**1054**		**169**		**1,464**		**115**	

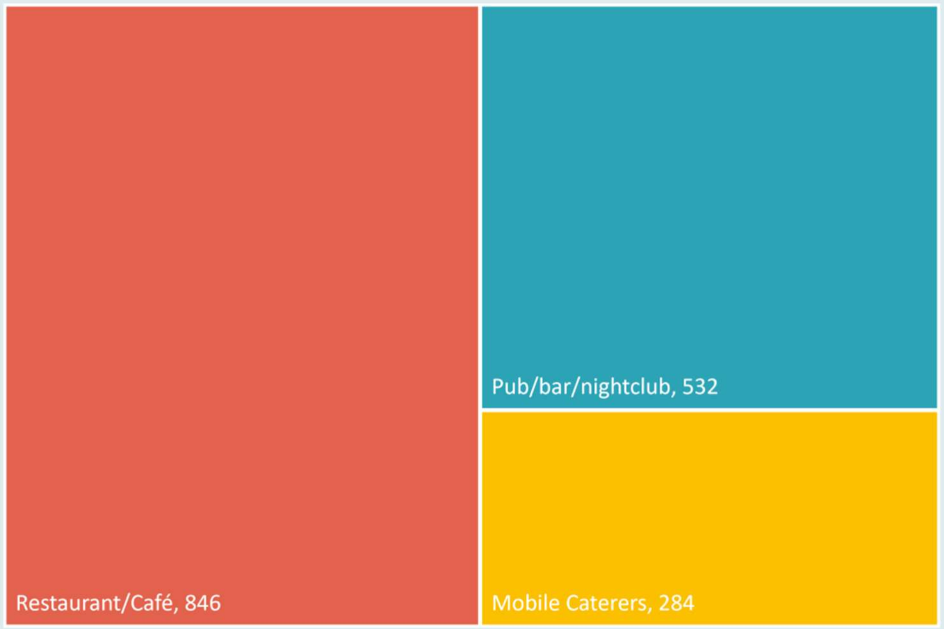
Types of Accommodation



Types of Visitor Attraction



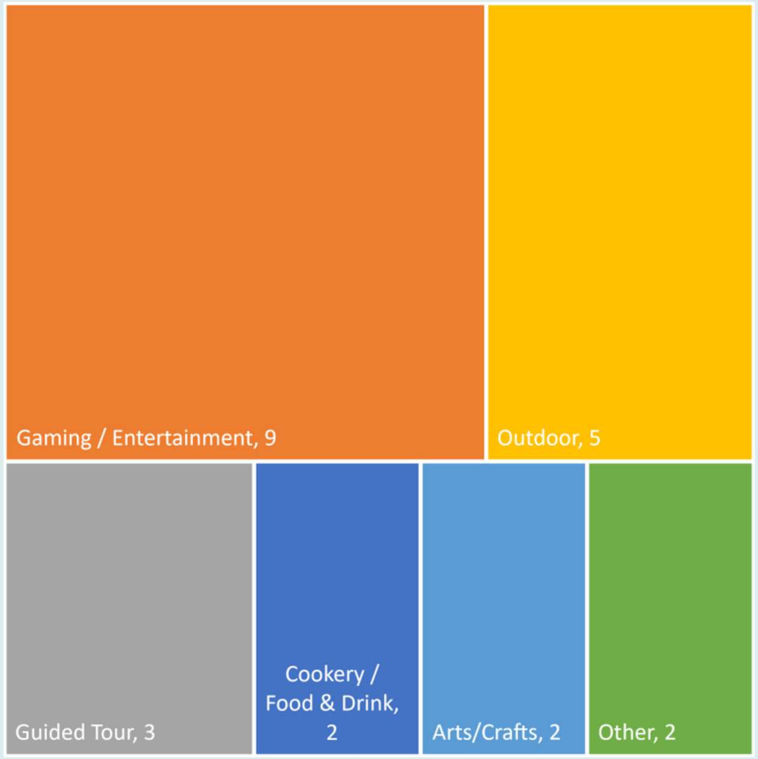
Types of Food & Drink Businesses



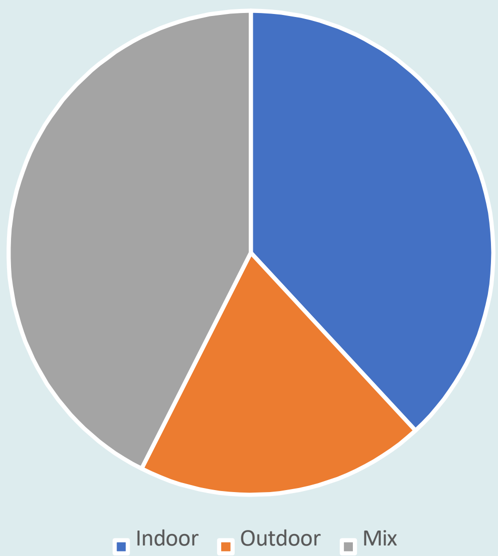
The Visitor Attractions Sector

Main Category	Nos.	%	Category Detail	Nos.	%
Country Park	11	7%	Municipal Park	5	3.0%
			Woodland	6	3.6%
Experience	23	14%	Cookery / Food & Drink	2	1.2%
			Gaming / Entertainment	9	5.3%
			Guided Tour	3	1.8%
			Outdoor	5	3.0%
			Arts / Crafts	2	1.2%
			Other	2	1.2%
Garden	4	2%	Formal / Park / Estate	3	1.8%
			Arboretum / Caves / Forest	2	1.2%
Historic Property	40	24%	Abbey / Castle / Fort /Tower / Priory	3	1.8%
			Historic House/ & Garden / Palace	27	16.0%
			Monument / Archaeological Site	3	1.8%
			Other Historic Property	7	4.1%
Leisure / Theme Park	1	1%	Model Village	1	0.6%
Museums & Art Galleries	36	21%	Museum	14	8.3%
			Art Gallery / Arts Centre / Theatre	22	13.0%
Place of worship	1	1%	Place of Worship (still in use)	1	0.6%
Railway	1	1%	Steam / Heritage Railway	1	0.6%
Visitor Centre	6	4%	Heritage / Visitor Centre	7	4.1%
Wildlife	12	7%	Farm / Rare Breeds / Farm Animals	12	7.1%
Workplace	1	1%	Distillery / Vineyard or Brewery	1	0.6%
Other	33	20%	Sports Venue – Spectator	2	1.2%
			Sports Venue – Participant	29	17.2%
	169			**169**	

Experiences by Type

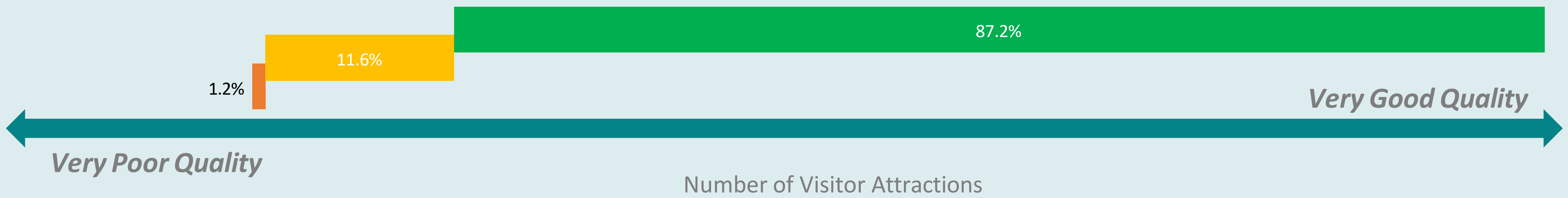


Indoor / Outdoor Attractions



1. Around 170 visitor attractions underpin the leisure tourism offer. Almost half of these are historic houses, museums or art galleries. This traditional offer is further supplemented by a range of natural attractions including country parks and gardens (9%), farm and rare breed destinations (7%), a range of sports venues (20%) and a relatively small selection of other attractions including a steam railway and a brewery.
2. By way of comparison, Gloucestershire has 373 visitor attractions but twice the land area making both counties similar in terms of attractions distribution. Both counties contain high value AoNB landscapes and a large visitor catchment within 2 hours' drive time. Knowledge of the Cotswolds by visitors however is likely to outrank that of the Chilterns which has only limited recognition in term of visitors' perceptions. Cliveden is the county's major visitor attraction with over 0.5m visitors and Windsor Great Park, Blenheim Palace and Whipsnade Zoo will also likely positively influence visits to Buckinghamshire.
3. Some 14% of attractions are experiences. This is lower than many counties with a more established leisure tourism base, such as Derbyshire where over a third of all attractions are experiences, with the majority offering outdoor activities. The breakdown for Buckinghamshire is shown in the tree map to the left. Outdoor experiences do figure in the mix although are overshadowed by Gaming / Entertainment. New outdoor experiences developed by local micro-businesses might be a fruitful element of support for the new strategy.
4. The quality of visitor attractions is generally excellent / very good although there are a small number that could be improved. This is shown on the bar chart below left.[1]

Quality of Visitor Attractions



Notes:
1. Quality is assessed by taking all visitor attractions with over 10 reviews on TripAdvisor and giving each a percentage score based on the number of 'excellent' and 'very good' ratings combined as a proportion of total ratings. These are then sorted into quartiles as per the chart on the left where three quartiles are evident and there are no visitor attractions which gets below a 38% mark.
2. ALVA - Association of Large Visitor Attractions. For a view of larger visitor attractions see this link here.

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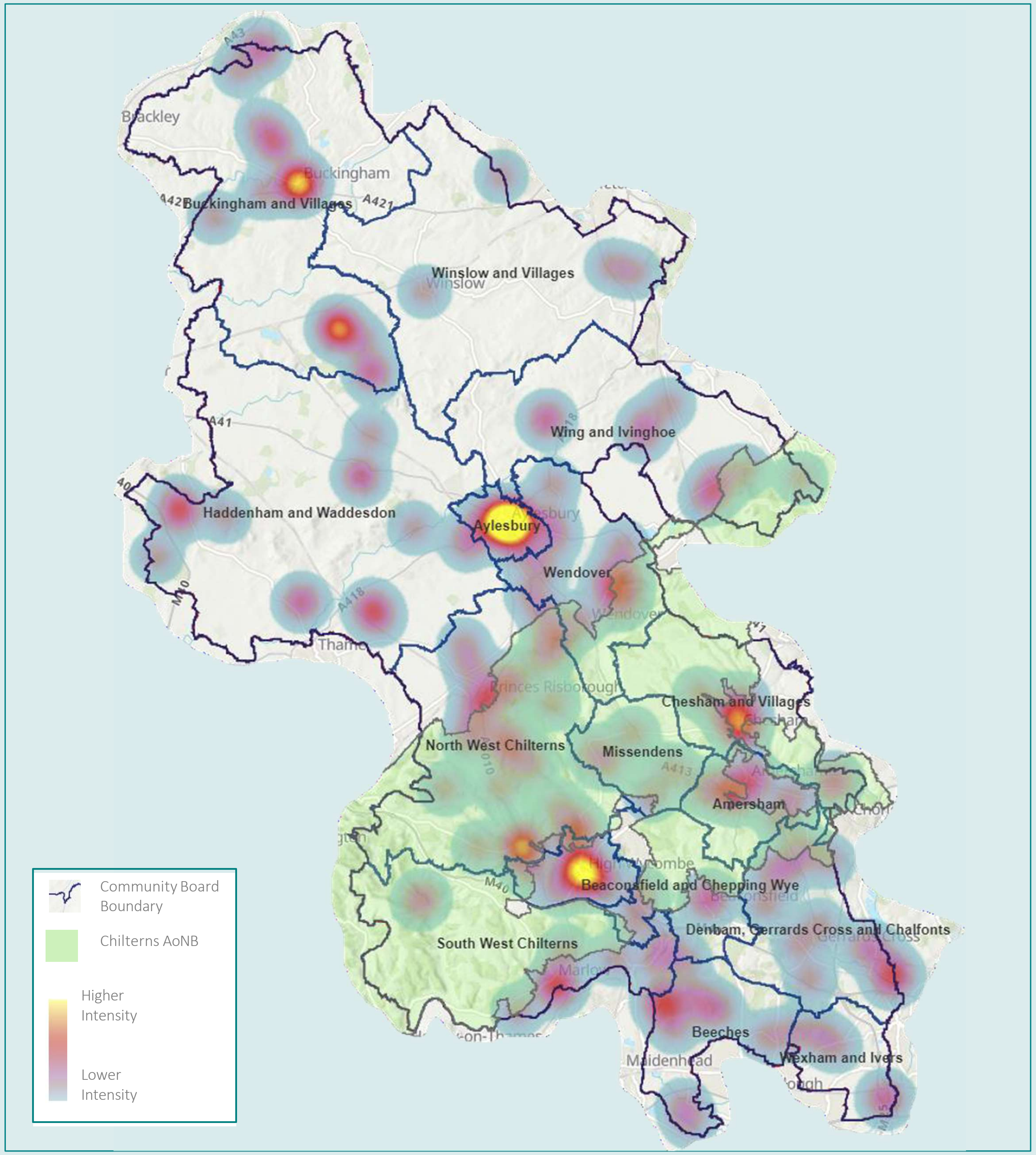
Visitor Attractions – Distribution and Type



Notes:

1. The map above left shows the density of visitor attractions. This gives an idea of the typical intensity of visitor activity and related pressures on transport.
2. The map above right shows the asset class by main category.

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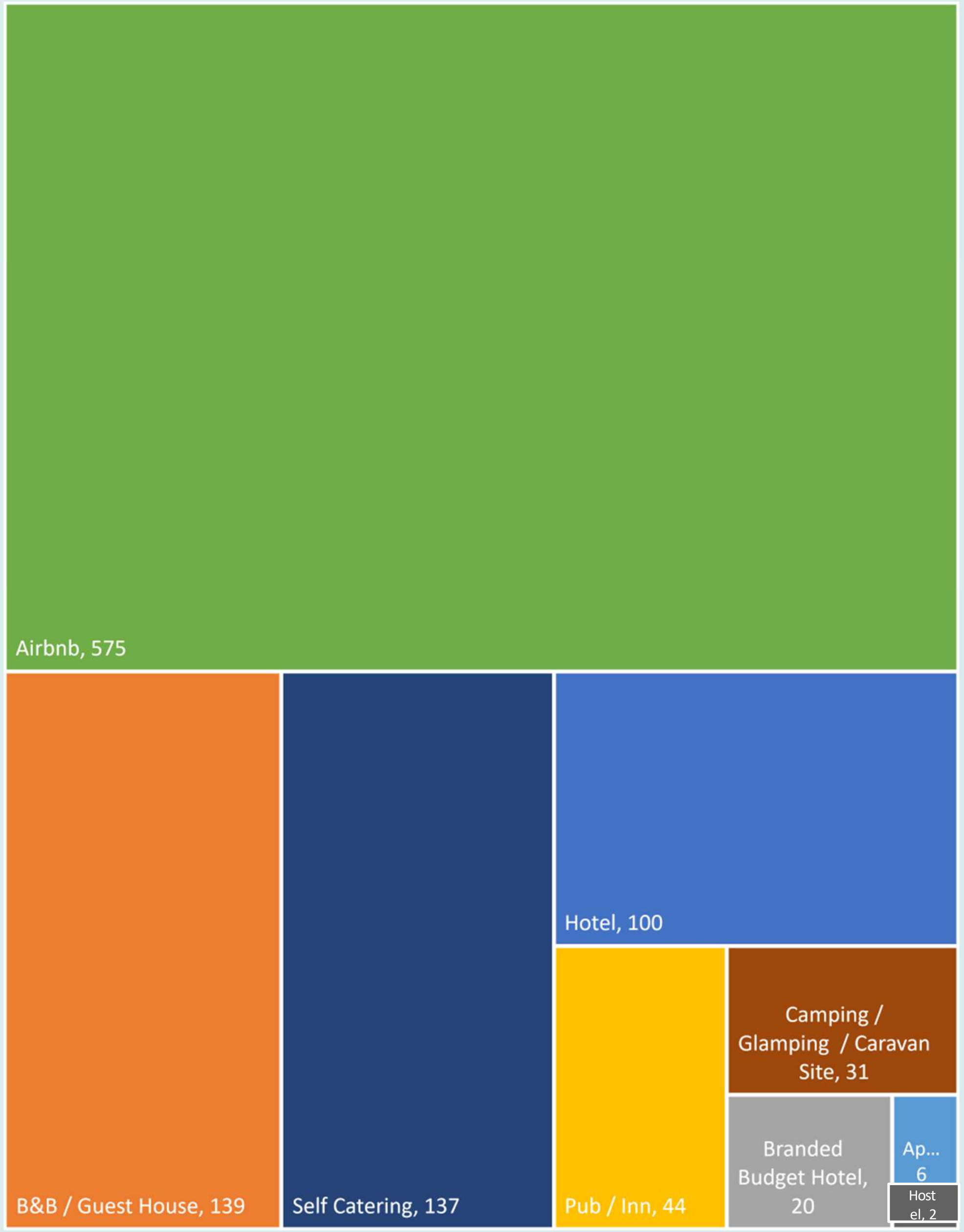
Accommodation Stock – Volume, Categories & Trends

Types of Accommodation



Airbnb by Area

Trend from 2016	2016	2022	% change
Accommodation - Serviced	443	309	-30%
Accommodation - Non Serviced	79	745	843%
Total	522	1,054	102%

2022 Accommodation by Community Board

Volume of Accommodation Stock - Entire Study Area					
Sector	**Est's**	**%**	**Sub Sector**	**Est's**	**Rooms**
Serviced	309	29%	Hotel	99	3,669
			B&B / Guest House	140	875
			Branded Budget Hotel	20	1,435
			Pub / Inn	44	311
			Aparthotel	6	32
Non-Serviced	745	71%	Airbnb	575	1,054
			Self Catering	137	425
			Camping / Glamping / Caravan Site	31	816
			Hostel / Bunkhouse / Camping Barn	2	4
Total	**1,054**			**1,054**	**8,621**

1. There are 1,054 accommodation establishments in Buckinghamshire, dominated by self-catering facilities, a sector which has grown in importance over the last 5+ years with serviced accommodation declining in absolute terms.[1]
2. The doubling of accommodation supply will largely have been achieved by conversion of residential and other domestic supply to leisure use. A stock of 79 self-catering establishments in 2016 mushroomed by over 800% by 2022 to 745 units. Room numbers however will not have increased anywhere near as much as establishment numbers and more major developments are the exception. The economic impact of self-catering properties is not as high as serviced accommodation, in income or employment terms. Buckinghamshire does however have a higher number of hotels relative to many other counties.
3. Serviced accommodation has declined which is a national trend. This 'reduction' however may be more the result of a switch in category with previous B&B owners turning to new distribution channels, like Airbnb, which provides more incentive to run on a self-catering basis.[2]
4. The proportion of self-catering properties to serviced is 2.4:1 which is more balanced than many other leisure focussed destinations. The business tourism and high-quality serviced offer in the southern part of the county is likely to be helping to drive additional value.
5. While there are more self-catering establishments, the picture is different when looking at rooms. Of 8,621 rooms in the county, 73% are offered by serviced operations, 17% are non-serviced, with the vast majority of these being self-catering, and 9% are provided by campsites.

Notes:

1. Trend from 2016 Source: – VisitEngland (2016) England Stock database. Comparison to the 2021 project is indicative only as data are not strictly comparable. The 2022 audit can be considered to include > 90% of all accommodation in the study area. There is likely to have been growth from 2016 to 2019, with 2022 COVID-19 affected.
2. There are 575 Airbnb properties identified that may also be sold through other channels. Most of these will have been established in the last five years. They can be for single rooms in residential dwellings or, more normally, for whole dwellings often operated on a seasonal or non-regular basis. These are not shown by Community Board as their exact location is unknown.

