

A Strategy and Action Plan for Sustainable Tourism in the Cotswolds Area of Outstanding Natural Beauty 2011 - 2016



This document has been prepared as part of the Cotswolds Conservation Board's application for the European Charter for Sustainable Tourism, December 2010

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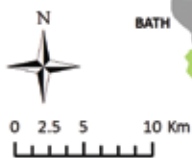
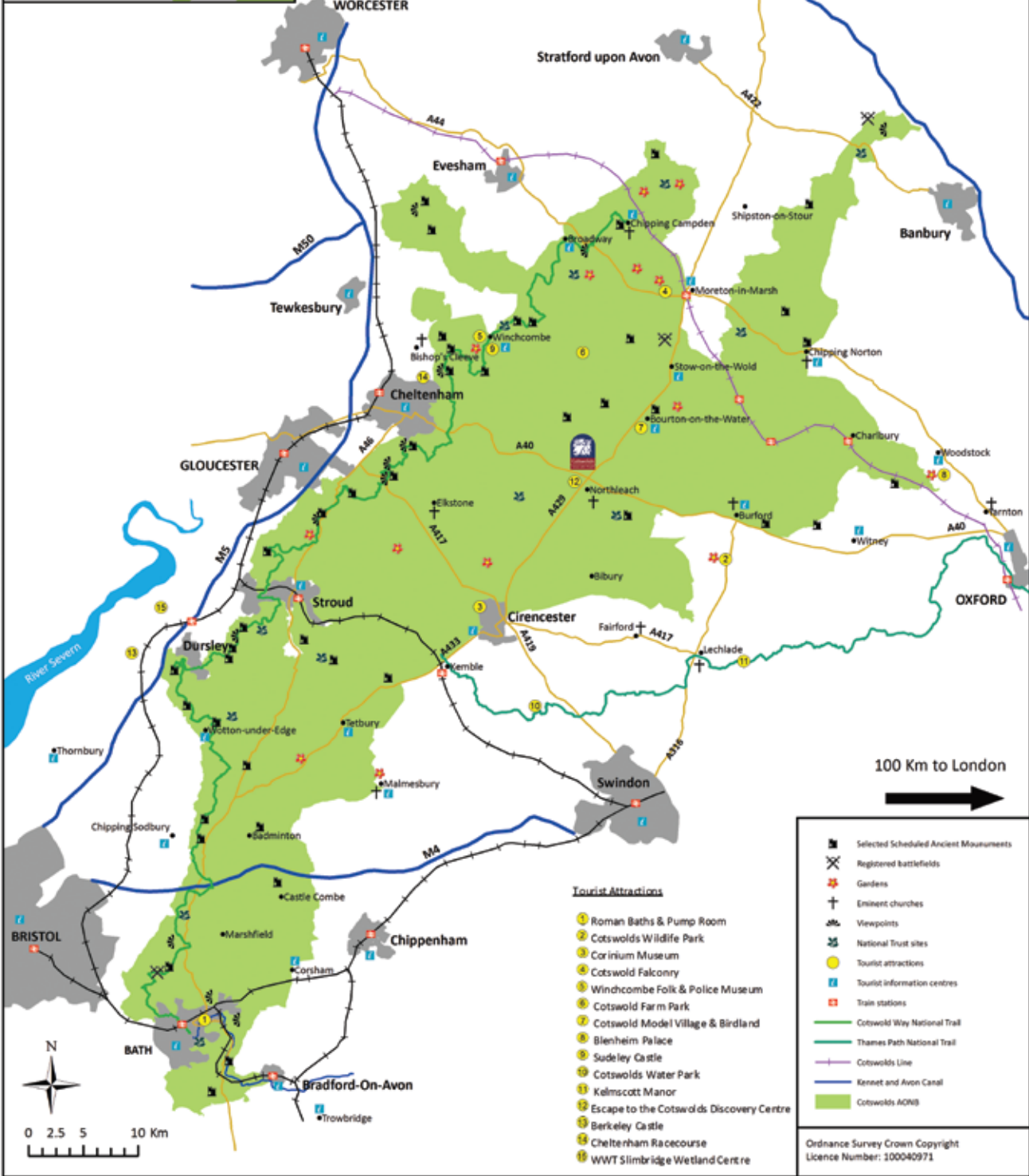


Cotswolds Area of Outstanding Natural Beauty



↑ 50 Km to Birmingham

→ 100 Km to London

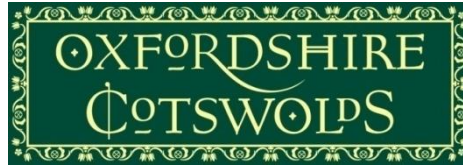


- Tourist Attractions**
- 1 Roman Baths & Pump Room
 - 2 Cotswolds Wildlife Park
 - 3 Corinium Museum
 - 4 Cotswold Falconry
 - 5 Windcombe Folk & Police Museum
 - 6 Cotswold Farm Park
 - 7 Cotswold Model Village & Birdland
 - 8 Blenheim Palace
 - 9 Sudeley Castle
 - 10 Cotswolds Water Park
 - 11 Kilmescott Manor
 - 12 Escape to the Cotswolds Discovery Centre
 - 13 Berkeley Castle
 - 14 Cheltenham Racecourse
 - 15 WWT Slimbridge Wetland Centre

- Selected Scheduled Ancient Monuments
- Registered battlefields
- Gardens
- Eminent churches
- Viewpoints
- National Trust sites
- Tourist attractions
- Tourist information centres
- Train stations
- Cotswold Way National Trail
- Thames Path National Trail
- Cotswolds Line
- Kennet and Avon Canal
- Cotswolds AONB

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The Cotswolds Area of Outstanding Natural Beauty Sustainable Tourism Strategy and Action Plan has been developed in partnership with the following organisations:



National Trust



COTSWOLD
DISTRICT COUNCIL



VISIT WILTSHIRE

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EXECUTIVE SUMMARY

The Cotswolds Area of Outstanding Natural Beauty (AONB) is the largest of 46 AONBs in the UK, designated for its exceptional high-quality landscape. It is England's second largest protected landscape and one which is seen by many, especially overseas visitors, as representing the quintessential English countryside with honey-coloured historic villages and a diverse landscape of dramatic escarpment, expansive hills, secluded valleys and extensive network of walled fields. Tourism is critical for the socio-economic well being of the Cotswolds. It provides an essential source of income for businesses and communities both within and around the AONB, with world renowned visitor destinations of Bath, Oxford and Shakespeare's Stratford-on-Avon on its doorstep.

This strategy and action plan provides a framework for the development and management of tourism in the Cotswolds Area of Outstanding Natural Beauty. It is based on the principles of sustainability which take into account the need to conserve the area's environment and special features and to maintain the quality of life of its local communities, while growing the sector.

In developing this strategy, a detailed assessment of the Cotswolds' tourism resources, needs and opportunities has been undertaken and has involved wide consultation with a range of stakeholders and local interests in and around the AONB.

The strategy reflects local and national policies for tourism and builds on the relevant priorities outlined in the Cotswolds AONB Management Plan. It has also been developed in accordance with the 12 principles of the European Charter for Sustainable Tourism in Protected Areas and forms the basis of an application by the Cotswolds Conservation Board for the Cotswolds AONB to be recognised by this Charter.

In the light of this, conserving the Cotswolds' special qualities and widening understanding of them, while supporting local communities and generating income for the area, should be the basis on which tourism is developed.

The following strategic aims underpin the strategy:

- For the Cotswolds to be recognised as an exemplar in sustainable tourism.
- For visitors to gain a greater awareness and understanding of, and respect for, the natural, cultural, historical and built environment of the Cotswolds, and why and what makes the Cotswolds such a special place.
- For tourism to make a positive and sustainable contribution to the local economy and the environment.
- For all people to be able to easily access the Cotswolds for quality, quiet enjoyment and exploration of the area.
- For a better understanding to be gained of the Cotswolds' tourism industry in terms of visitor profiles, trends, community impacts and business performance.

- For tourism to be managed in a way that provides a quality experience for visitors, while minimising the impacts on the environment and local communities.
- For the delivery and management of tourism across the Cotswolds to be achieved through a partnership approach with all key stakeholders fully involved in the decision-making and implementation processes.

The above aims, along with the findings of the consultation workshops, surveys and research, can be incorporated into the following vision for the Cotswolds:

By 2016: the Cotswolds is widely recognised and valued as a sustainable visitor destination, where local communities benefit, businesses prosper and the environment is sustained through the co-ordinated delivery of quality and enriching visitor experiences.