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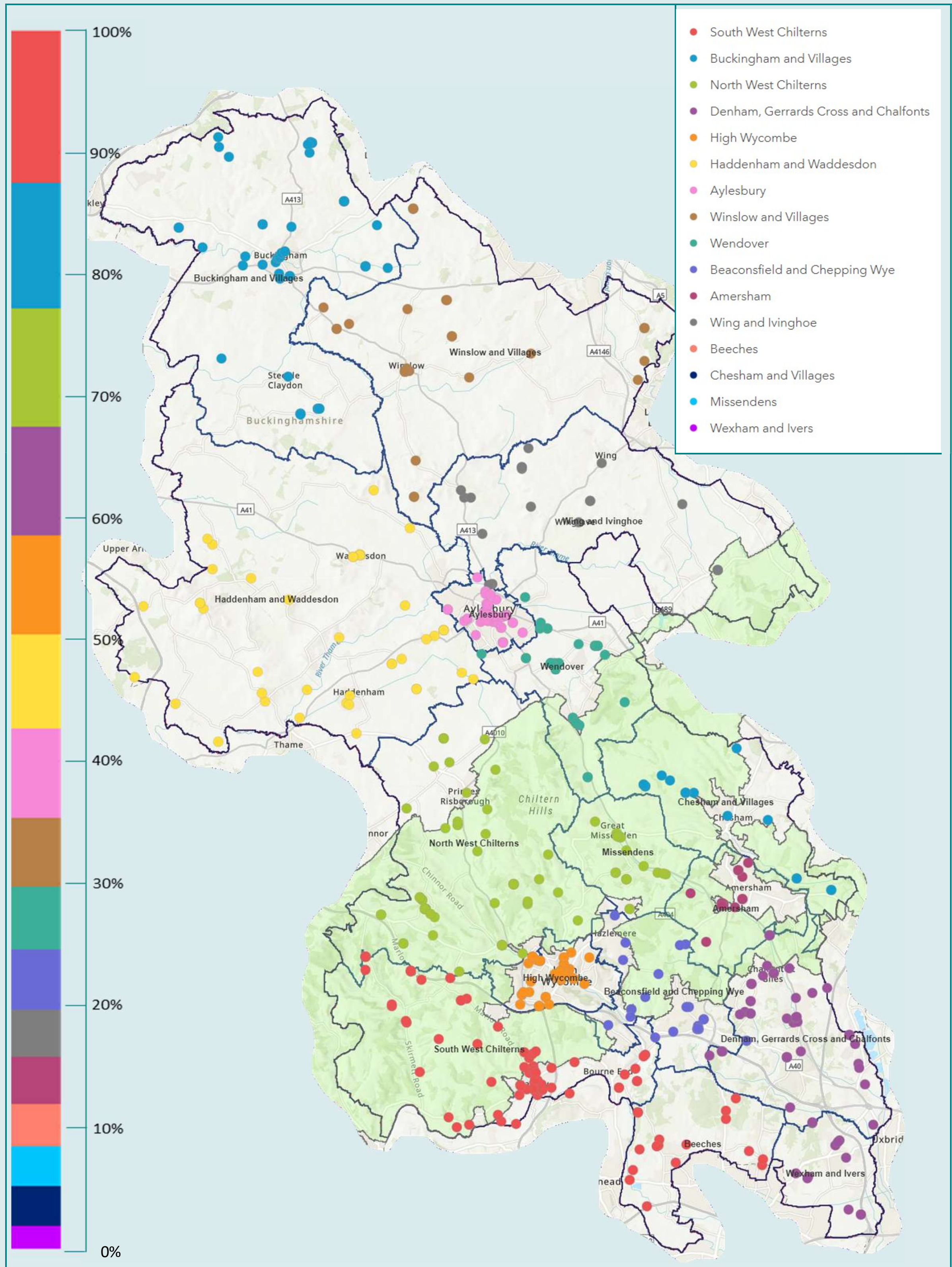
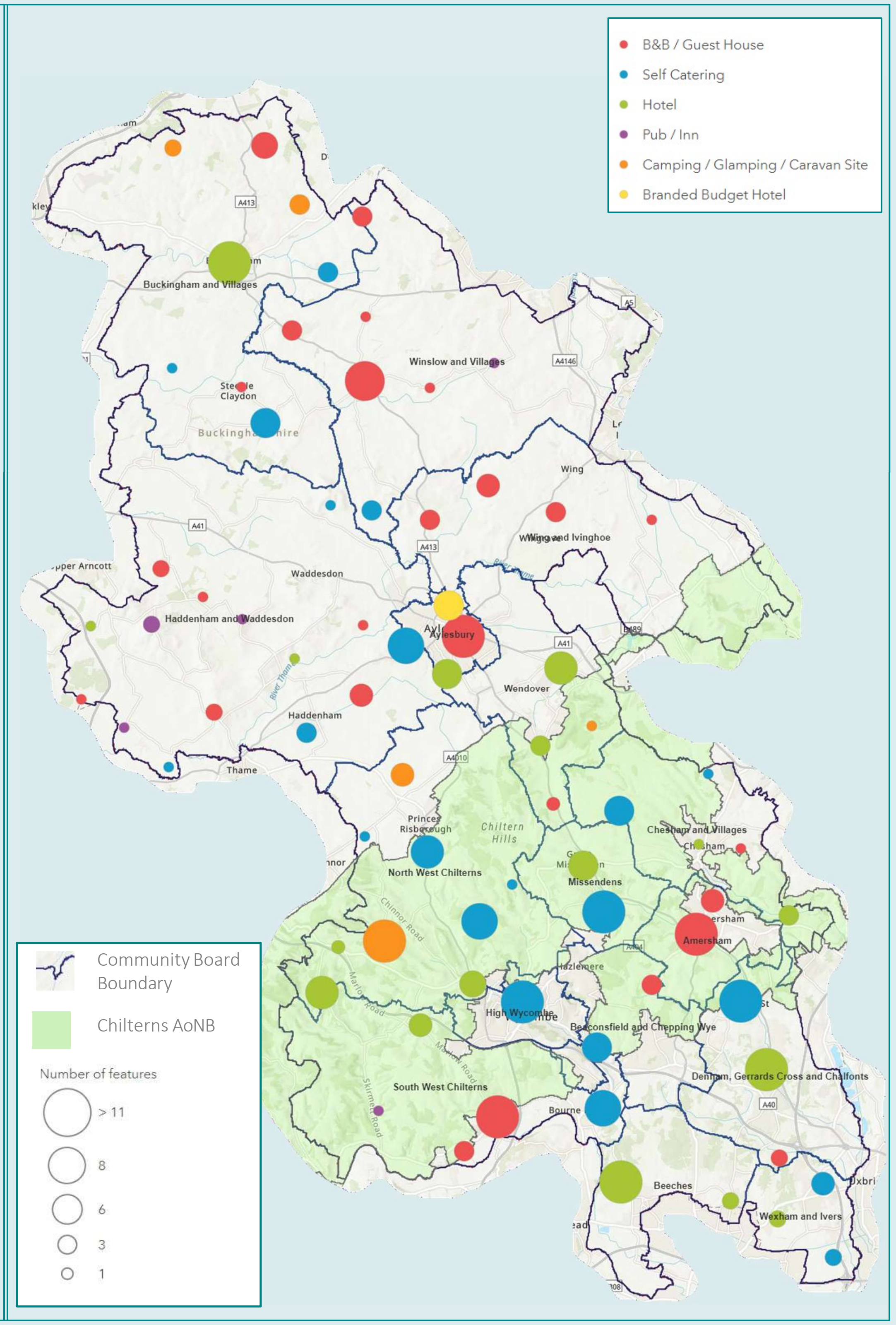
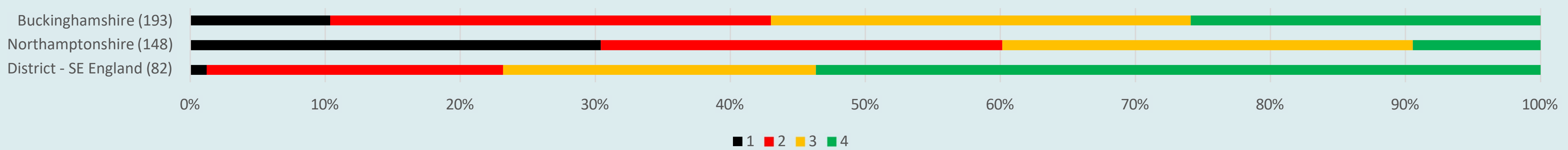
All Accommodation – by Community Board & Clustered Category





1. The map on the far left shows the distribution of accommodation by Community Board area. Supply is relatively well spread throughout the county but with some modest clustering evident: 42% of accommodation is situated in the four community boards of Buckingham and Villages, North West / South West Chilterns and Denham, Gerrards Cross and Chalfonts. Less well served are Wexham and Ivers; Beeches; Chesham and Villages; and Missendens at 2%, 4%, 4% and 4% of total stock respectively.
2. The map on the right shows the main clusters by category with the predominance of self-catering accommodation demonstrated in the Chilterns, (as well as 20 or so B&Bs to the south of the AoNB) a healthy distribution of hotels and other B&Bs throughout. More limited is the camping / glamping and budget hotel accommodation.
3. The average size of Buckinghamshire's hotels is 39.4 rooms while B&Bs are slightly smaller than the norm at 4.4 rooms. Branded budget hotels supply 71.8 rooms on average, while pubs bring a further 7.1 rooms. Self-catering facilities average 3.2 rooms while for Airbnb's it is 1.8 rooms, slightly below average.
4. Quality is below average for the region, though higher than neighbouring Northamptonshire, when looking at review scores as can be seen from the bar chart below left.

Quality of Serviced Accommodation



Notes:

1. Quality scores relate to 193 serviced accommodation properties across the County and are derived from Trip Advisor ratings in December 2022. Scores are the number of Excellent reviews against all reviews by individual property and are expressed as a percentage. These are then grouped into four quartiles with green the best and black the worst.

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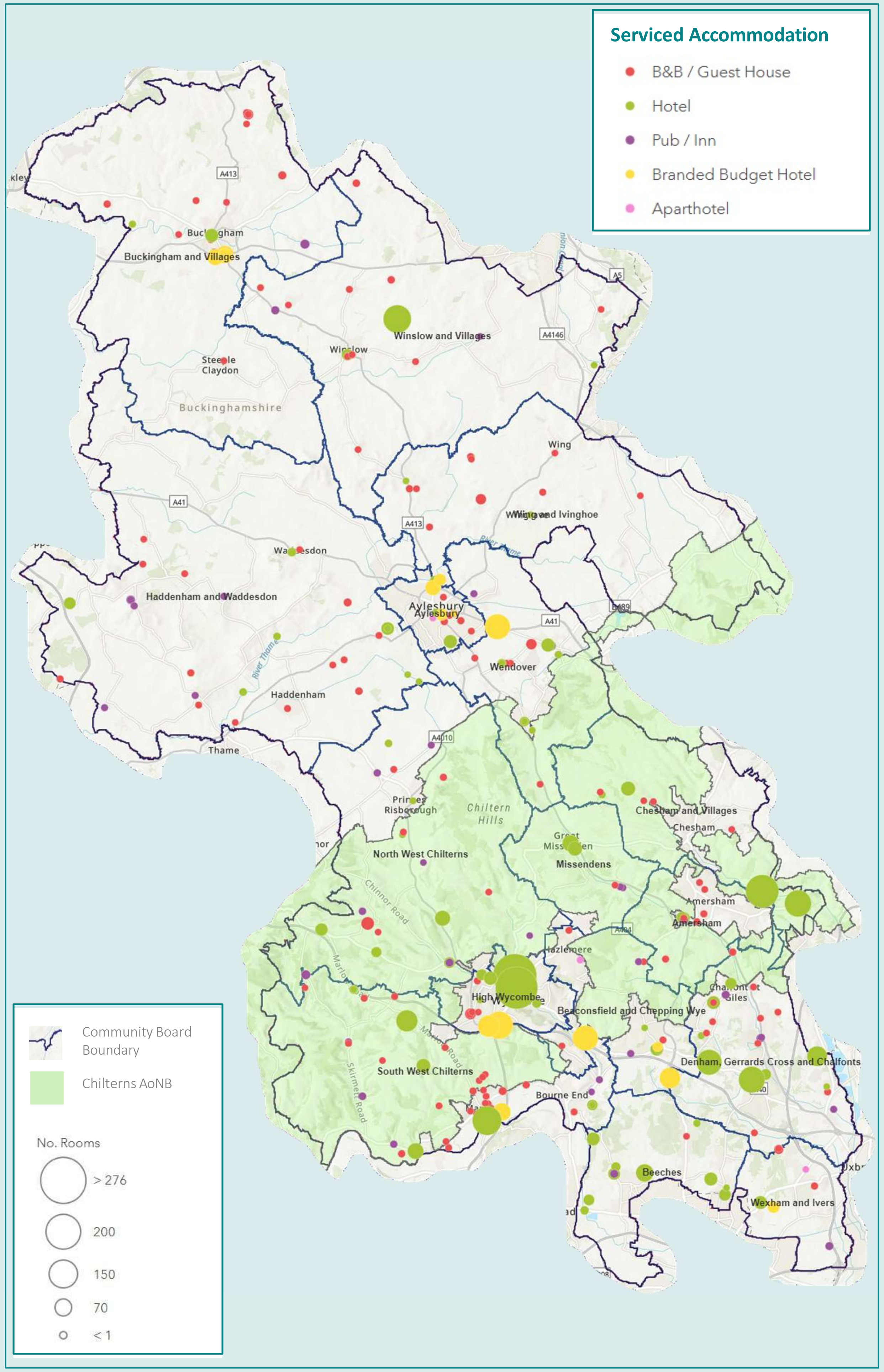
Accommodation by Type & Number of Rooms



Sector	Est's	%	Sub Sector	Est's	Total Rooms	Serviced Rooms	Non-Serviced Rooms	Camping Pitches
Accommodation - Serviced	309	29%	Hotel	99	3,669	3,669		
			B&B / Guest House	140	875	875		
			Branded Budget Hotel	20	1,435	1,435		
			Pub / Inn	44	311	311		
			Aparthotel	6	32	32		
Accommodation - Non-Serviced	745	71%	Airbnb	575	1,054		1,054	
			Self Catering	137	425		425	
			Camping / Glamping / Caravan Site	31	816			816
			Hostel, Bunkhouse or Camping Barn	2	4		4	
Total	**1,054**			**1,054**	**8,621**	**6,322**	**1,483**	**816**

Category	Establishment	Rooms	Loaction
Hotel	Kingfishers Guest House	276	High Wycombe
Hotel	Rye View Lodge	266	High Wycombe
Hotel	De Vere Venues Latimer Place	197	Chesham & Villages
Hotel	Crowne Plaza Marlow	168	South West Chilterns
Hotel	Horwood House Hotel	159	Winslow & Villages
Hotel	Hampton by Hilton High Wycombe	155	High Wycombe
Hotel	Bedford Arms Hotel	150	Chesham & Villages
Self Catering	Town Farm Cottages	33	Wing and Ivinghoe
Self Catering	Alexandra Park	28	High Wycombe
Self Catering	Hitchambury Manor	26	Beeches
Self Catering	Weatherhead Farm	12	Buckingham & Villages
Self Catering	The Stalls and Hayloft	11	Haddenham & Waddesdon
Self Catering	Parkfields Barns Self Catering	10	Buckingham & Villages
Camping	Chiltern Retreat Rural Camping	100	South West Chilterns
Camping	Dadford Road Campsite	100	Buckingham & Villages
Camping	Thornton Farms	100	Buckingham & Villages
Camping	Town Farm Campsite, Ivinghoe	100	Wing & Ivinghoe
Camping	Hedsor Field Camping	60	Beaconsfield & Chepping Wye
Camping	Orchard View Farm	50	North West Chilterns

Notes:

1. All types of camping is considered as non-serviced but the category is shown separately in the table.

1. The table above shows accommodation by category and number of rooms. Only Serviced Accommodation is represented on the map. The table on the left shows the top establishments in terms of rooms for three categories, serviced, non-serviced and camping.
2. The serviced sector makes up 32% of establishments but 73% of rooms against the non-serviced sector which supplies 2,734 rooms / pitches. Larger hotels are often distributed to the south of the study area.
3. Larger accommodation providers typically have between 150 – 250 rooms and there are relatively few larger self-catering operations which reflects location and context. Buckingham and Villages CB is a popular area for self-catering and camping.
4. A high 94% of non-serviced accommodation has 10 rooms or fewer while only 58% of serviced accommodation has 10 rooms or fewer. Generally, while the serviced sector has fewer properties it makes up for it in terms of rooms.

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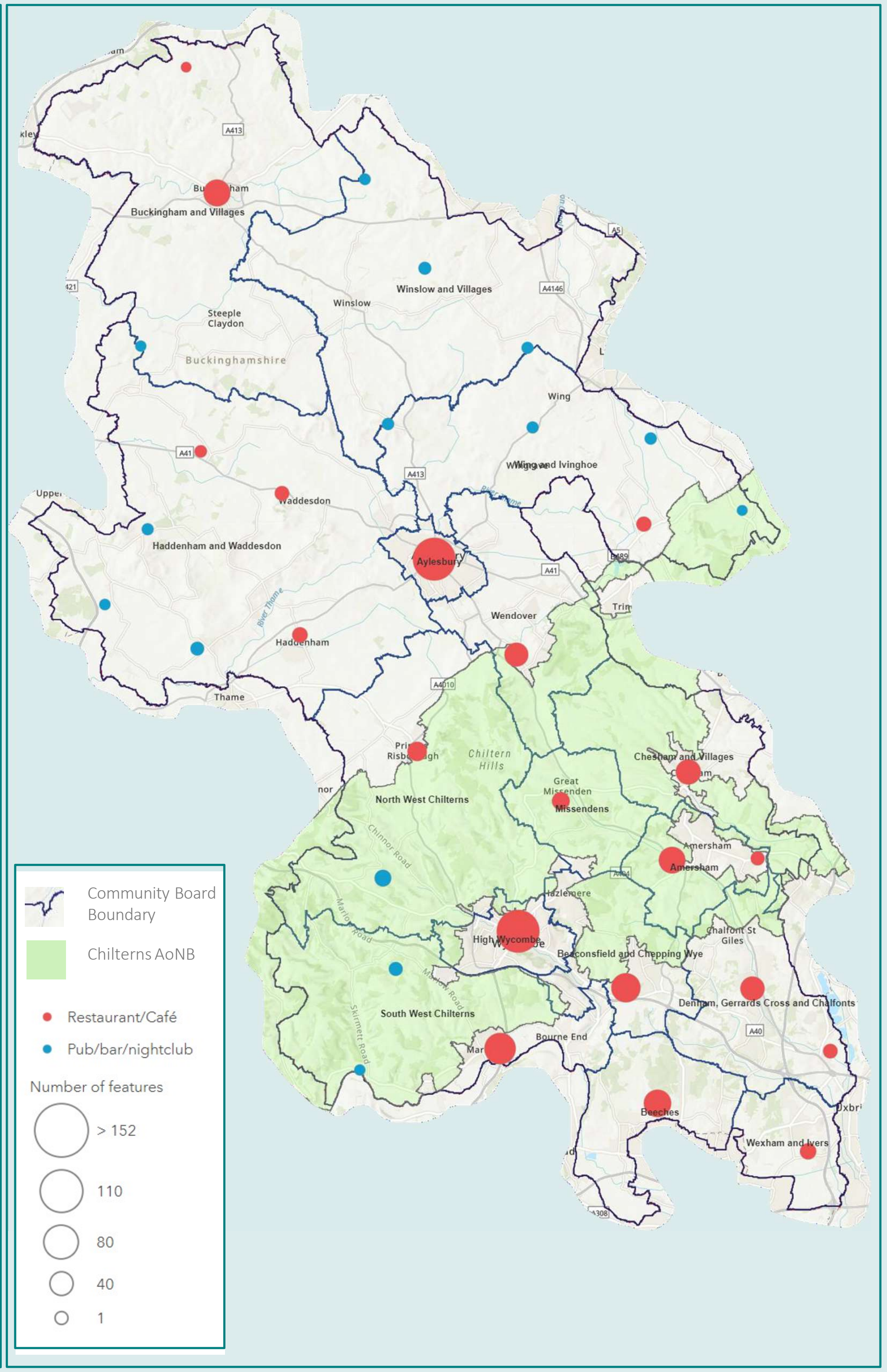
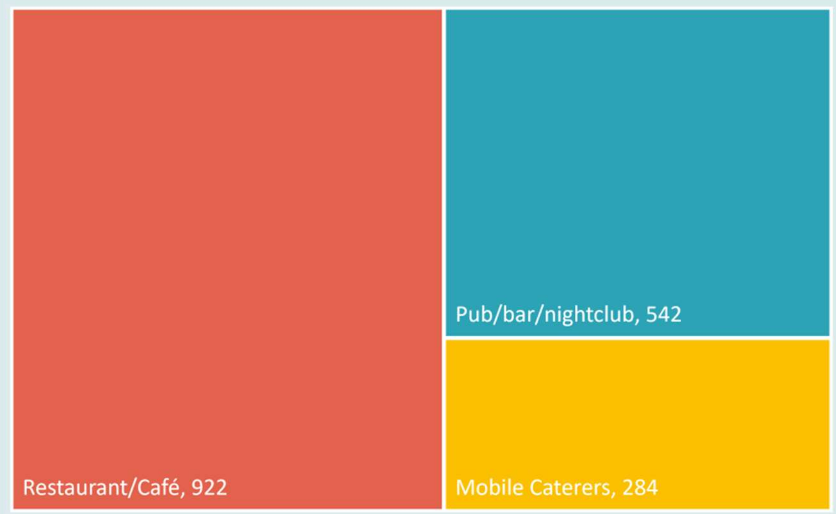
Restaurants and Pubs by Location and Key Cluster