Key objectives

The strategic approach and vision outlined above forms the basis for the following key objectives:

1. To strengthen the identity and raise awareness of the Cotswolds as a sustainable destination, recognising and promoting its special qualities and designation as an AONB.
2. To maintain a high-quality environment and develop initiatives whereby tourism can contribute to the conservation and enhancement of the Cotswolds' landscape and environment.
3. To encourage a wider understanding and appreciation of the Cotswolds' natural, historic and cultural heritage.
4. To work with tourism businesses to develop and promote new product ideas based around the special qualities of the Cotswolds AONB and aimed at encouraging longer stays throughout the year and quality visitor experiences.
5. To actively support and encourage tourism businesses to develop and promote environmentally sound practices to improve their competitiveness and act as ambassadors for the AONB.
6. To improve the understanding and management of visitor flows, both geographically and seasonally, to ensure that tourism maintains the quality of life of local residents in the Cotswolds and makes a positive contribution to the local economy.
7. To encourage wider access, exploration and quality provision to attract all people.

Because of the size and complexity of the Cotswolds, there needs to be a widely representative body that can co-ordinate the development, management and promotion of sustainable tourism throughout the area and implement the strategy and action plan. A permanent sustainable tourism forum is also a key requirement of the European Charter.

The Cotswolds Sustainable Tourism Partnership, which was set up at the beginning of 2010, is providing a good start. However it needs to be strengthened, formalised and developed further to widen its representation among private and public stakeholders across the area.

In terms of resources to deliver the action plan, many aspects of the plan can be implemented using existing resources. However, because of future economic and funding uncertainties, there is an ongoing need to monitor this situation closely and identify potential sources of funding for specific project areas. There is also a clear requirement for a sustainable tourism officer post to be established to work across the Cotswolds and ensure close co-ordination and liaison among stakeholders and help to promote and implement sustainable tourism activities.

INTRODUCTION

The Cotswolds Area of Outstanding Natural Beauty (AONB) is a protected area located primarily in the South West of England, bordering into the South East and West Midlands areas. The Cotswold Hills make up the most part of the AONB. They form a dramatic escarpment on their western edge with far-reaching views of the Severn Estuary, and dip gently away to the south east with rolling 'wolds' and river valleys. The area covers 2,038 sq kms, making it the largest of the family of AONBs in the UK. Its highest point of 330 metres is at Cleeve Hill on the escarpment.

The majority of the AONB lies in the county of Gloucestershire in the South West of England, with the rest of the area in Oxfordshire, Wiltshire, Warwickshire, Worcestershire, South Gloucestershire and Bath & North East Somerset. The AONB is looked after by the Cotswolds Conservation Board, an independent statutory organisation that was established in 2005 by order of the Secretary of State, with the approval of both Houses of Parliament. The Board, which superseded the former Cotswolds AONB Partnership, is made up of 37 members who are appointed by local authorities, parish councils and the Secretary of State to ensure that the full cross-section of interests across the AONB is represented. It has a team of 13 staff and is supported by over 300 active voluntary wardens who all live in the area (see Appendix A for an organisational structure of the Board).

The purpose of the Board is to conserve and enhance the Cotswolds AONB and to increase the understanding and enjoyment of its special qualities, ensuring that these complement the conservation and enhancement of the area. In fulfilling these roles the Board seeks to foster the social and economic well-being of the people living in the AONB. In this sense, the Board has a similar role to that of a National Park authority.

Tourism is of major importance to the economy of the AONB. The Cotswolds is a well-established and well-known destination, both in this country and overseas. Its unique landscape, natural beauty and cultural heritage lie at the heart of the Cotswolds' tourism industry and are the primary attractions for its many millions of visitors. The sustainable management of this landscape and its special qualities is therefore essential to the future prosperity of the tourism industry and the economy of the Cotswolds.

The Board has set itself the aim of achieving the award of the European Charter for Sustainable Tourism in Protected Areas. As part of the application process, a five-year sustainable tourism strategy and action plan has been developed in line with the requirements and principles of the Charter. The strategy has been developed in consultation with key tourism stakeholders in the Cotswolds, taking into account the overall needs and aspirations for tourism throughout the area, and is set within the wider context of developing sustainable tourism in the regions and England.

For the purpose of this strategy, the Cotswolds destination refers to the designated Area of Outstanding Natural Beauty and its immediate environs.

The Cotswolds Area of Outstanding Natural Beauty

The Cotswolds was designated an Area of Outstanding Natural Beauty by Government in 1966 in recognition of its rich, diverse and high-quality landscape. It is one of the UK's best known and most loved areas – enjoyed by millions for its peaceful countryside, Cotswold stone buildings, picturesque towns and villages, rich heritage and range of attractions and recreational activities.

Covering 2,038 sq km (790 sq miles), it is the largest member of the family of 46 AONBs in the UK, and the second largest protected landscape in England after the Lake District National Park. The area embraces a large number of communities set within a variety of distinctive landscapes, extending from South Warwickshire and Worcestershire in the north, through Gloucestershire and West Oxfordshire, and including parts of Wiltshire, South Gloucestershire and Bath & North East Somerset in the south.

The area is within easy reach of large centres of population. Two million people live within a 20-minute car journey of the Cotswolds AONB. The conurbations of London and the South East, as well as those of Birmingham and the West Midlands, are less than 90 minutes away and have rapid rail access.

What makes the Cotswolds AONB distinctive?

The Cotswolds Area of Outstanding Natural Beauty is an area of national and international importance because of its richly diverse and high-quality landscape and habitats. Nineteen different landscape types have been identified¹. There is a rich diversity of flora and fauna with many sites designated under national and European legislation including unimproved limestone grasslands and ancient beech woodland. Within the Cotswolds AONB, there are five European Special Areas of Conservation and 89 Sites of Special Scientific Interest including three National Nature Reserves.

The Cotswolds AONB Landscape Character Assessment identified the following principal elements that encompass the distinctive features of landscape, historic and biodiversity interest, as well as the built environment:

- *Ancient semi-natural woodlands and veteran trees*
- *Permanent pasture, including unimproved calcareous grassland*
- *Archaeological sites and their settings and remnant historic landscapes*
- *Vernacular stone buildings and their settings*
- *Settlement patterns and their relationship to landscape*
- *Parkland and historic designated landscapes*
- *Dry-stone walls and hedgerows*

¹ Cotswolds AONB Landscape Character Assessment 2003

Sustainable tourism – what it is and why it is important

Sustainable tourism and ‘green’ issues are now very much mainstream. There are currently over 2,000 businesses in the UK that are registered with the Green Tourism Business Scheme and there are 90 protected areas across Europe that hold the European Charter for Sustainable Tourism. Importantly, sustainability now underpins all national, regional and local tourism policy.

The United Nations World Tourism Organisation defines sustainable tourism as tourism that meets the needs of present tourists and host communities while protecting and enhancing needs for the future. It is an ethos that underpins all tourism activities and, as such, it is integral to all aspects of tourism development.

At a national level, there is an increasing focus on sustainability and climate change, with domestic tourism now taking a much higher profile than in the past. The Government’s new Framework for Sustainable Tourism in England (DCMS 2009) outlines the key challenges for action to address the sustainability challenges facing the tourism industry and stresses the importance of building a more sustainable industry that works within environmental limits. The draft guiding principles for tourism transition in the South West place significant emphasis and aspirational goals on moving tourism towards a lower carbon future.

Tourism is a vital business sector in the Cotswolds and is worth more than £425 million per year to the local economy². Yet tourism relies on the integrity of the natural environment. The beautiful landscapes and special qualities of the Cotswolds lie at the heart of its communities and form the foundation of its tourism industry. Around 23 million visitors are drawn to the Cotswolds each year to gain pleasure and enjoyment from the area; while they bring many benefits to the Cotswolds, they can also bring costs in the form of pressures both on local communities and the environment.

The future success of the tourism industry therefore must be underpinned by a sustainable approach. Conserving the Cotswolds’ special qualities and widening understanding of them, while supporting local communities and generating income for the area should be the basis on which tourism is developed.

Sustainable tourism in the Cotswolds

There is a strong history of businesses and tourism authorities working together to develop sustainable tourism initiatives in the Cotswolds. The Board has worked closely with West Oxfordshire District Council Tourism Service to develop the Cotswolds Green Tourism Project. This project was aimed at encouraging businesses to participate in the Green Tourism Business Scheme and encouraging visitors to contribute towards conservation of the AONB through a visitor payback scheme.