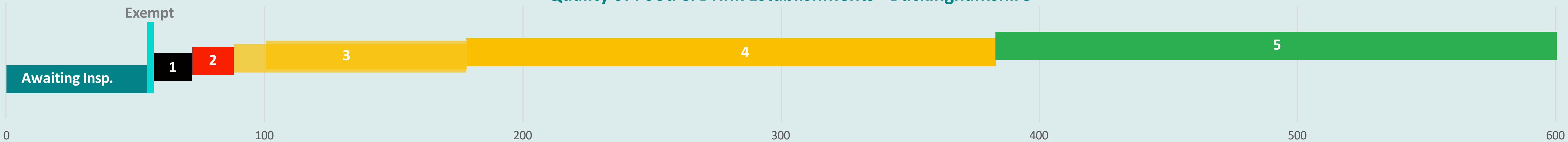


1. There are 1,464 restaurants, cafés and pubs in the study area. Of these 922 are restaurants and cafés while 542 are pubs, bars and nightclubs. Unsurprisingly their distribution is clustered around the main centres of population with larger populations seeing more establishments, Aylesbury and High Wycombe account for 12 and 10% of this category respectively.
2. Quality when measured against the Food Standards Agency's scores sees 68% receiving the highest score of 5 with 20% getting '4' and 8.9% getting '3'. Some 5% are awaiting inspection. When benchmarked against other counties audited by Tomorrow's Tourism these scores are relatively lower, with a recent example seeing 80% of properties achieving the highest mark.
3. There are also 284 footloose mobile caterers potentially operating in the study area who will travel around Buckinghamshire to events and a total of 174 in the Chilterns.

Food & Drink Businesses by Category



Quality of Food & Drink Establishments - Buckinghamshire



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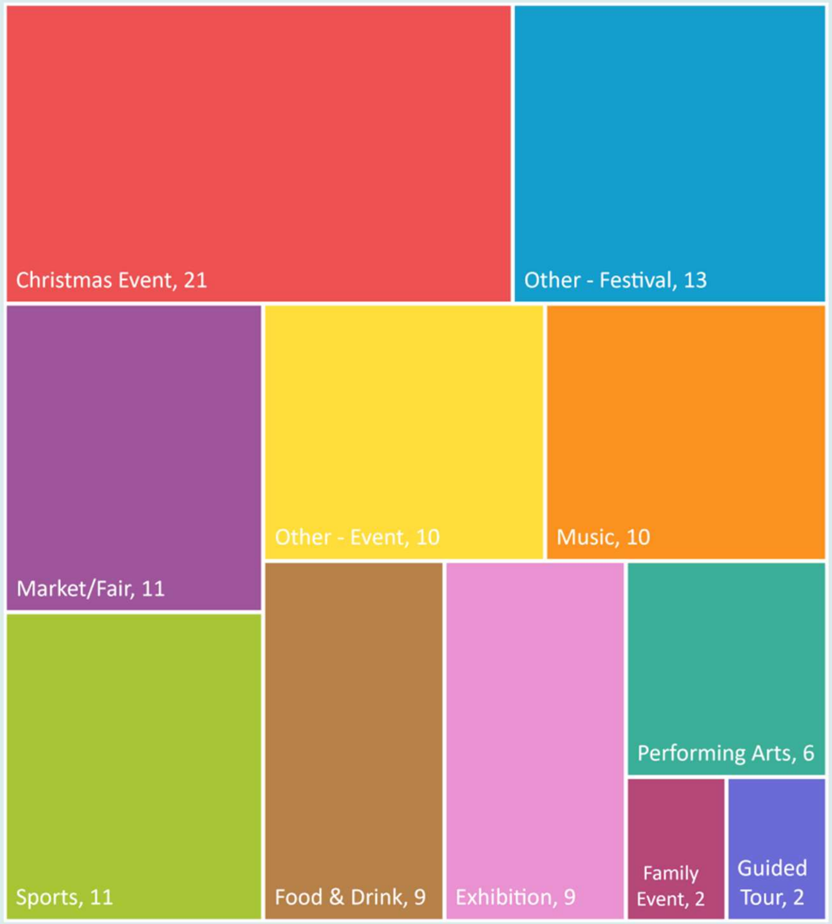
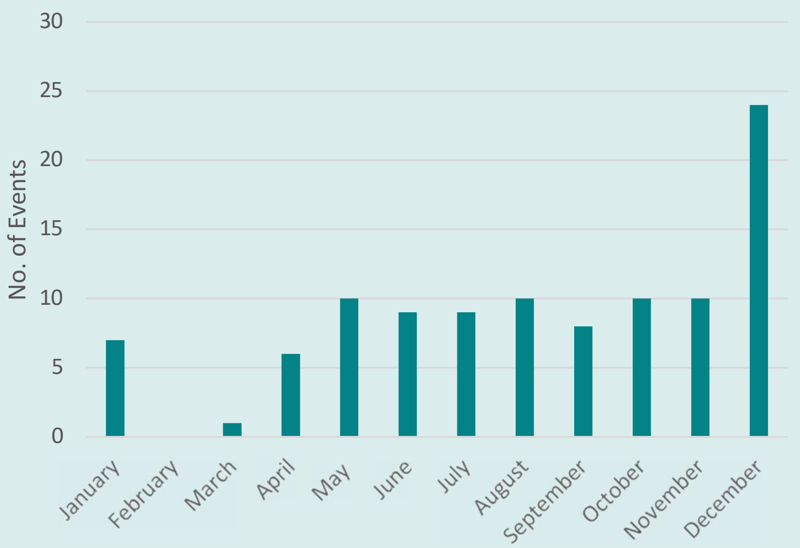
Festivals & Events

Type by Main Category



Event Calendar



Note:

1. The Event Calendar bar chart does not represent the annual event cycle but rather the events that were being planned and publicised at the time of the Audit – December 2022. Hence the significant over representation of the month of December. For best results this audit should be undertaken quarterly and the results for the year amalgamated.

1. Festivals & events are an important component of most visitor economies. In Buckinghamshire in 2022, there were at least 115 events with Buckingham and Villages, South West Chilterns and Aylesbury hosting around half of these. A quarter of the County's events take place in the Chilterns.

2. It should be noted that the audit represents a snapshot in time, and there will be other events planned earlier in the year where promotion has lapsed. The timing of this audit meant that Christmas events prevailed with the other principal category being Other Festivals where economic impact will be greater for the longer running events such as the Buckingham Literary Festival.

3. A number of events are run by established visitor attractions like Waddesdon Manor as part of a season including Christmas lights. The map may misrepresent the numbers of these events that happen in the same location.

4. Festivals & events are a good way to create added value across the area, build overnight stays and drive visitation to lesser known but accessible areas.

Community Board	Count	%
Buckingham and Villages	23	20%
South West Chilterns	21	18%
Aylesbury	12	11%
Chesham and Villages	11	10%
Denham, Gerrards Cross and Chalfonts	6	5%
Missendens	6	5%
Amersham	5	4%
Haddenham and Waddesdon	5	4%
Wendover	5	4%
Wexham and Ivers	4	4%
Wing and Ivinghoe	4	4%
North West Chilterns	3	3%
Various	3	3%
Beaconsfield and Chepping Wye	2	2%
Beeches	2	2%
Winslow and Villages	2	2%
High Wycombe	1	1%
Total	115	

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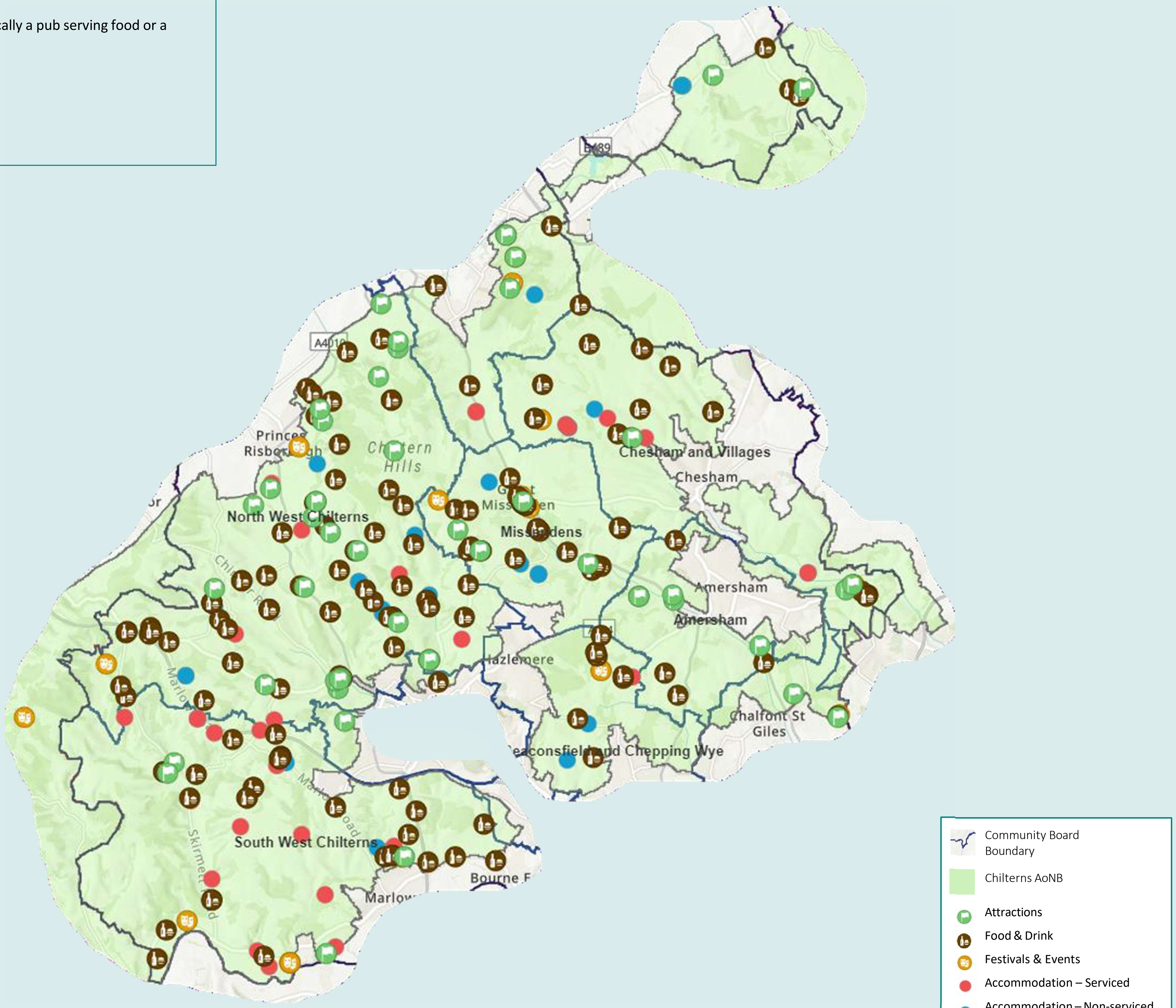
A Spotlight on Buckinghamshire's Chilterns

Notes:

1. Some establishments have two or more assets, typically a pub serving food or a visitor attraction with a café.
2. Events relate to 2022/23.



Chilterns Accommodation by CB	All Types
Amersham	2
Beaconsfield and Chepping Wye	4
Chesham and Villages	15
Denham, Gerrards Cross and Chalfonts	3
Missendens	15
North West Chilterns	35
South West Chilterns	32
Wendover	2
Wing and Ivinghoe	3
	111

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Volume & Value of Tourism – 2019 Baseline

Chart 1 - Buckinghamshire - All Domestic Overnight Trips - Long-term Trend by Area ('000 of trips)

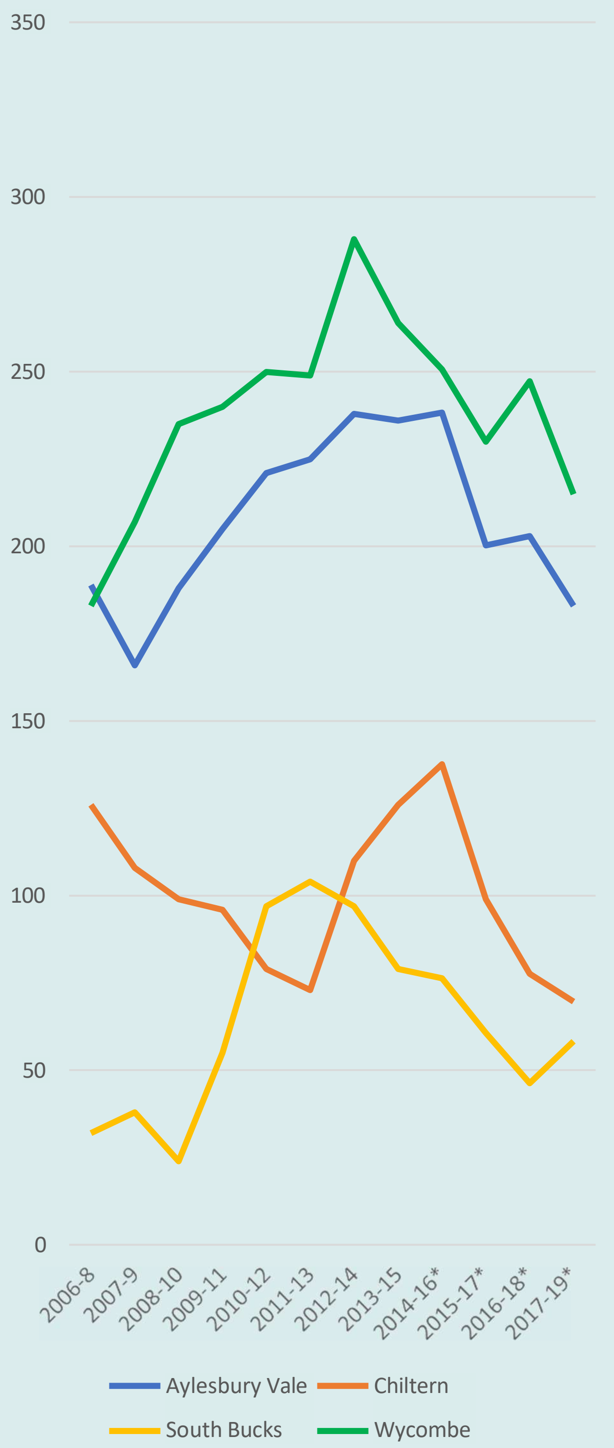
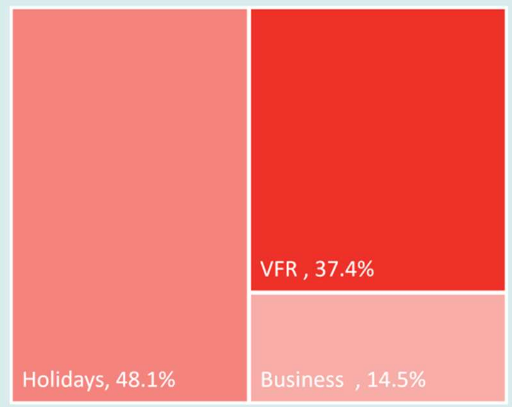


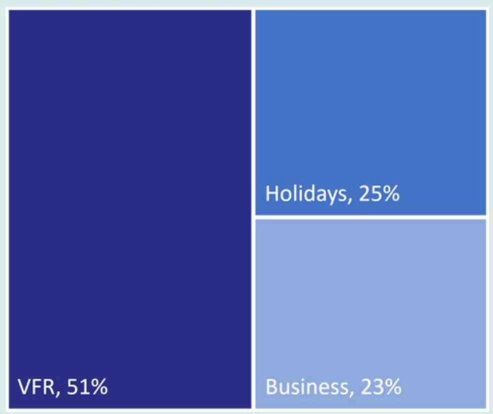
Table 1. Summary of Market Size

Visit Type	Volume (million)	Share	Value (£million)	Share
Domestic Day Visits	19.2	92.9%	£856	73.5%
Domestic Overnight Visits	1.098	5.3%	£157	13.5%
Inbound Visits	0.36	1.7%	£152	13.0%
Total	**20.66**		**£1,165**	

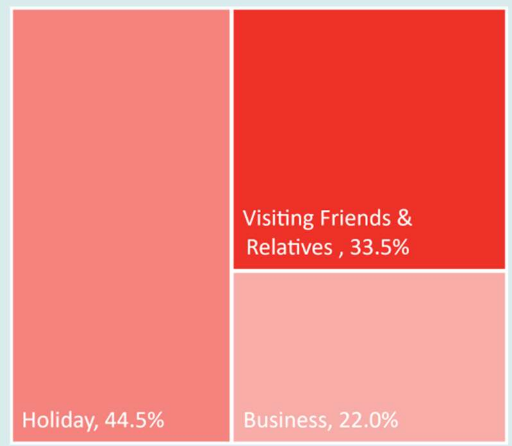
Domestic Tourism - England % Split by Trip Purpose (2017-19)



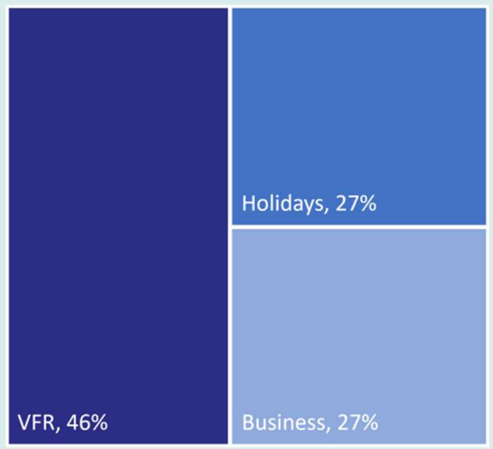
Domestic Tourism - Buckinghamshire % Split by Trip Purpose (2019)



Inbound Tourism - England % visits split by trip purpose (2017-19)

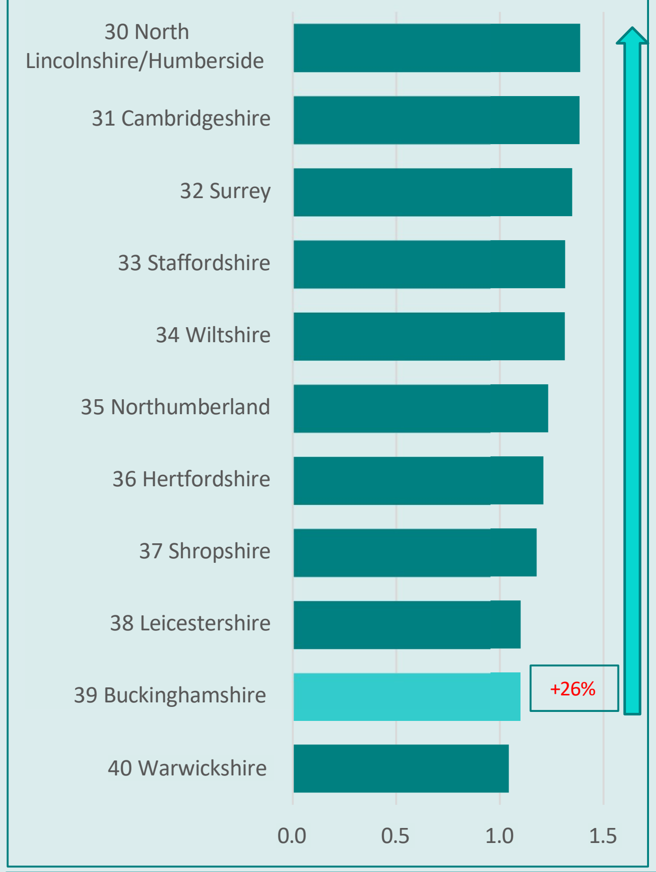


Inbound Tourism - Buckinghamshire % visits split by purpose (2017-19)

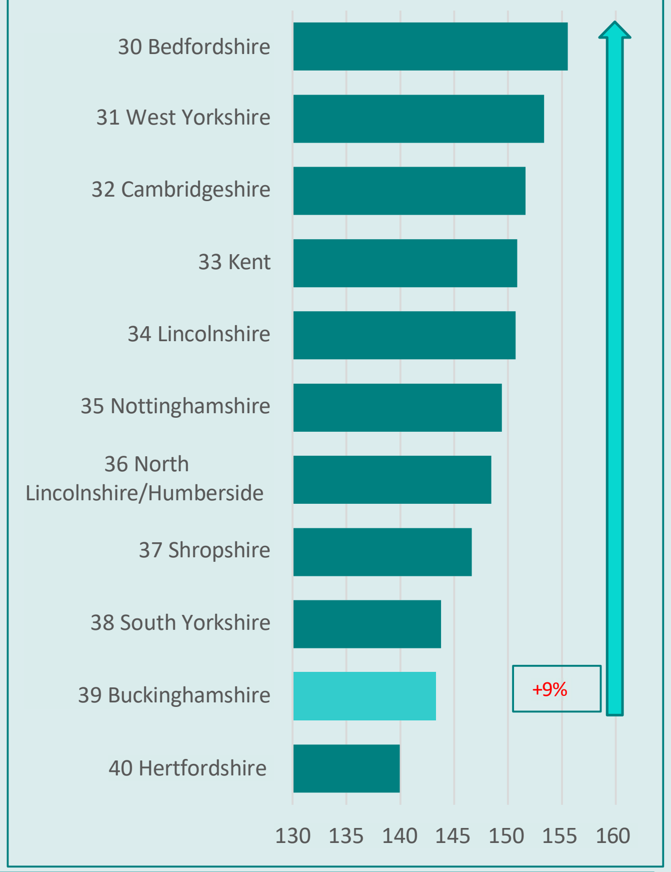


Buckinghamshire's Place in England's Tourism League Table

Overnight Trips 2017-19 (millions)



Overnight Trips 2017-19 - Spend per trip (£)



1. Table 1 reflects demand in 2019 showing some 20 million visits and spending just over £1bn. Post COVID figures will not be as good while the split, shown in the red and blue squares to the left has also radically changed i.e. when looking at international. The table also includes the volume and value of day visits, which dominate to a greater extent then other competitor counties.
2. The other charts and graphs on this page track overnight tourism. The league tables above show that in terms of both total trips and spend, the County is in 39th place. Retaining more people to stay rather than come for a day visit will also help overall share figure for tourism in Table 1.
3. Chart 1 shows the 12 year trend for each of Buckinghamshire's areas. Over 1.4m domestic visitors stayed in 2019 of which around 77% stayed in either Aylesbury Vale or Wycombe.
4. For the inbound market, VFR is very buoyant with the County over-indexing the national share by a significant 10.5%. This again reduces value added as by definition this group will not use paid accommodation. Holiday trips are 60% of the England average while business is a robust share.

Notes:

1. Sources: VisitBritain (2019) Great Britain Tourism Survey & Great Britain Leisure Day Visits Survey & ONS (2019) – International Passenger Survey
2. The domestic data are three year average of trips taken wit the baseline considered as 2017 – 19 given interruptions in the Surveys during the COVID-19 pandemic. Such an average helps with robustness given small sample sizes.

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Market Review 2022 – Summary

Overseas

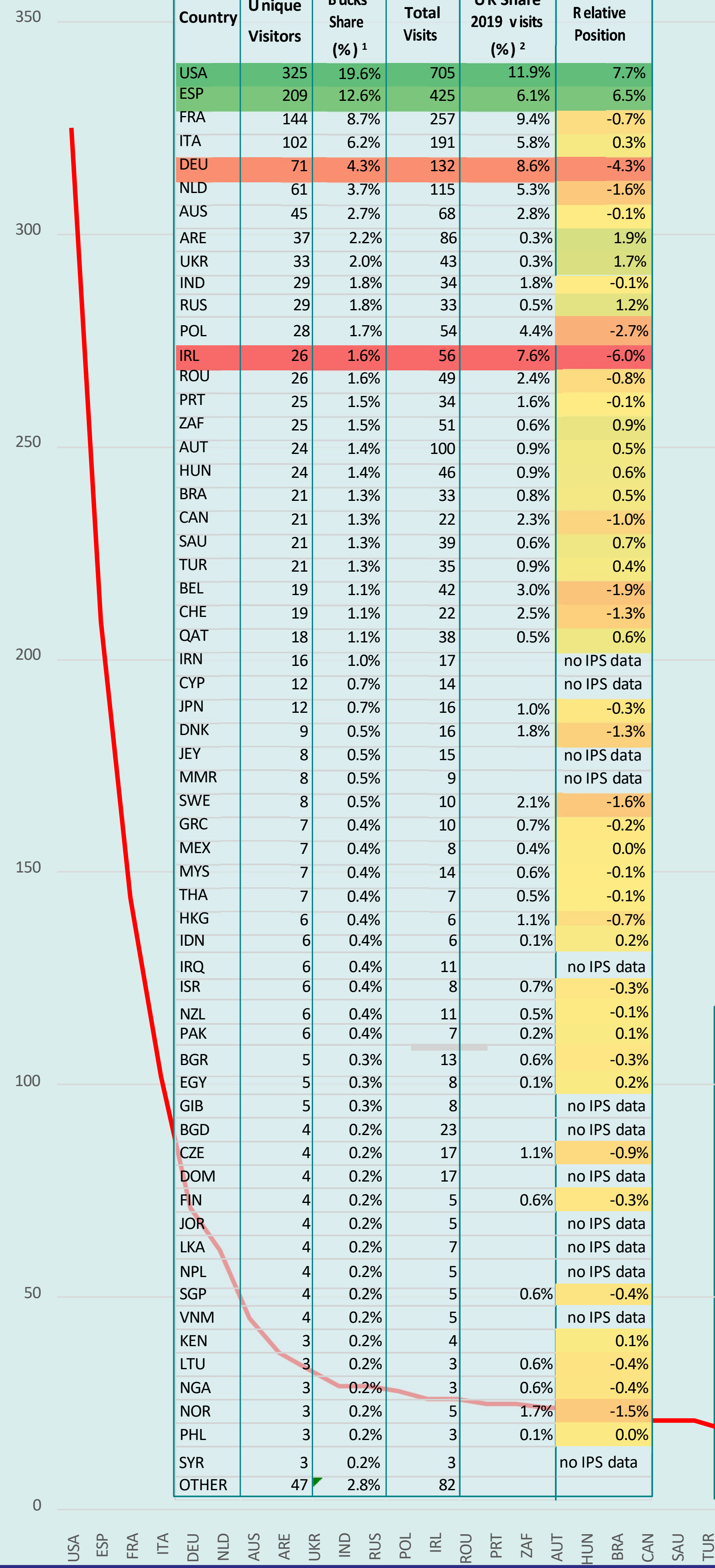


Table 1 - Top 60 (of 93) Overseas Markets to Buckinghamshire

Country	Unique Visitors	Bucks Share (%) [1]	Total Visits	UK Share 2019 visits (%) [2]	Relative Position
USA	325	19.6%	705	11.9%	7.7%
ESP	209	12.6%	425	6.1%	6.5%
FRA	144	8.7%	257	9.4%	-0.7%
ITA	102	6.2%	191	5.8%	0.3%
DEU	71	4.3%	132	8.6%	-4.3%
NLD	61	3.7%	115	5.3%	-1.6%
AUS	45	2.7%	68	2.8%	-0.1%
ARE	37	2.2%	86	0.3%	1.9%
UKR	33	2.0%	43	0.3%	1.7%
IND	29	1.8%	34	1.8%	-0.1%
RUS	29	1.8%	33	0.5%	1.2%
POL	28	1.7%	54	4.4%	-2.7%
IRL	26	1.6%	56	7.6%	-6.0%
ROU	26	1.6%	49	2.4%	-0.8%
PRT	25	1.5%	34	1.6%	-0.1%
ZAF	25	1.5%	51	0.6%	0.9%
AUT	24	1.4%	100	0.9%	0.5%
HUN	24	1.4%	46	0.9%	0.6%
BRA	21	1.3%	33	0.8%	0.5%
CAN	21	1.3%	22	2.3%	-1.0%
SAU	21	1.3%	39	0.6%	0.7%
TUR	21	1.3%	35	0.9%	0.4%
BEL	19	1.1%	42	3.0%	-1.9%
CHE	19	1.1%	22	2.5%	-1.3%
QAT	18	1.1%	38	0.5%	0.6%
IRN	16	1.0%	17		no IPS data
CYP	12	0.7%	14		no IPS data
JPN	12	0.7%	16	1.0%	-0.3%
DNK	9	0.5%	16	1.8%	-1.3%
JEY	8	0.5%	15		no IPS data
MMR	8	0.5%	9		no IPS data
SWE	8	0.5%	10	2.1%	-1.6%
GRC	7	0.4%	10	0.7%	-0.2%
MEX	7	0.4%	8	0.4%	0.0%
MYS	7	0.4%	14	0.6%	-0.1%
THA	7	0.4%	7	0.5%	-0.1%
HKG	6	0.4%	6	1.1%	-0.7%
IDN	6	0.4%	6	0.1%	0.2%
IRQ	6	0.4%	11		no IPS data
ISR	6	0.4%	8	0.7%	-0.3%
NZL	6	0.4%	11	0.5%	-0.1%
PAK	6	0.4%	7	0.2%	0.1%
BGR	5	0.3%	13	0.6%	-0.3%
EGY	5	0.3%	8	0.1%	0.2%
GIB	5	0.3%	8		no IPS data
BGD	4	0.2%	23		no IPS data
CZE	4	0.2%	17	1.1%	-0.9%
DOM	4	0.2%	17		no IPS data
FIN	4	0.2%	5	0.6%	-0.3%
JOR	4	0.2%	5		no IPS data
LKA	4	0.2%	7		no IPS data
NPL	4	0.2%	5		no IPS data
SGP	4	0.2%	5	0.6%	-0.4%
VNM	4	0.2%	5		no IPS data
KEN	3	0.2%	4		0.1%
LTU	3	0.2%	3	0.6%	-0.4%
NGA	3	0.2%	3	0.6%	-0.4%
NOR	3	0.2%	5	1.7%	-1.5%
PHL	3	0.2%	3	0.1%	0.0%
SYR	3	0.2%	3		no IPS data
OTHER	47	2.8%	82		

UK [3]

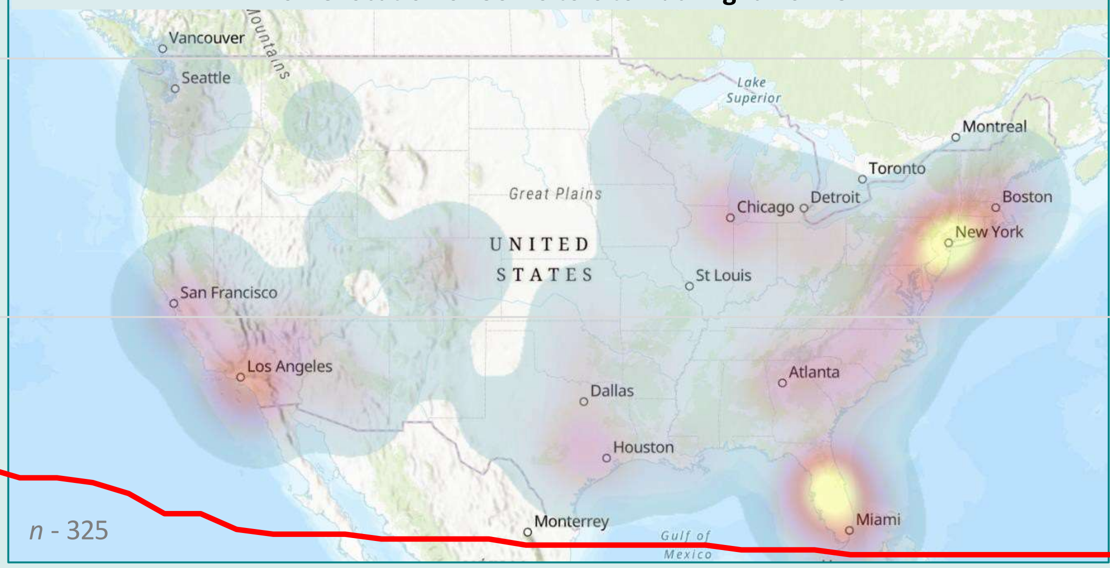
Table 2 Visitors within Buckinghamshire

	Unique Visitors	Visitor %	Total Visits	Visits %	Repeat Ratio
Wycombe	32,125	27.4%	266,484	41.3%	8.3
Aylesbury Vale	28,736	24.5%	198,719	30.8%	6.9
Chiltern	7,111	6.1%	23,505	3.6%	3.3
South Bucks	3,623	3.1%	10,717	1.7%	3.0
	71,595	**61.0%**	**499,425**	**77.3%**	

Table 3 Top 20 Districts for visiting Buckinghamshire

	Unique Visitors	Visitor %	Total Visits	Visits %	Repeat Ratio
Windsor and Maidenhead	6,669	5.7%	32,727	5.1%	4.9
Milton Keynes	5,036	4.3%	15,560	2.4%	3.1
South Oxfordshire	4,805	4.1%	14,049	2.2%	2.9
Dacorum	2,874	2.4%	6,975	1.1%	2.4
Cherwell	2,865	2.4%	7,850	1.2%	2.7
South Northamptonshire	2,829	2.4%	14,821	2.3%	5.2
Hillingdon	2,430	2.1%	5,917	0.9%	2.4
Wokingham	2,225	1.9%	5,645	0.9%	2.5
Slough	2,047	1.7%	6,345	1.0%	3.1
Central Bedfordshire	2,009	1.7%	4,910	0.8%	2.4
Bracknell Forest	1,209	1.0%	3,473	0.5%	2.9
Reading	1,008	0.9%	2,444	0.4%	2.4
Three Rivers	853	0.7%	1,954	0.3%	2.3
Ealing	834	0.7%	2,709	0.4%	3.2
Oxford	810	0.7%	1,989	0.3%	2.5
Harrow	805	0.7%	1,906	0.3%	2.4
Bedford	639	0.5%	1,432	0.2%	2.2
Rochford	559	0.5%	1,951	0.3%	3.5
Northampton	557	0.5%	1,916	0.3%	3.4
Birmingham	546	0.5%	1,075	0.2%	2.0
Other	4,241	3.6%	10,805	1.7%	2.5
	45,850	**39.0%**	**146,453**	**22.7%**	

Home location of US visitors to Buckinghamshire



1. There are seven core inbound markets for Buckinghamshire: USA, Spain, France, Italy Germany, Netherlands and Australia, contributing 50% of total inbound visits. There is a long tail of other markets that are insignificant, shown as the red line on the graph with 3 digit country codes shown on both the x-axis and in Table 1.
2. As far as comparisons with the UK goes, the coloured column indicates the relative position of the county again the UK with green indicating higher performance (i.e. relatively more visitors from that market) with red lower relative performance. The county substantially over-indexes (out-performs) visits from the USA and Spain and extra efforts with these markets could be fruitful. The map shows a predominance of US visitors from Florida and the eastern seaboard which can help in targeting any later marketing. Florida and also Spain may also be reflecting ex-pat markets returning home.
3. The county underperforms when considering Germany, the Netherlands, Belgium and the Nordics. Ireland also underperforms but much of this is likely to relate to the Visiting Friends & Relatives (VFR) market rather than leisure / business.
4. The UK market indicates the normal distance decay effect where the majority of visitors come from relatively close to the county. Table 2 splits out Buckinghamshire residents via the old District Council boundaries and it can be seen that 61% of total visitors originate in the county and those visitors take 77% of all the trips.
5. Table 3 shows that over half of the remaining visitors to the county come from the Districts of Windsor and Maidenhead, Milton Keynes, South Oxfordshire, Dacorum, Cherwell and South Northamptonshire. Typically the purpose of trip for domestic staying tourists breaks down into three categories, Leisure (48%), Visiting Friends & Relatives (38%) and Business (15%).
6. Over 90% of visitors however are day visitors rather than overnighters.
7. Repeat visits are also important with Windsor & Maidenhead residents visiting almost six times a year on average - on an annualised basis where this data is for 10 months.

Sources:

1. Tomorrow's Tourism / near. Sample of 1,656 overseas visitors to 7 locations in Buckinghamshire visiting from 1 Jan – 31 Oct 22.
2. VisitBritain International Passenger Survey 2019
3. Tomorrow's Tourism / near. Sample of 117,445 residents and UK visitors to 7 locations in Buckinghamshire from 1 Jan – 31 Oct 22.