Additionally, for over a decade, the Board has promoted public transport options to visitors through the Explore the Cotswolds by Public Transport Guide and timetables, while local tourism authorities have driven sustainability forward through a variety of schemes including

² The Value of Tourism to the Cotswolds AONB 2001 & 2003

developing car-free itineraries, green tourism weekends and 'Be the Perfect Visitor' sustainable tourism cards. There are presently 39 businesses and organisations in the AONB and surrounding area which are members of the Green Tourism Business Scheme, with more awaiting grading. (See Appendix B for further details of sustainable tourism initiatives in the Cotswolds).

The European Charter for Sustainable Tourism in Protected Areas

The European Charter for Sustainable Tourism in Protected Areas is a practical management tool for ensuring that tourism development in Europe's protected areas is sustainable. The Charter is awarded by the Europarc Federation, an umbrella organisation of protected areas across 37 European countries.

The underlying aims of the Charter are:

- to increase awareness of, and support for, Europe's protected areas as a fundamental part of our heritage that should be preserved for, and enjoyed by, current and future generations;
- to improve the sustainable development and management of tourism in protected areas, which takes account of the needs of the environment, local residents, local businesses and visitors.

These aims are elaborated in a set of ten principles, which are to:

1. Involve all those implicated by tourism in and around the protected area in its development and management.
2. Prepare and implement a sustainable tourism strategy and action plan for the protected area.
3. Protect and enhance the area's natural and cultural heritage, for and through tourism, and protect it from excessive tourism development.
4. Provide all visitors with a high-quality experience in all aspects of their visit.
5. Communicate effectively to visitors about the special qualities of the area.
6. Encourage specific tourism products which enable discovery and understanding of the area.
7. Increase knowledge of the protected area and sustainability issues amongst all those involved in tourism.
8. Ensure that tourism supports and does not reduce the quality of life of local residents.
9. Increase benefits from tourism to the local economy.
10. Monitor and influence visitor flows to reduce negative impacts.

Developing a sustainable tourism strategy in partnership

The Cotswolds Conservation Board, and the former Cotswolds AONB Partnership, has a strong background and history of working in partnership with a broad range of stakeholders across the Cotswolds AONB. This strategy and action plan has similarly been developed following a process of local consultation with a range of organisations and individuals.

Many consultees within the administrative boundaries of the Cotswolds AONB have responsibilities which extend into other areas; in some cases, the AONB forms a small part of their geographical area of interest. It is therefore important that all opinions are considered.

A Cotswolds AONB Sustainable Tourism Partnership was set up in early 2010 involving the Board, tourism authorities from across the AONB and representatives from the private and community sectors. This group has met on a regular basis to help guide the strategy and identify priorities as well as share ideas and learn from other areas through a variety of talks and presentations. One of the aims of this strategy is to further develop and expand the Partnership as it will be the main body to implement and review the strategy.

The development and consultation of this strategy has taken place in several stages, including:

- One-to-one meetings between representatives from the Board and from tourism authorities in the AONB and surrounding area.
- Presentations about the strategy development plans and European Charter bid given to the Board's Forum for Partners and local tourism network meetings.
- A full appraisal and assessment of key policy and strategy documents including research surveys and reports.
- Two surveys undertaken among local residents and local tourism businesses.
- Three consultation workshops with key stakeholders held in different parts of the AONB to discuss aims, priorities and actions required in the development of the strategy and action plan.
- Local media and website used to promote the surveys and workshops and to encourage wide participation.
- Progress reports presented to the Board's Enjoying & Appreciating sub-committee.
- The draft strategy and action plan distributed for consultation among the Cotswolds AONB Sustainable Tourism Partnership and key partners and stakeholders via the AONB website.
- The final draft strategy and action plan presented to the Board's Executive Committee and full Board meetings.

AN ASSESSMENT OF THE COTSWOLDS AREA OF OUTSTANDING NATURAL BEAUTY

OVERVIEW OF TOURISM IN THE COTSWOLDS

The Cotswolds is one of the most popular and well-known destinations in England and the UK, evidenced not only by the millions of visitors who are attracted to the area each year, but also by the plethora of books, articles and guides written about the area. This popularity reflects, in part, the proximity of the Cotswolds to large urban populations and the value that many of those place on the countryside. More importantly, however, it reflects the Cotswolds' national and international reputation as the quintessential English landscape; one that has come to be regarded as the hallmark of modern landscape and architectural taste³. During the 20th century, it continued to gain in popularity with visitors from both the UK and, increasingly, from overseas. It has become particularly popular with the Japanese and US markets. Today it is estimated that some 23 million people visit the Cotswolds AONB each year, the majority of whom are on day visits, often as part of a wider tour⁴. Visit England's *Strategic Framework for Tourism 2010 – 2020* refers to the Cotswolds as one of England's long established and world-famous 'attract' brands, which can help to attract visitors and encourage them to travel and spend more widely in the country.