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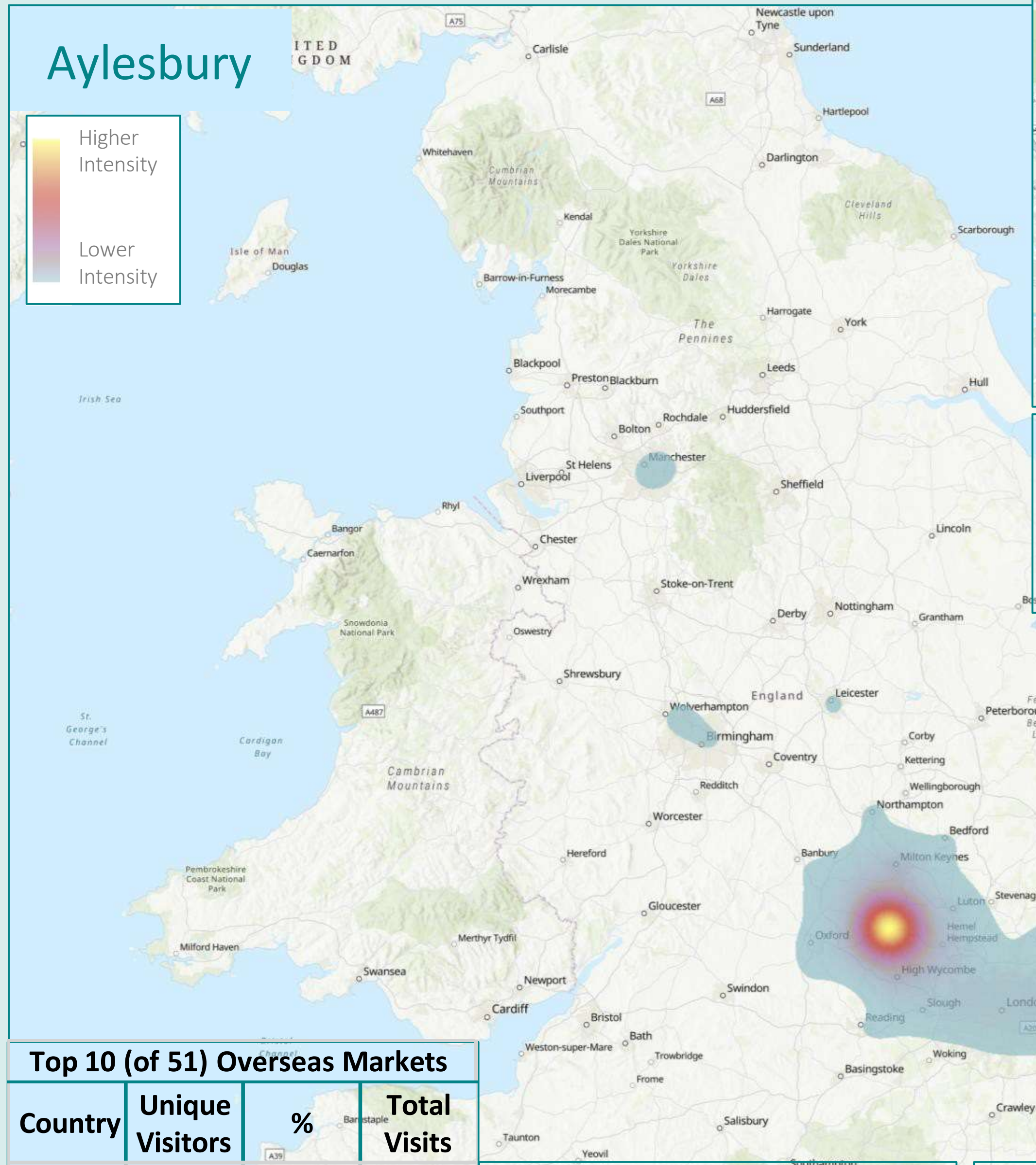
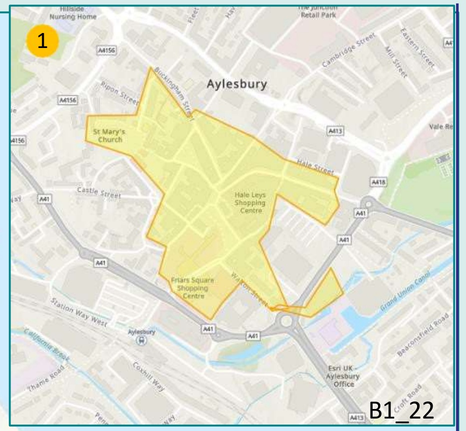
The Larger Towns – Aylesbury & High Wycombe

Aylesbury

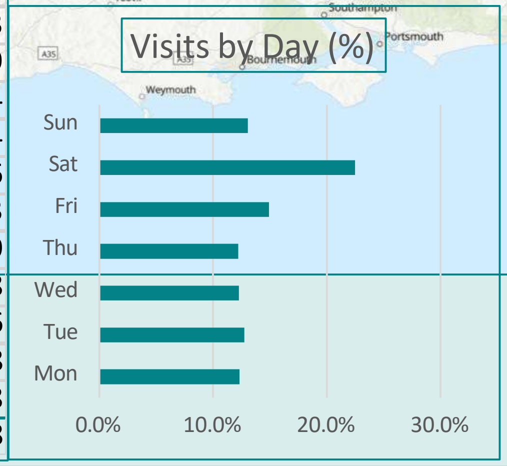


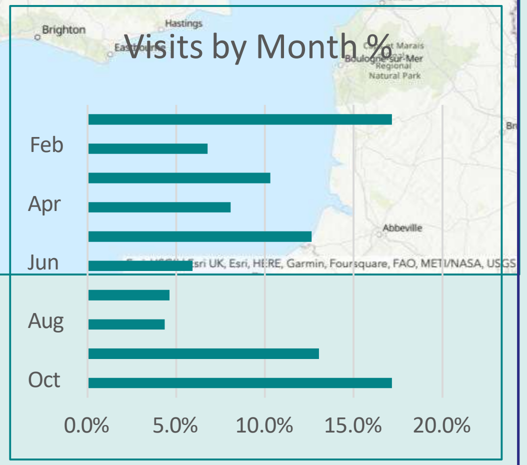


Heat map shows predominant home location of unique visitors to Aylesbury town centre as above. Date Range: 1 Jan 22 – 31 Oct 22. Sample size: 18,631 visitors & 9,587 residents

Top 10 (of 51) Overseas Markets

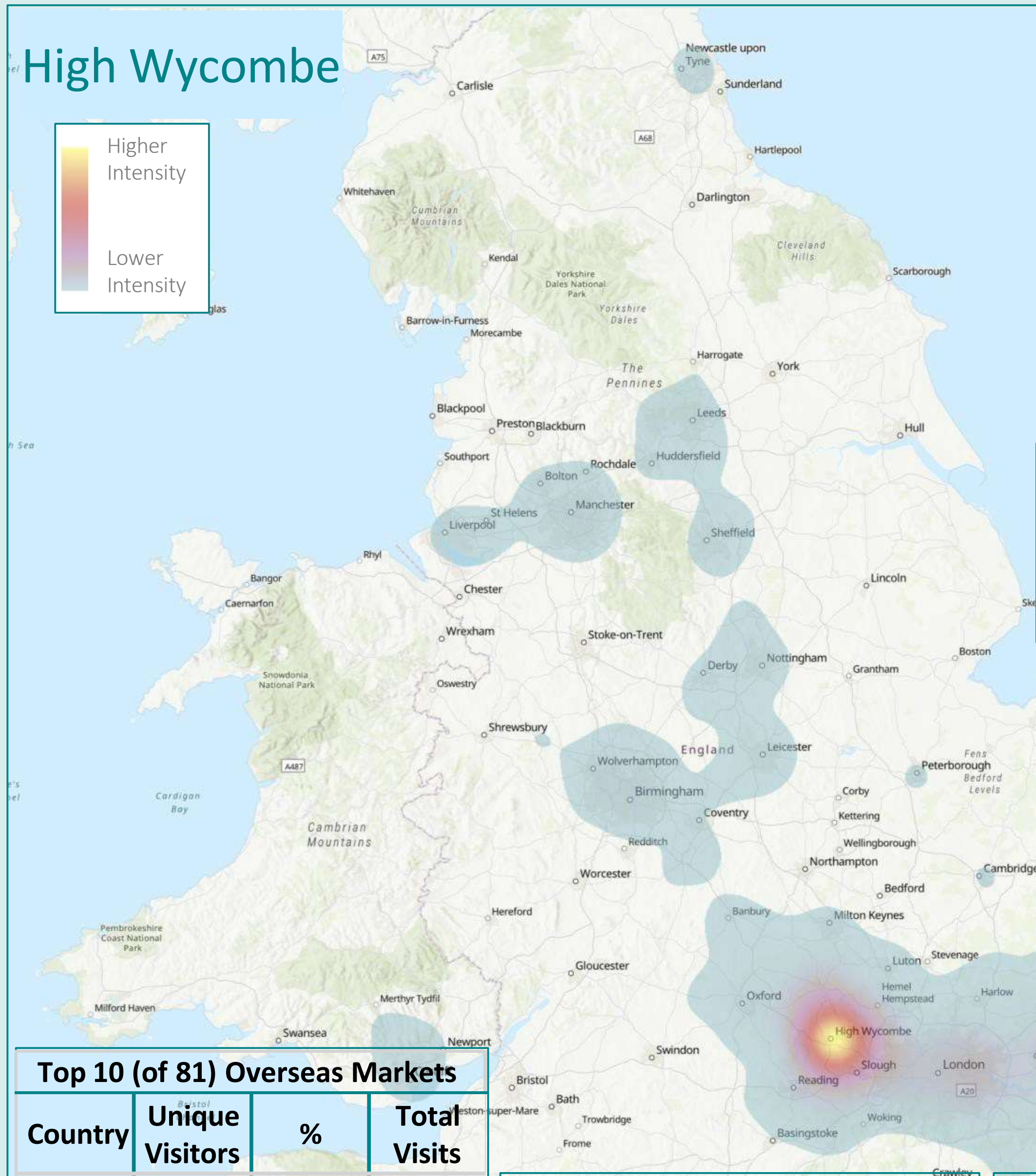
Country	Unique Visitors	%	Total Visits
USA	51	19.8%	143
ESP	41	16.0%	69
FRA	19	7.4%	54
DEU	13	5.1%	34
ITA	11	4.3%	26
PRT	9	3.5%	13
ROU	8	3.1%	9
NLD	7	2.7%	18
AUS	6	2.3%	6
BRA	6	2.3%	8
OTHER	86	33.5%	178
Total	**257**		**558**

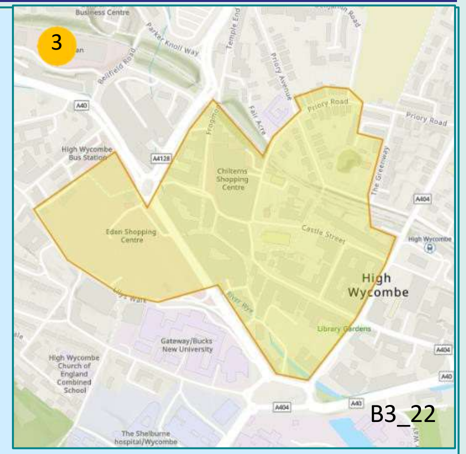




Visitor Type	Unique Visitors		Total Visits		Repeat Ratio
	#	%	#	%	
Resident - lives < 2 miles from central Aylesbury	9,587	34.0%	76,455	56.1%	8.0 :1
Local Day Visitor - lives >2 but <20 miles from central Aylesbury	11,591	41.1%	41,756	30.7%	3.6 :1
Regional Day Visitor - lives >20 but <100 miles from central Aylesbury	5,917	21.0%	15,605	11.5%	2.6 :1
National Day Visitor / Staying Tourist - lives >100 miles away	866	3.1%	1,789	1.3%	2.1 :1
Overseas Visitor - normally resident outside of the UK	257	0.9%	558	0.4%	2.2 :1

High Wycombe

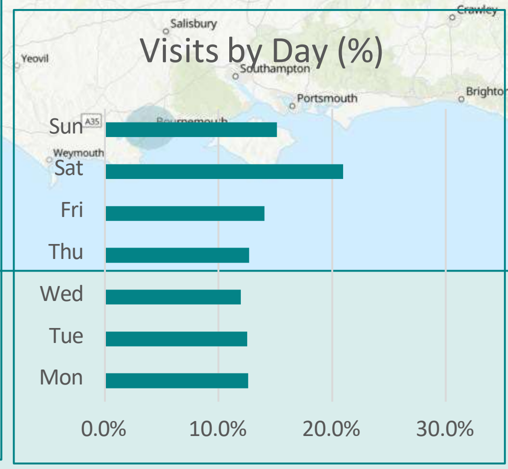


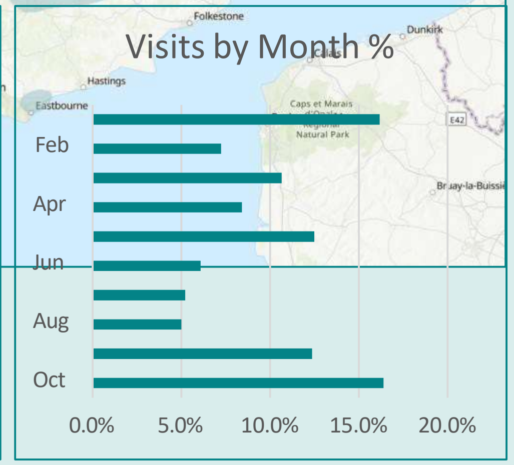


Heat map shows predominant home location of unique visitors to High Wycombe town centre as above. Date Range: 1 Jan 22 – 31 Oct 22. Sample size: 41,457 visitors & 10,010 residents

Top 10 (of 81) Overseas Markets

Country	Unique Visitors	%	Total Visits
USA	124	19.1%	274
ESP	77	11.9%	169
FRA	47	7.3%	58
ITA	39	6.0%	54
DEU	28	4.3%	41
AUS	20	3.1%	26
IND	17	2.6%	21
NLD	16	2.5%	30
ROU	14	2.2%	32
ARE	13	2.0%	23
OTHER	253	39.0%	429
Total	**648**		**1157**





Visitor Type	Unique Visitors		Total Visits		Repeat Ratio
	#	%	#	%	
Resident - lives < 2 miles from central High Wycombe	10,010	19.4%	102,405	41.7%	10.2 :1
Local Day Visitor - lives >2 but <20 miles from central High Wycombe	25,445	49.4%	100,652	40.9%	4.0 :1
Regional Day Visitor - lives >20 but <100 miles from central High Wycombe	13,198	25.6%	35,898	14.6%	2.7 :1
National Day Visitor / Staying Tourist - lives >100 miles away	2166	4.2%	5,714	2.3%	2.6 :1
Overseas Visitor - normally resident outside of the UK	648	1.3%	1,157	0.5%	1.8 :1

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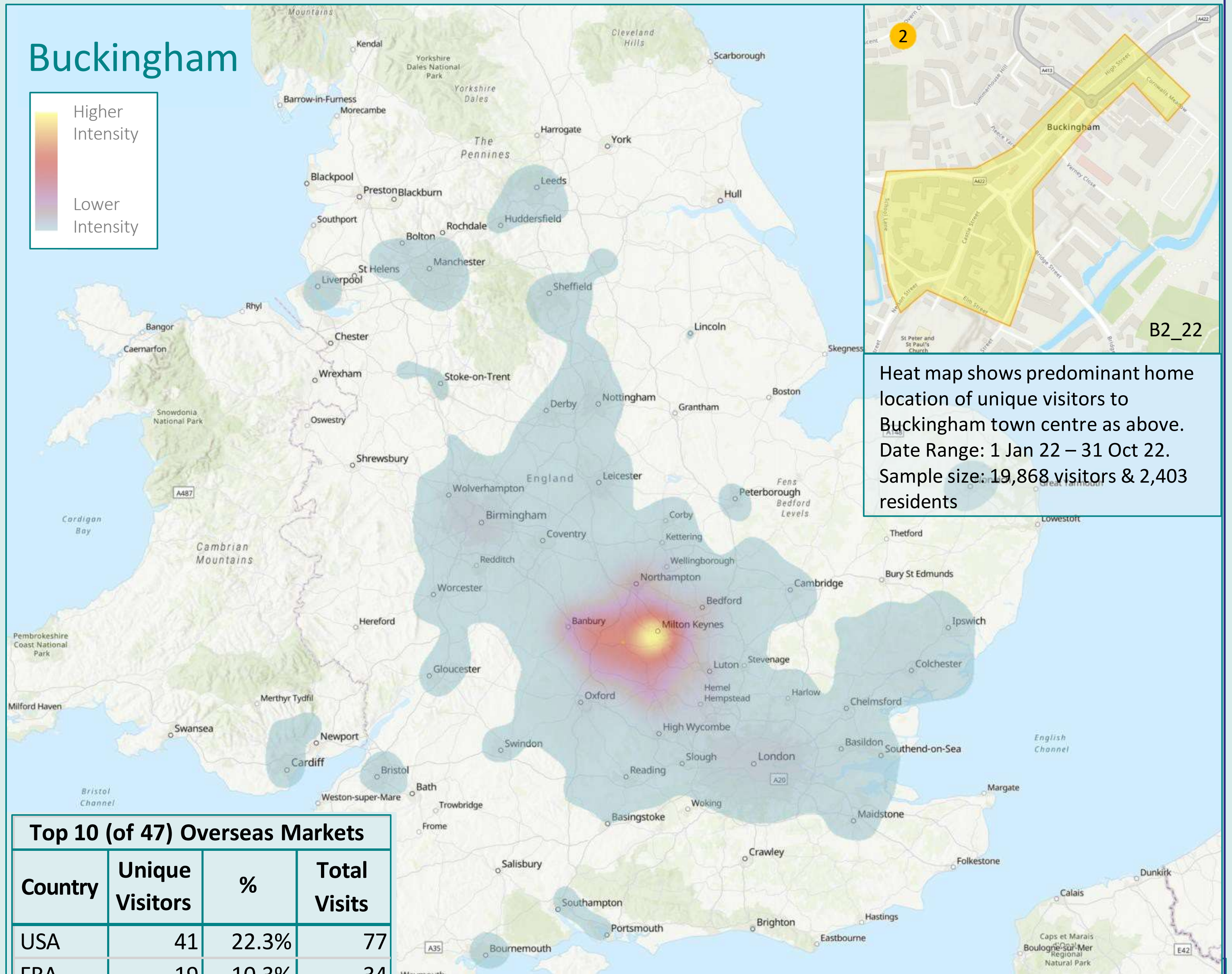
The Destination Towns – Buckingham & Marlow

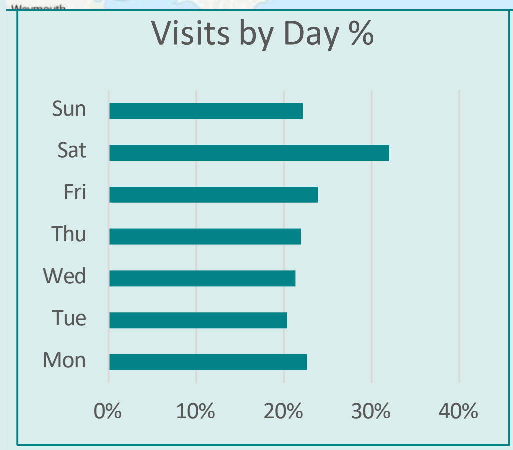
Buckingham

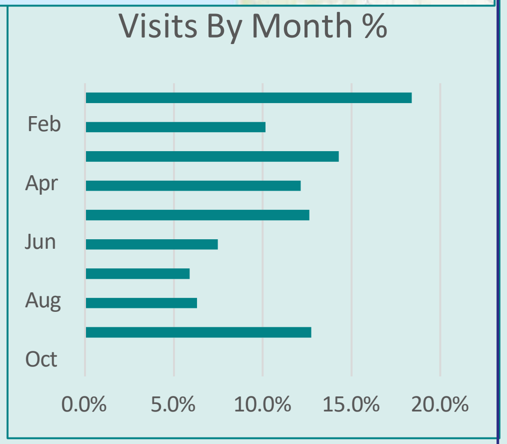


Heat map shows predominant home location of unique visitors to Buckingham town centre as above. Date Range: 1 Jan 22 – 31 Oct 22. Sample size: 19,868 visitors & 2,403 residents