The Cotswolds AONB lies at the centre of the Cotswolds destination 'triangle' between the main popular points of Oxford, Bath and Stratford-upon-Avon. Its close proximity and ease of access to these places, makes the Cotswolds an ideal destination for day visitors and tours by coach and it is therefore frequently included in touring itineraries of this region of rural England.

There are a variety of features that attract visitors to the Cotswolds, in particular the picturesque market towns and villages, an unspoilt landscape, easy access to the countryside and a wide range of visitor attractions. The Cotswolds is also an important destination for quiet countryside recreation with many people taking part in healthy outdoor activities such as walking and cycling.

Tourism is the major source of income and employment for the area, generating around £425 million each year and employing 1 in 10 of the working population, many of whom work in the numerous accommodation establishments, visitor attractions, restaurants, cafes and shops.

A STRATEGIC AND MANAGEMENT CONTEXT

The Cotswolds AONB Sustainable Tourism Strategy reflects the current national, regional and local policies for sustainable development and tourism. A comprehensive explanation of the policy documents that have helped to inform this strategy is contained in Appendix C.

³ The Cotswold Landscape, 1990

⁴ The Value of Tourism to the Cotswolds AONB 2001 & 2003

Cotswolds AONB Management Plan 2008 – 2013

The Cotswolds Conservation Board has a statutory requirement to produce a Management Plan for the AONB under Section 89 of the Countryside and Rights of Way Act 2000 (the CROW Act). The Cotswolds AONB Management Plan 2008-2013 sets out the aims and objectives of the Cotswolds Conservation Board over the five-year period. The plan was developed in full consultation with a wide range of people and organisations involved in, or affected by, the management of the AONB including tourism authorities and local businesses. It highlights the importance of tourism to the local economy and stresses the need for an integrated approach to the management of tourism and recreation. It is also recognised through this plan that tourism has the potential to make a major contribution to the conservation and enhancement of the Cotswolds' special qualities. It provides the overall strategic context for the Cotswolds AONB sustainable tourism strategy and action plan.

The following key principles inform the Board's approach to managing the AONB:

- The implications of climate change must be addressed – seeking to mitigate the causes of and adapt to the effects of climate change in ways that conserve and enhance the Cotswolds' special qualities.
- The landscape of the AONB must be managed in ways that conserve and enhance landscape character, local distinctiveness, geology and geomorphology, historic features, habitats and biodiversity.
- A sustainable approach must be taken to all issues within the AONB, particularly in the development and management of its rural economy.
- It is important to increase people's awareness, knowledge and understanding of the qualities of the AONB, and of the opportunities to enjoy and explore the area.

The Board fully acknowledges that tourism and recreation have the potential to make a major contribution to the local economy which, if carefully managed, can contribute to the conservation and enhancement of the Cotswolds' special qualities.

The majority of sustainable tourism objectives and actions are included in the 'Enjoying and Appreciating' section of the plan. Specific objectives and policies which relate to tourism in the plan are:

Objectives:

- The Cotswolds is understood and appreciated by as wide a range of people as possible.
- The barriers that are preventing people from experiencing the Cotswolds are identified and these barriers are removed.
- An integrated approach to the management of recreation and tourism is taken, ensuring that they do not damage the character and special qualities of the Cotswolds.

- Public transport choices for recreation and tourism access are improved significantly.
- Sustainable tourism contributes to the local economy and to the conservation and enhancement of the Cotswolds' special qualities.
- There is greater public engagement in conserving the AONB through volunteering and partnerships with other organisations.

Policies:

- That visitors and the tourism industry understand the need for, and support the conservation and enhancement of, the special qualities of the AONB as the key assets upon which tourism is based.
- That the tourism industry makes a vital contribution to the Cotswold economy while at the same time seeking to manage in a positive and sustainable manner the pressures tourism places on the natural beauty of the AONB.
- That there is a co-ordinated approach to the appropriate management and promotion of public access and quiet recreational activities with planning to ensure access for all.

National policy and strategy

England: A Strategic Framework and Action Plan for Tourism 2010 – 2020 Visit England

This Strategic Framework sets out the vision of Visit England which is to maximise tourism's contribution to the economy, employment and quality of life in England. The four overall, interdependent aims are:

- to increase England's share of global visitor markets;
- to offer visitors compelling destinations of distinction;
- to champion a successful thriving tourism industry; and
- to facilitate greater engagement between the visitor and the experience.

Overall, Visit England aims to achieve a 5% annual growth in the visitor economy.

The Framework recognizes the Cotswolds as one of England's "world famous and exceptional destinations" which has the ability to "attract new visitors who can then be encouraged to explore the richness of England," thereby widening the economic benefits of tourism. The country's internationally renowned built and natural heritage is seen as a key asset in delivering authentic and world class experiences for visitors.

Sustainable Tourism in England: A framework for action. Meeting the key challenges, DCMS, March 2009

This framework sets out the environmental and social challenges that the tourist industry currently faces and ways in which they can be met. It focuses on six key challenges which are to:

- minimise environmental impact and resource use;
- address the impact of tourism transport;
- improve quality and make holidays accessible to all;
- improve the quality of tourism jobs;
- maintain and enhance community prosperity and quality of life; and
- reduce the seasonality of demand.

The framework expands on each of these challenges, proposes flexible responses and ideal potential outcomes.

Natural England's position on inspiring people to value and conserve the natural environment sets out the principle that there should be the widest range of opportunities for people of all ages, abilities, ethnic groups and social circumstances actively to engage in, value, enjoy and be inspired by the natural environment, and this should aid healthy activity and be integral to people's everyday lives.

Regional policy and strategy

The strategy **Towards 2015: Shaping Tomorrow's Tourism** developed by South West Tourism and the South West Regional Development Agency, and currently under review, defines their overall vision as: *"by 2015, the South West of England will be internationally recognised as a model tourism destination. This will be achieved by creating a unique balance between its environment, communities, industry and visitor satisfaction, while earning long-term economic, environmental and social benefit for the whole region."*

The strategy identifies 3 strategic aims which are:

- Driving up quality
- Delivering truly sustainable tourism
- Establishing better and more efficient arrangements for delivering tourism at the destination level.

With the demise of the regional tourist boards in 2011, the emerging draft guiding principles for tourism transition in South West England sets out guidance for the delivery

of sustainable tourism development in this region in the future. This adopts the four priority areas identified by Visit England in the Strategic Framework for Tourism which are:

- Marketing for sustainable growth;
- Offering compelling destinations of distinction;
- Championing a successful thriving tourism industry; and
- Improving the quality of the visitor experience.

Conclusions on strategic policy context

There are many regional policies and strategies that relate to the Cotswolds and the development of tourism, from which the following conclusions can be drawn:

- The conservation of a high-quality environment is a key priority linked with the development of the visitor economy.
- Sustainability underpins all tourism development.
- Visitors should have high-quality, enjoyable and fulfilling experiences.
- Tourism is a key economic driver and should meet its potential to bring prosperity to the area.
- Distinctiveness is an important feature in destination development.
- The Cotswolds is recognised as a strong, international brand.
- Tourism development should be socially inclusive.
- The natural, historic and cultural heritage are key strengths.
- Tourism should enhance the quality of life for local people.
- There is a widespread drive to increase staying (ie overnight) visitors and encourage longer stays and higher visitor spend, thereby maximising the economic benefits of tourism.

THE REGIONAL PICTURE

As is often the case with protected areas, the Cotswolds AONB's geographical boundary crosses a number of administrative boundaries. One of the issues that arose at the consultation workshops was that, although the Cotswolds is a widely recognised name, there was a lack of clear understanding and identity for the Cotswolds AONB itself, with some confusion over the exact area that the Cotswolds covers. This is further evidenced by the often creative definition of