Top 10 (of 47) Overseas Markets

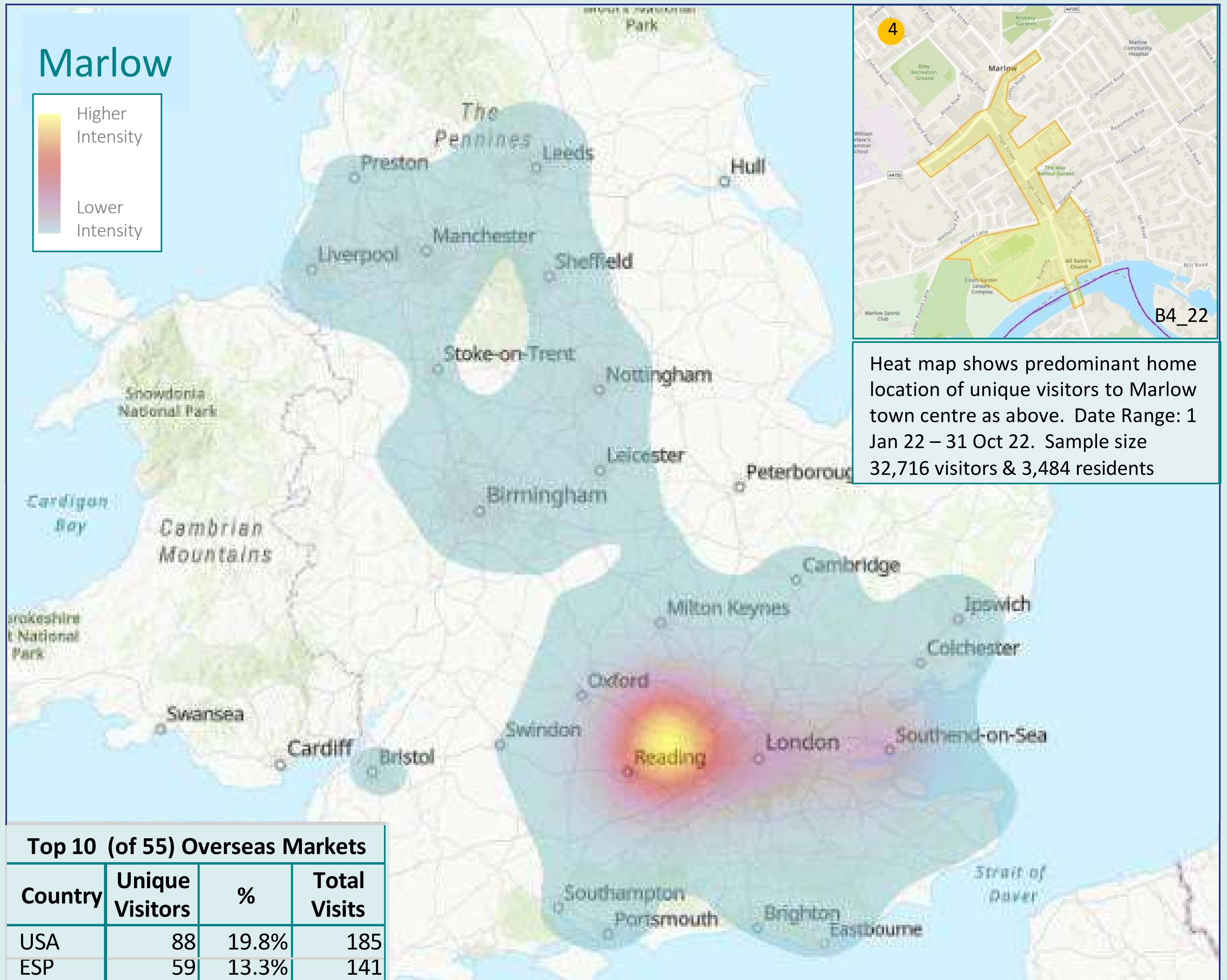
Country	Unique Visitors	%	Total Visits
USA	41	22.3%	77
FRA	19	10.3%	34
ESP	17	9.2%	20
NLD	10	5.4%	29
DEU	7	3.8%	7
AUS	6	3.3%	22
CAN	6	3.3%	7
ITA	6	3.3%	13
UKR	5	2.7%	7
ARE	4	2.2%	9
OTHER	63	34.2%	122
Total	**184**	**100%**	**347**





Visitor Type	Unique Visitors		Total Visits		Repeat Ratio
	#	%	#	%	
Resident - lives < 2 miles from Buckingham town centre	2,403	10.8%	41,459	37.8%	17.3 :1
Local Day Visitor - lives >2 but <20 miles from Buckingham town centre	11,418	51.3%	52,241	47.6%	4.6 :1
Regional Day Visitor - lives >20 but <100 miles from Buckingham town centre	7,348	33.0%	14,106	12.9%	1.9 :1
National Day Visitor / Staying Tourist - lives >100 miles away	918	4.1%	1,495	1.4%	1.4 :1
Overseas Visitor - normally resident outside of the UK	184	0.8%	347	0.3%	1.9 :1

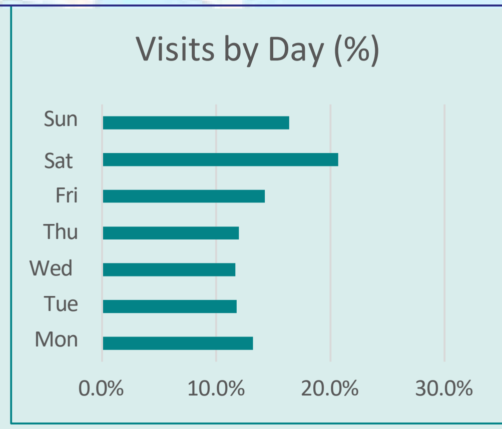
Marlow

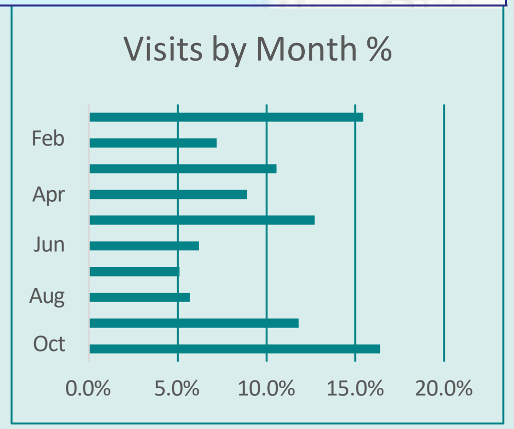


Heat map shows predominant home location of unique visitors to Marlow town centre as above. Date Range: 1 Jan 22 – 31 Oct 22. Sample size 32,716 visitors & 3,484 residents

Top 10 (of 55) Overseas Markets

Country	Unique Visitors	%	Total Visits
USA	88	19.8%	185
ESP	59	13.3%	141
FRA	52	11.7%	103
ITA	32	7.2%	78
DEU	20	4.5%	40
NLD	19	4.3%	26
AUT	13	2.9%	45
ARE	11	2.5%	32
AUS	10	2.2%	11
UKR	10	2.2%	16
Other	131	29.4%	215
Total	**445**	**100%**	**892**





Visitor Type	Unique Visitors		Total Visits		Repeat Ratio
	#	%	#	%	
Resident - lives < 2 miles from Marlow town centre	3,484	9.6%	54,923	32.3%	15.8 :1
Local Day Visitor - Lives >2 but <20 miles from town centre	21,180	58.5%	88,811	52.2%	4.2 :1
Regional Day Visitor - lives >20 but <100 miles from the area	9,438	26.1%	21,850	12.8%	2.3 :1
National Day Visitor / Staying Tourist - lives over 100 miles away	1,653	4.6%	3,697	2.2%	1.8 :1
Overseas Visitor - normally resident outside of the UK	445	1.2%	892	0.5%	2.0 :1

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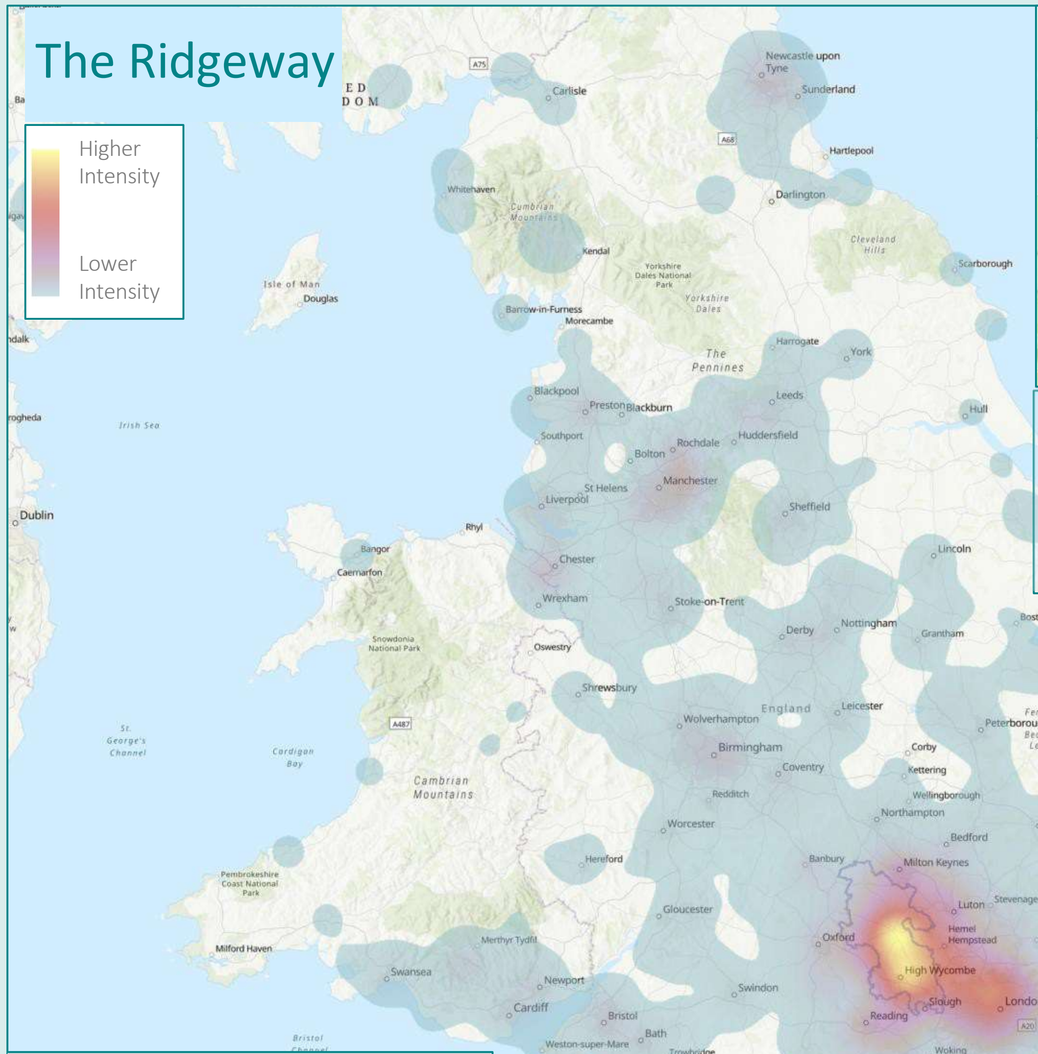
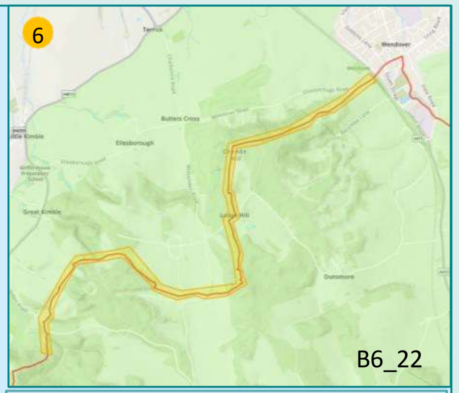
The Leisure Visitor – The Ridgeway & Waddesdon Manor

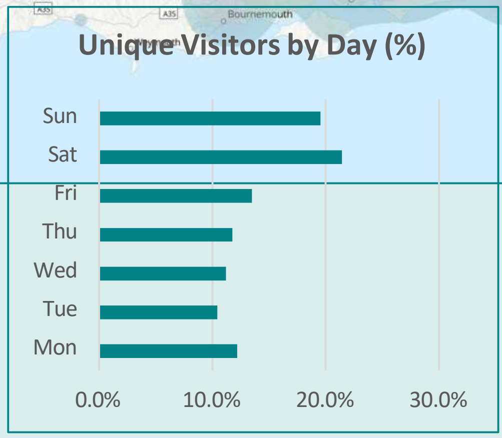


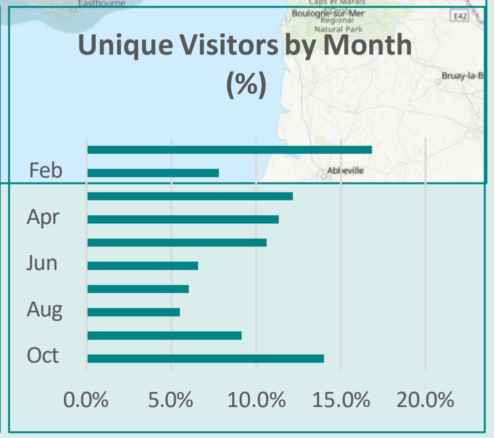


Heat map shows predominant home location of unique visitors to Coombe Hill, Ridgeway as above. Date Range: 1 Jan 22 – 31 Oct 22. Sample size 342 residents and 7,885 visitors.

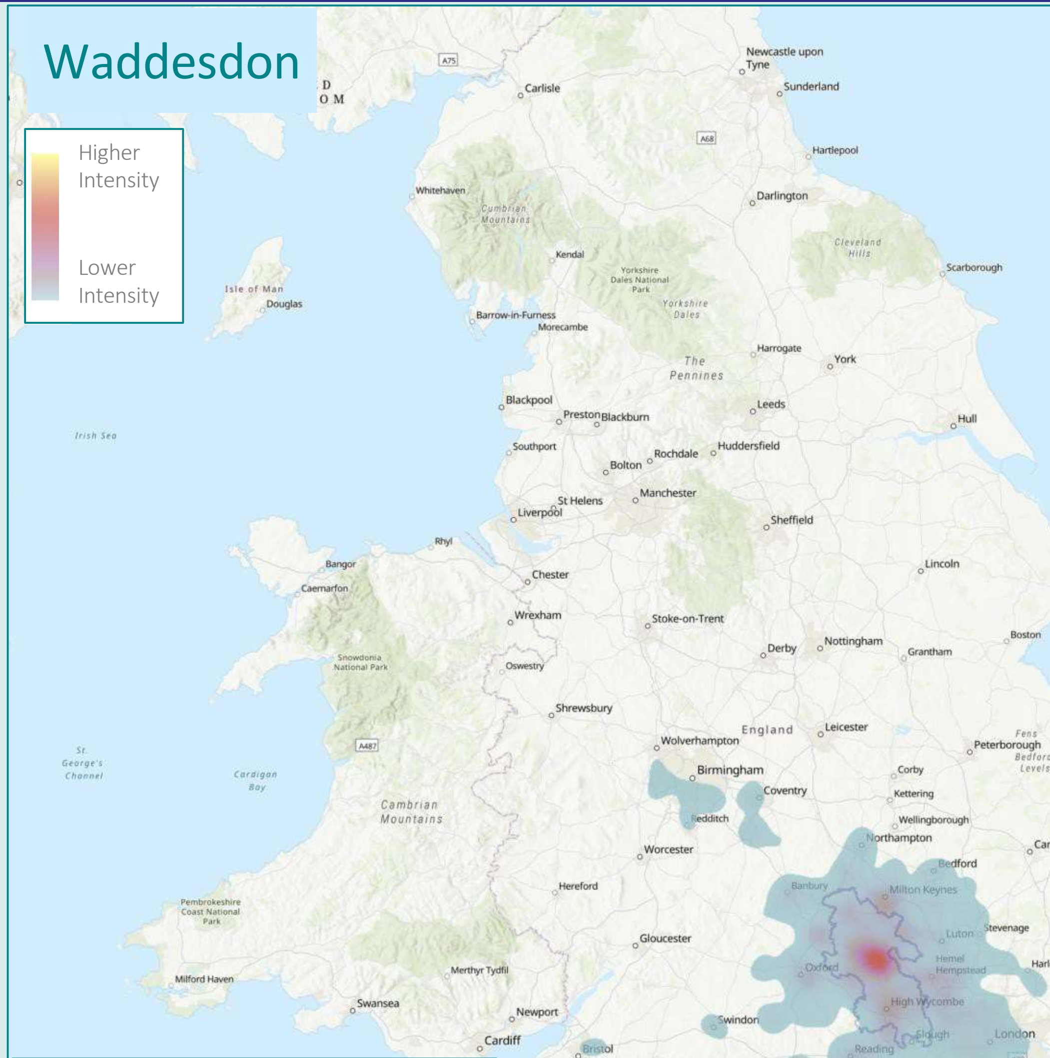
Top 10 (of 22) Overseas Markets

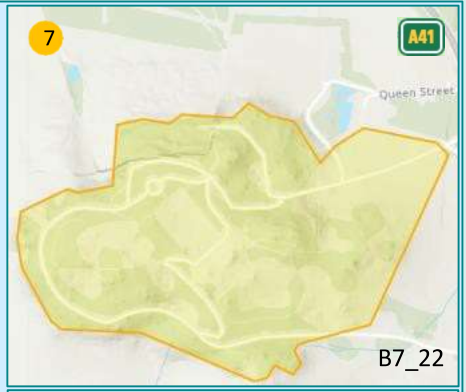
Country	Unique Visitors	%	Total Visits
USA	8	16.0%	9
NLD	7	14.0%	10
BRA	3	6.0%	5
ESP	3	6.0%	5
FRA	3	6.0%	4
ITA	3	6.0%	4
PRT	3	6.0%	3
ARE	2	4.0%	3
CAN	2	4.0%	2
FIN	2	4.0%	3
Other	14	28.0%	14
Total	**50**	**100%**	**62**





Visitor Type	Unique Visitors		Total Visits		Repeat Ratio
	#	%	#	%	
Resident - lives < 2 miles from the Coombe Hill - Ridgeway	342	4.2%	4,633	19.6%	13.5 :1
Local Day Visitor - lives >2 but <20 miles from Coombe Hill	5710	69.4%	15,424	65.2%	2.7 :1
Regional Day Visitor - lives >20 but <100 miles from Coombe Hill	1,906	23.2%	3,213	13.6%	1.7 :1
National Day Visitor / Staying Tourist - lives >100 miles away	219	2.7%	335	1.4%	1.5 :1
Overseas Visitor - normally resident outside of the UK	50	0.6%	62	0.3%	1.2 :1

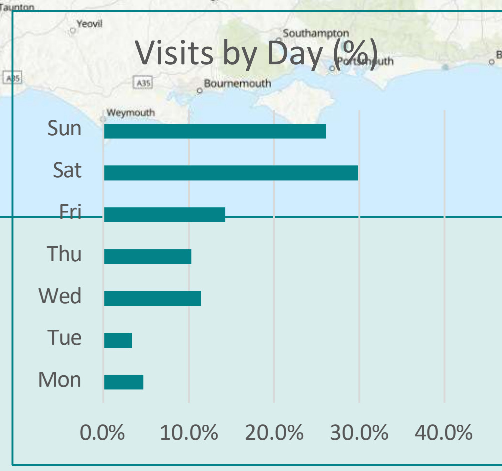


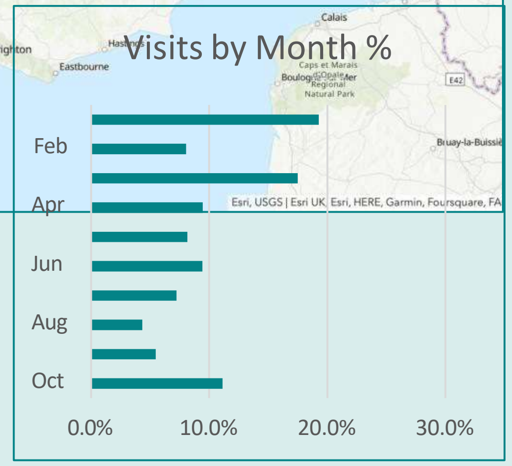


Heat map shows predominant home location of unique visitors to Waddesdon Manor as above. Date Range: 1 Jan 22 – 31 Oct 22. Sample size 95 residents and 3,554 visitors.

Top 10 (of 19) Overseas Markets

Country	Unique Visitors	%	Total Visits
USA	4	13.8%	4
ITA	3	10.3%	3
FRA	3	10.3%	3
NLD	2	6.9%	2
ESP	2	6.9%	2
CHE	2	6.9%	2
ZAF	1	3.4%	1
SWE	1	3.4%	1
RUS	1	3.4%	2
MDA	1	3.4%	1
Other	9	31.0%	16
Total	**29**	**100%**	**37**





Visitor Type	Unique Visitors		Total Visits		Repeat Ratio
	#	%	#	%	
Resident - lives < 2 miles from Waddesdon Manor	95	2.6%	503	7.4%	5.3 :1
Local Day Visitor - lives >2 but <20 miles from Waddesdon Manor	1,760	48.2%	3,727	54.8%	2.1 :1
Regional Day Visitor - lives >20 but <100 miles from Waddesdon Manor	1,656	45.4%	2,382	35.0%	1.4 :1
National Day Visitor / Staying Tourist - lives >100 miles away	109	3.0%	148	2.2%	1.4 :1
Overseas Visitor - normally resident outside of the UK	29	0.8%	37	0.5%	1.3 :1

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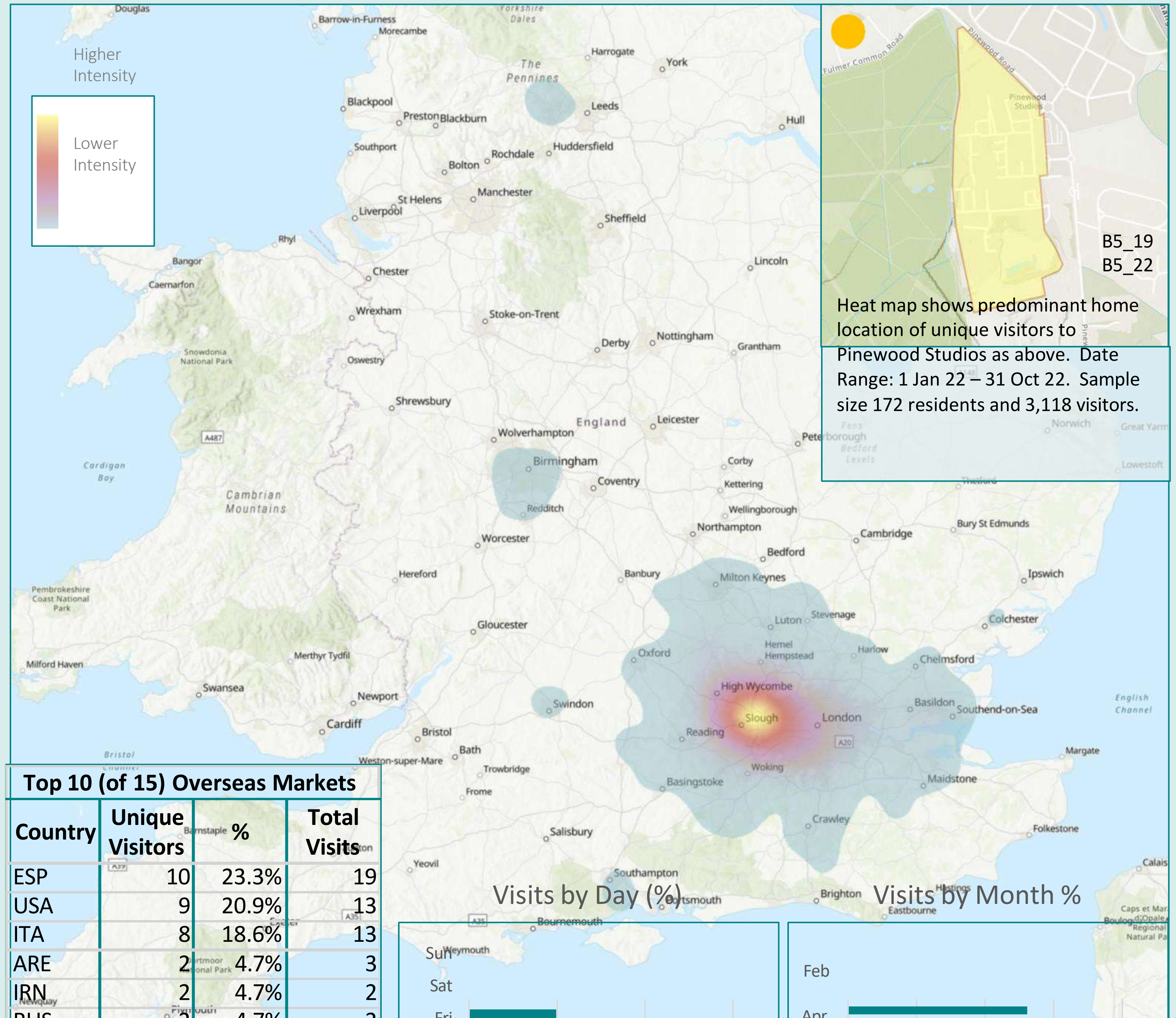
The Business Visitor – Pinewood Studios

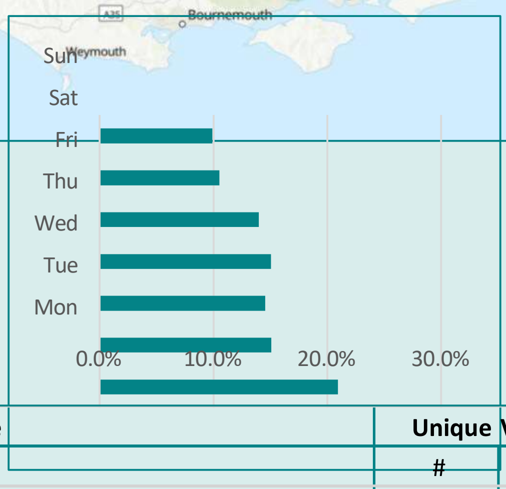


Heat map shows predominant home location of unique visitors to Pinewood Studios as above. Date Range: 1 Jan 22 – 31 Oct 22. Sample size 172 residents and 3,118 visitors.

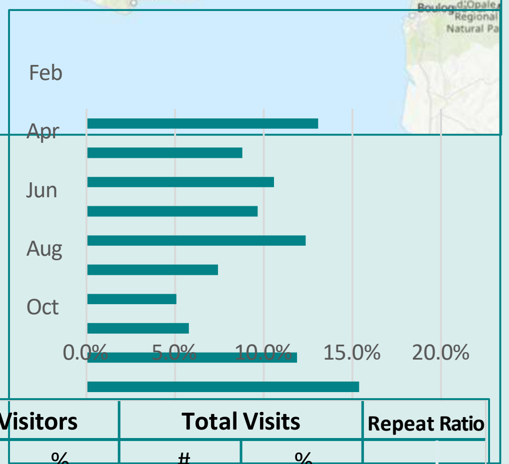
Top 10 (of 15) Overseas Markets

Country	Unique Visitors	%	Total Visits
ESP	10	23.3%	19
USA	9	20.9%	13
ITA	8	18.6%	13
ARE	2	4.7%	3
IRN	2	4.7%	2
RUS	2	4.7%	2
UKR	2	4.7%	3
AUS	1	2.3%	1
DEU	1	2.3%	1
DOM	1	2.3%	1
OTHER	5	11.6%	5
	43		**63**

Visits by Day (%)



Visits by Month %



Visitor Type	Unique Visitors		Total Visits		Repeat Ratio
	#	%	#	%	
Resident - lives < 2 miles from Pinewood Studios	172	5.2%	624	4.0%	3.6 :1
Local Day Visitor - lives >2 but <20 miles from Pinewood Studios	1,958	59.5%	10,191	64.6%	5.2 :1
Regional Day Visitor - lives >20 but <100 miles from Pinewood Studios	965	29.3%	4,414	28.0%	4.6 :1
National Day Visitor / Staying Tourist - lives >100 miles away	152	4.6%	473	3.0%	3.1 :1
Overseas Visitor - normally resident outside of the UK	43	1.3%	63	0.4%	1.5 :1

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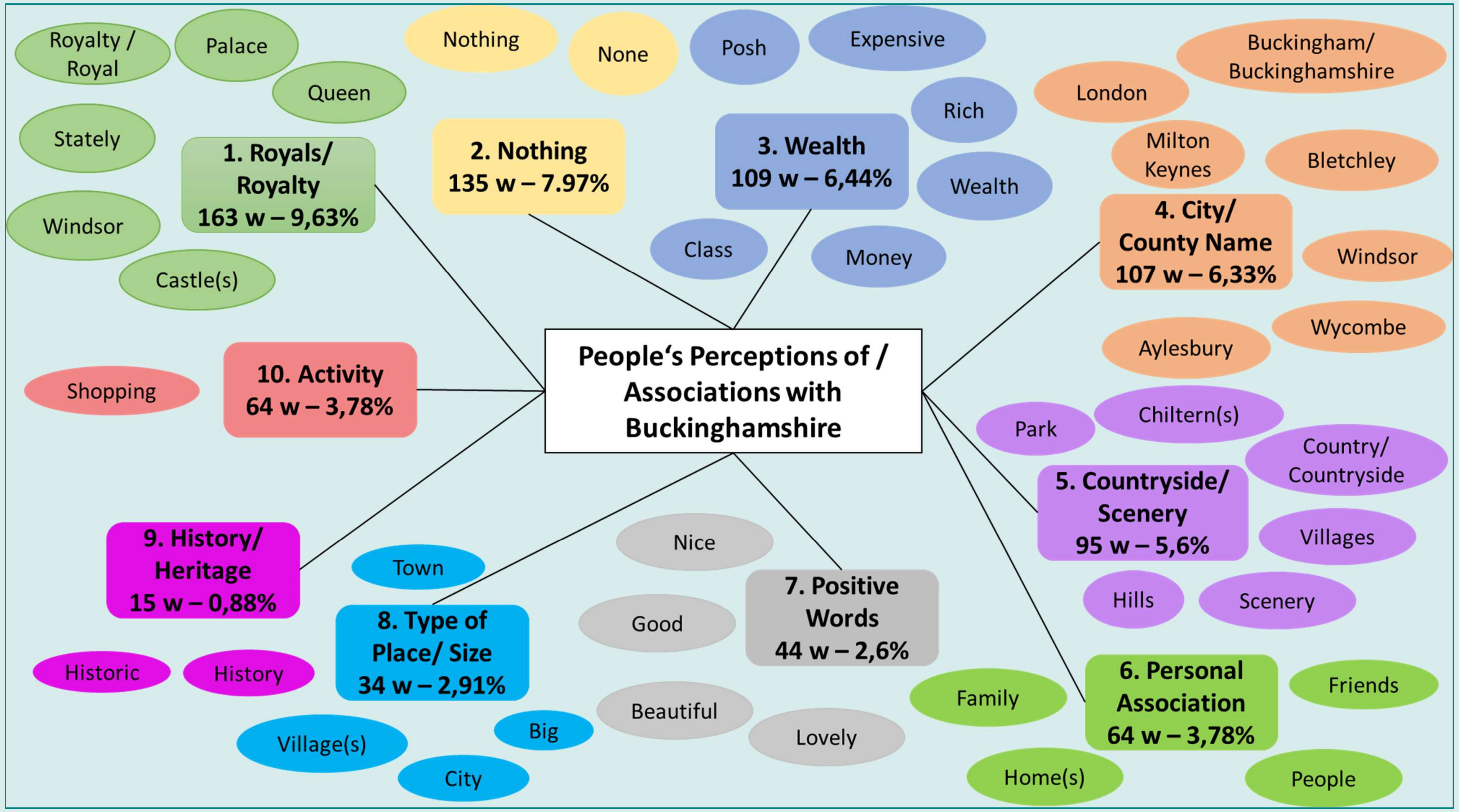
Perceptions of Buckinghamshire

Word	Quantity	Weighted Percentage %
Nothing/ None	127	7,5
Queen	50	2,96
Posh	47	2,78
Countryside	39	2,3
Expensive	33	1,95
Palace	32	1,89
Milton Keynes	27	1,6
Family	26	1,54
London	25	1,48
Royalty	24	1,42
Nice	22	1,3
Buckingham	19	1,12
Royal	17	1
Houses	14	0,83
Castle	13	0,77
Home	13	0,77
Country	12	0,71
People	12	0,71
Villages	12	0,71
Buckinghamshire	11	0,65
Rich	10	0,59
Good	9	0,53
Town	9	0,53
Beautiful	8	0,47
Castles	8	0,47
City	8	0,47
History	8	0,47
Scenery	8	0,47
Wycombe	8	0,47
Chiltern	7	0,41
Historic	7	0,41
Homes	7	0,41
Money	7	0,41
Stately	7	0,41
Wealth	7	0,41
Windsor	7	0,41
Chilterns	6	0,35
Friends	6	0,35
Hills	6	0,35
Aylesbury	5	0,3
Big	5	0,3
Bletchley	5	0,3
Class	5	0,3
Lovely	5	0,3
Park	5	0,3
Queens	5	0,3
Shopping	5	0,3



1. The largest proportion of responses (9.6%) falsely associate Buckinghamshire with royalty. (Words such as "Palace", "Queen", royalty" are regularly quoted).
2. The second largest proportion of the sample (7.9%) do not know anything or very little about Buckinghamshire.
3. The third response relates to wealth (6.4%) with words such as "posh", "expensive" and "rich" used extensively.
4. 6.3% of people think of the towns, quoting Aylesbury, Buckingham and Wycombe but also, erroneously, Windsor and London.
5. The only activity that is mentioned five times or more is shopping but that is also likely to be misattributed as it reflects Milton Keynes as a key regional shopping centre which is not in Buckinghamshire's unitary area.
6. 5.6% of respondents associate the county with the Chilterns, the nice countryside, its villages and scenery.
7. Amongst other findings:
   - 4.4% of respondents relate Buckinghamshire to wealth. Example: "A rather upscale expensive area so unlikely to visit."
   - 3,78% of all respondents visit friends or family in Buckinghamshire.
   - Positive words on the county do feature but are lower down the list. Only one respondent mentioned restaurants.
8. In general, many perceptions of the county are either based on incorrect assumptions (royalty, location), no knowledge of the place, or a particular view of the wealth of the inhabitants.

Notes:
1. All words mentioned five times or more are included in figure to the left.
2. Words such as 'lot' or 'really' are not considered in the figure.
3. The percentage indicates the weighted percentage (e.g. 9.63% for the most mentioned topic) and the number indicates the word count of the words associated with the topic (163 words associated with Royals/Royalty).

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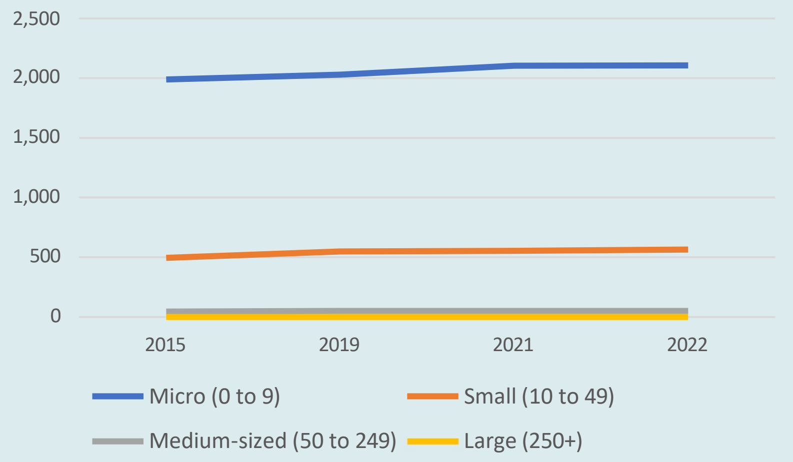
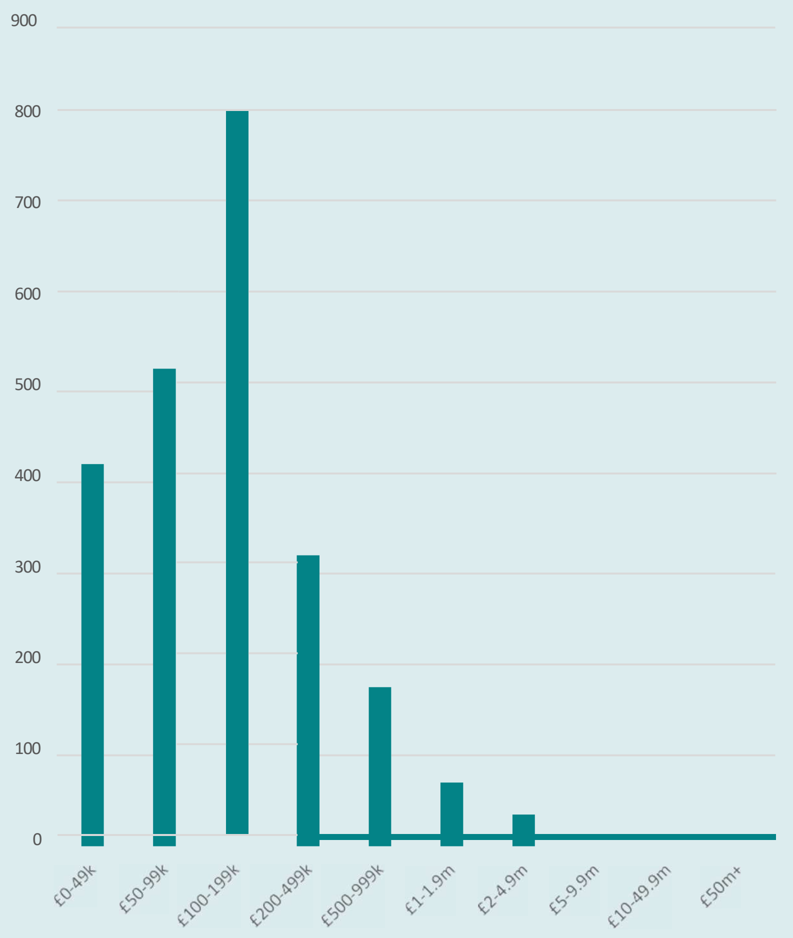
Businesses in Buckinghamshire's Visitor Economy

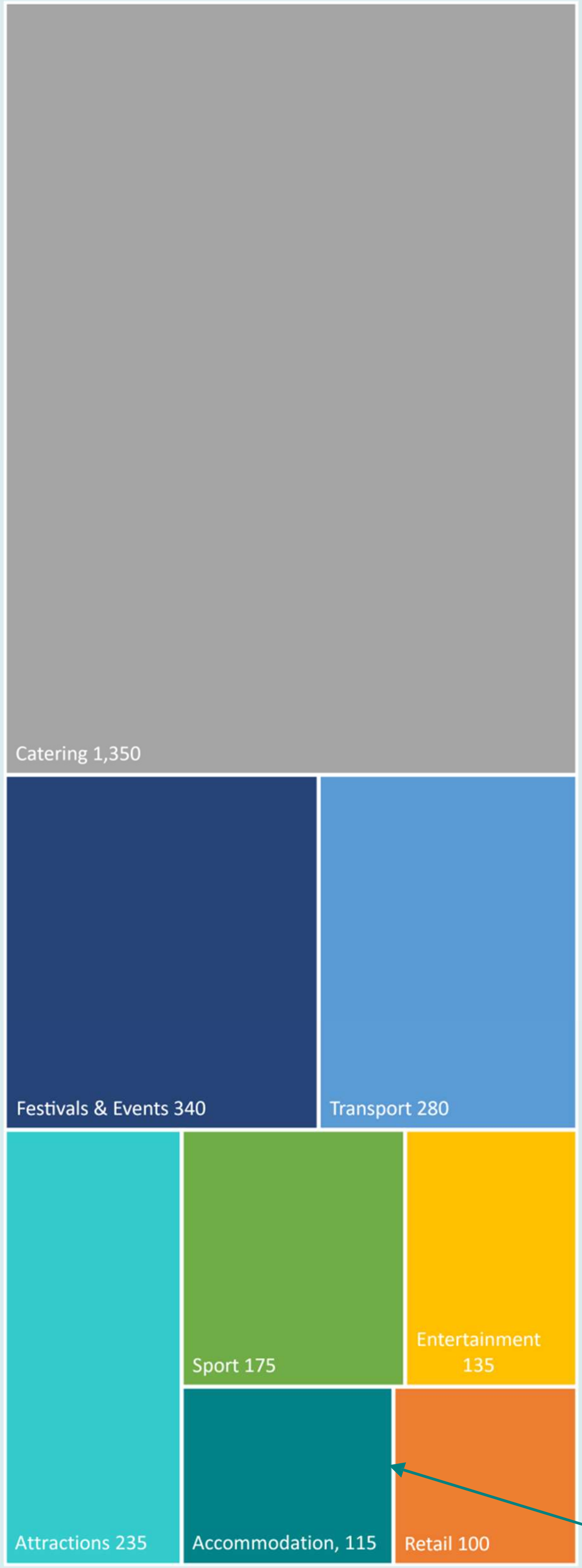
Growth of Formal Visitor Economy Businesses
(by No. of Employees)



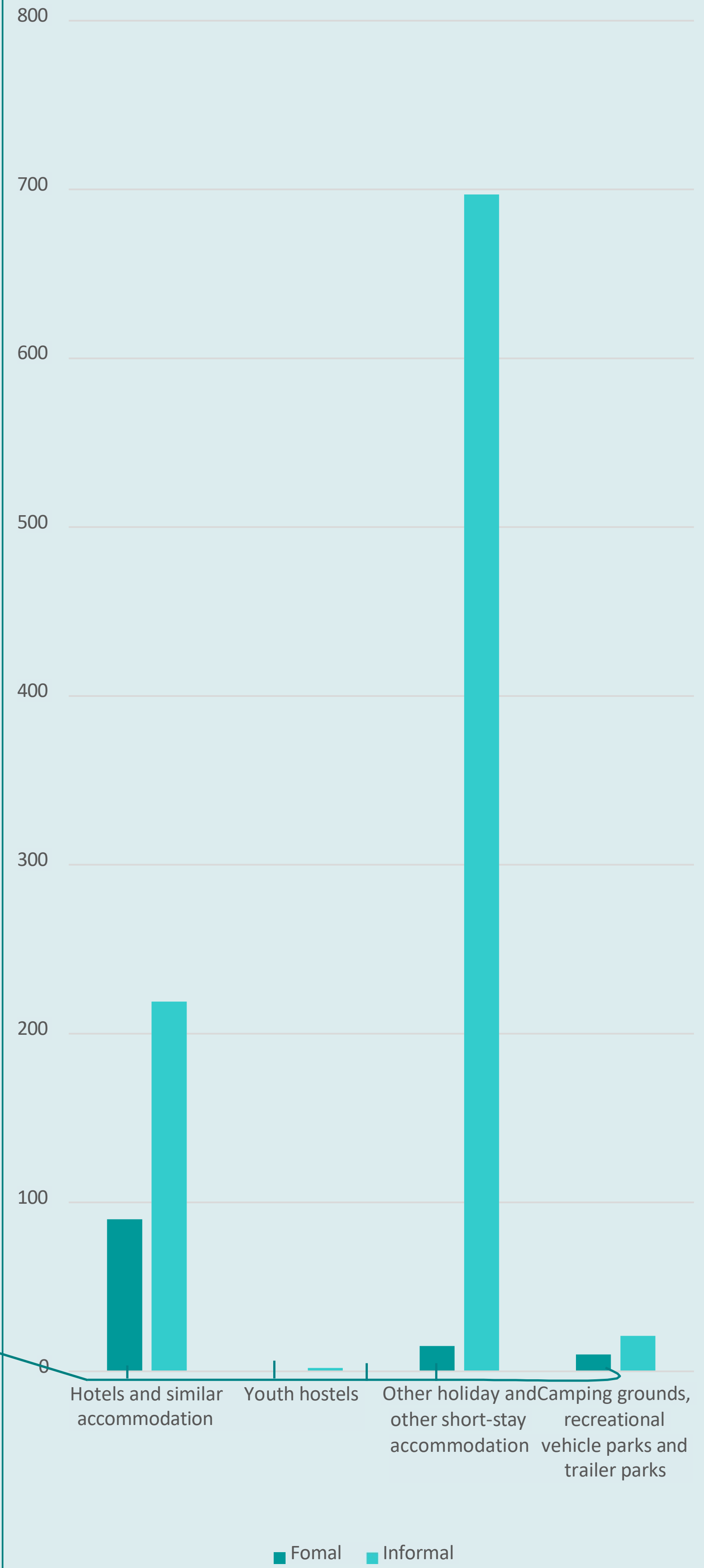
Breakdown of the Formal Visitor Economy Businesses by Turnover
(No. of Enterprises)



Number of Businesses in the Formal Visitor Economy



Accommodation Sector - the Relative Size of the Formal and Informal Economies



1. There are 2,730 business units in the formal visitor economy in Buckinghamshire, i.e. those with VAT and/or PAYE records. Numbers grew by 4% between 2019 and 2022.
2. The visitor economy sector is skewed towards micro-enterprises even in the formal economy. The charts to the far left show that distribution in terms of number of employees and business size in terms of turnover.
3. There are a significantly higher number of catering businesses than any other sector. The ONS data reports 1,350 businesses retailing or serving food and drink, making up almost 50% of all businesses. The Food Standards Agency has 1,464 establishments listed in the area, 922 of which are cafés and restaurants. We estimate that visitor spending will be providing some 20% of the income of these businesses.
4. The informal accommodation sector is dominated by self-catering, using second homes and buy to let accommodation run by owner-operators, many of whom will operate outside the PAYE / VAT systems.

Notes:
1. The split between formal & informal accommodation has been calculated by reference to the asset audit (see the Accommodation Sector bar chart). The audit is an accurate overview of >95% of the accommodation sector. The informal sector is calculated by subtracting the ONS data from the total number of operations.

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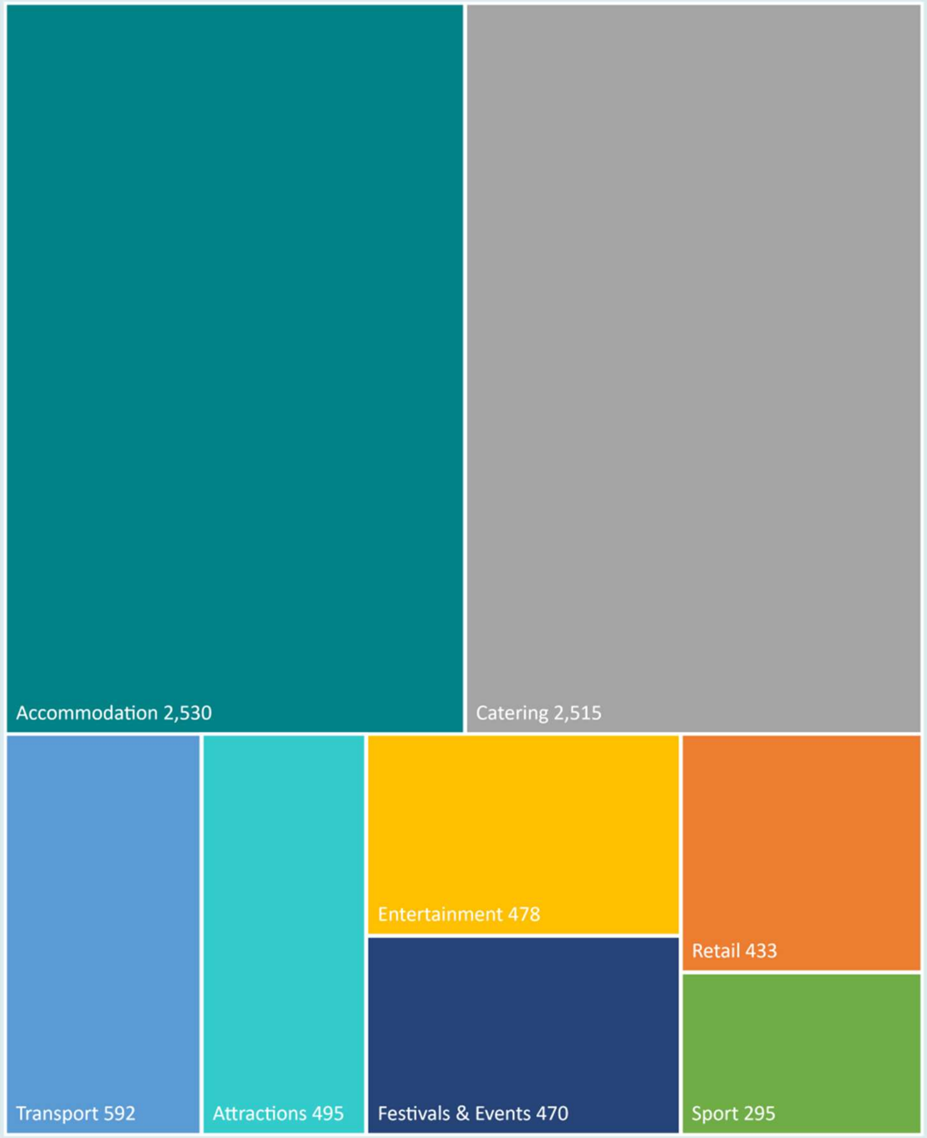
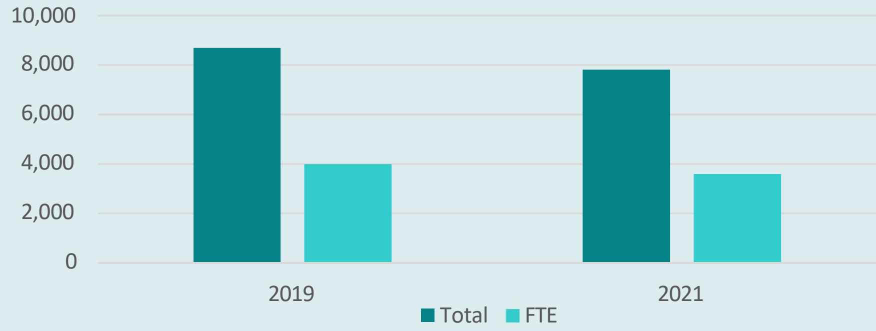
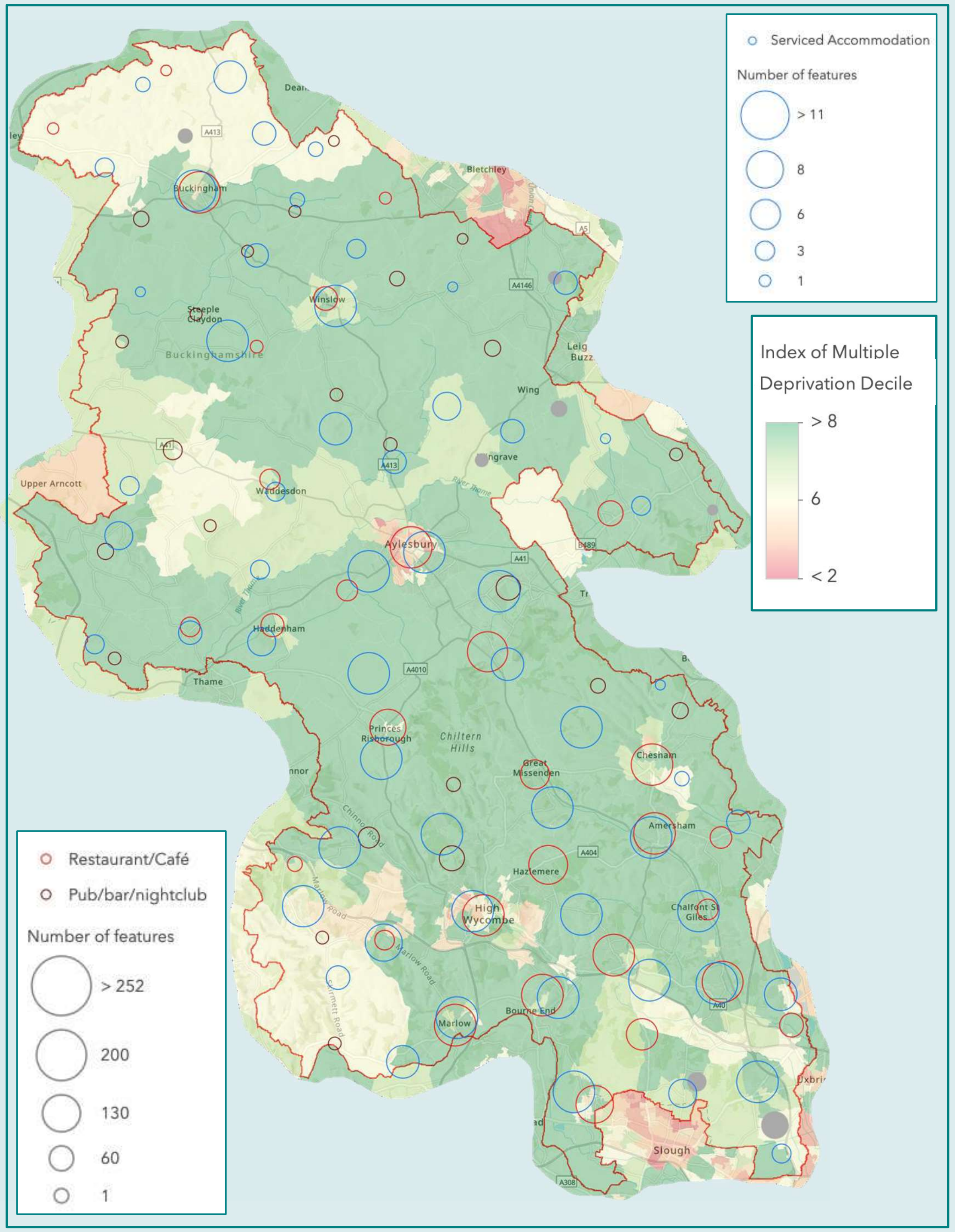
Employment in Buckinghamshire's Visitor Economy

Fig 1. Visitor Economy Employment by Sector



Direct Employment in Buckinghamshire's Visitor Economy





Notes:

1. The dataset is the ONS Business Register and Employment Survey (safeguarded access) as of April 2021 drawn from NOMIS. It is a survey of the number of jobs held by employees and the figures include businesses registered for PAYE. The employment numbers include both full-time and part-time and have not been converted to full-time equivalents.
2. Methodology - Each of 45 SIC codes relating to the visitor economy was selected. Some, such as accommodation and travel agency for example, can be considered to be 100% related to the visitor economy. Others, such as restaurants and bars, which see local population usage, had a factor applied to estimate usage by tourists. In the case of restaurants it is estimated that 20% of sector turnover is sustained by visitors. See Appendix 1.
3. Source – Business Register and Employment Survey (NOMIS accessed 07/12/22) – reports the extent of the formal visitor economy (PAYE / VAT businesses).

1. Fig. 1 shows total employment in the tourism economy as defined by the ONS. This does not include employment in the informal visitor economy.
2. Appendix 1 gives a detailed breakdown of jobs underpinned by visitor spending. We calculate two different metrics:
   - The broad Visitor Economy which is drawn from the ONS defined SIC codes as shown in Appendix 1 where some 21,000 jobs are sustained by spending in these service related businesses.
   - From this estimate we also calculate the Direct Jobs that are likely to be underpinned solely by the expenditure of visitors to Buckinghamshire as well as those that are on day trips within the County. This gives an estimated 7,807 jobs sustained directly by the tourism economy in the County.
3. These direct tourism related jobs across the County equate to 3,591 jobs when measured on a Full Time Equivalent basis.
4. This assessment is a snapshot in time reflecting visitor economy employment in 2021. There was a reduction of 3% in total employment and a 10% reduction in full time employment from 2019 to 2021 reflecting the COVID crisis.
5. Figure 1 shows that of total visitor economy employment in the County, 32% is provided by the accommodation sector and almost the same number again is provided by the food and drink sector.
6. The map shows clusters of serviced accommodation and food & drink establishments (as two of the main visitor economy employers) over the index of multiple deprivation - where green is less deprived and red more deprived.
7. In general, the County is less deprived than many nearby areas although at this level the map may mask pockets of deprivation in the study area. Tourism can create jobs rapidly and can support areas that have fallen behind.

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Methodological Notes

ONS Crown Copyright Reserved [from Nomis on 07 December 2022] - Employment Estimates within the Formal Visitor Economy	Buckinghamshire		
Safeguarded access	Unmodulated	Visitor Weighting Factor %	Direct Jobs TT Estimate
Industry Code			
55100 : Hotels and similar accommodation	2,500	100%	2,500
55201 : Holiday centres and villages	0	100%	0
55202 : Youth hostels	0	100%	0
55209 : Other holiday and other short-stay accommodation	10	100%	10
55300 : Camping grounds, recreational vehicle parks and trailer parks	15	100%	15
55900 : Other accommodation	5	100%	5
56101 : Licensed restaurants	3,500	20%	700
56102 : Unlicensed restaurants and cafes	2,250	20%	450
56103 : Take away food shops and mobile food stands	1,500	20%	300
56210 : Event catering activities	800	20%	160
56290 : Other food service activities	800	20%	160
56301 : Licensed clubs	225	20%	45
56302 : Public houses and bars	3,500	20%	700
49100 : Passenger rail transport, interurban	200	50%	100
49311 : Urban, suburban or metropolitan area passenger railway transportation by underground, metro and similar systems	10	20%	2
49319 : Urban, suburban or metropolitan area passenger land transport other than railway transportation by underground, metro and similar systems	700	20%	140
49320 : Taxi operation	400	50%	200
49390 : Other passenger land transport nec	400	20%	80
50100 : Sea and coastal passenger water transport	10	50%	5
50300 : Inland passenger water transport	20	50%	10
51101 : Scheduled passenger air transport	0	50%	0
51102 : Non-scheduled passenger air transport	35	50%	18
77110 : Renting and leasing of cars and light motor vehicles	75	50%	38
77210 : Renting and leasing of recreational and sports goods	75	50%	38
77341 : Renting and leasing of passenger water transport equipment	0	50%	0
77351 : Renting and leasing of passenger air transport equipment	5	50%	3
79110 : Travel agency activities	225	100%	225
79120 : Tour operator activities	125	100%	125
79901 : Activities of tourist guides	5	100%	5
79909 : Other reservation service activities (not including activities of tourist guides)	75	100%	75
68202 : Letting and operating of conference and exhibition centres	150	100%	150
82301 : Activities of exhibition and fair organizers	125	100%	125
82302 : Activities of conference organizers	75	100%	75
90010 : Performing arts	350	20%	70
90020 : Support activities to performing arts	250	20%	50
90030 : Artistic creation	250	20%	50
90040 : Operation of arts facilities	100	20%	20
91020 : Museum activities	150	100%	150
91030 : Operation of historical sites and buildings and similar visitor attractions	150	100%	150
91040 : Botanical and zoological gardens and nature reserve activities	75	100%	75
93210 : Activities of amusement parks and theme parks	50	100%	50
93290 : Other amusement and recreation activities	800	50%	400
92000 : Gambling and betting activities	200	20%	40
93110 : Operation of sports facilities	1,250	20%	250
93199 : Other sports activities (not including activities of racehorse owners)	225	20%	45
Column Total	21,665		7,807
		FTE Total	3,591

Notes:

1. table shows the SIC codes relating to the visitor economy, together with a weighting, that derive the direct jobs figures presented on Page 20. The weighting applied is prudent across the County. In some destinations visitor relating spending in e.g., restaurants & cafes will be much higher than 20%.
2. No high / low ranges have been applied to the estimated figures. Giving such a range could be helpful in strategic terms.

1. The formal visitor economy is defined in this report as companies registered with the PAYE system and sampled as part of the ONS Business Register & Employment Survey. Data is from 2021. The informal visitor economy is all those businesses that have been identified as having a web presence but that are not part of the formal visitor economy.
2. Every effort has been made to ensure accuracy of the data contained within this report. However, with over 2,800 assets recorded from multiple sources, some inaccuracy is inevitable. Our apologies if any tourism assets have been misrepresented. Any errors at the individual asset level do not affect the strategic assessment.

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