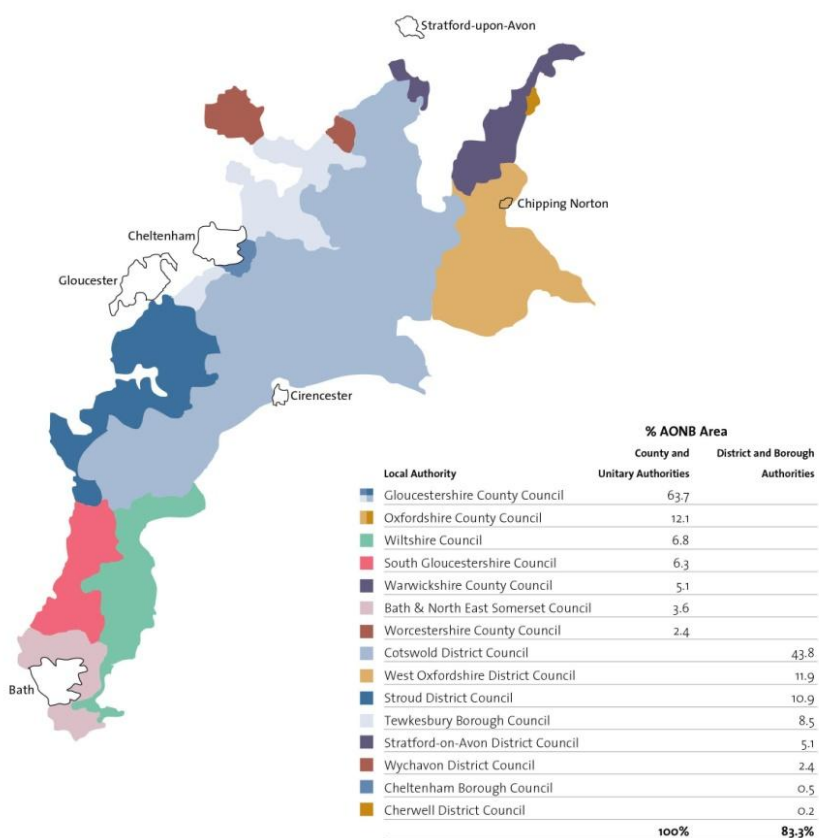
'Cotswolds', particularly by guide books and publicity materials which sometimes artificially extends the region thus adding to the confusion.

Administratively, the Cotswolds AONB is quite complex as it falls within the remit of:

- 4 county councils: Worcestershire, Gloucestershire, Warwickshire and Oxfordshire;
- 3 unitary authorities: Bath & North East Somerset, South Gloucestershire and Wiltshire;
- 8 district councils: Cotswold, Stroud, Tewkesbury, Cheltenham, Wychavon, Stratford, Cherwell and West Oxfordshire; and
- 3 regions: the South West, South East and West Midlands.

These are shown on the map below.

Local Authority Boundaries



TOURISM ADMINISTRATION

Because of the location of the AONB across different local authority boundaries, the administration of tourism across the AONB is a similarly complex picture. The largest part of the AONB sits in the South West of England which is supported by South West Tourism and 64% is

in the county of Gloucestershire which is supported by Cotswolds and Forest of Dean Tourism. West Oxfordshire District Council is responsible for tourism development in this eastern part of the AONB representing 12% of the total area. There are a number of other tourism authorities that overlap with the AONB as outlined in the following table.

Tourism authority	County	Region	Percentage of AONB
Cotswolds & Forest of Dean Tourism	Gloucestershire	South West	64%
West Oxfordshire District Council	Oxfordshire	South East	12%
Visit Wiltshire	Wiltshire	South West	7%
Destination Bristol	South Gloucestershire	South West	6%
Warwickshire County Council	Warwickshire	West Midlands	5%
Bath Tourism Plus	Bath & NE Somerset	South West	4%
Destination Worcestershire	Worcestershire	West Midlands	2%

While the Cotswolds Conservation Board does not have specific responsibility for tourism marketing or development in the Cotswolds, it aims to work with the above organisations to influence and encourage the development of tourism in a sustainable way.

The Cotswolds AONB Sustainable Tourism Partnership was set up in early 2010 to develop and deliver the sustainable tourism strategy and action plan for the AONB, in accordance with requirements of the European Charter.

It should be noted that, during the preparation of the sustainable tourism strategy for the Cotswolds AONB, the regional structures for the delivery of tourism have been changing with the result that regional development agencies, which fund regional tourist boards, are being abolished and Local Enterprise Partnerships (LEPs) are being created in their place. At the time of writing it is too early to know the extent to which tourism authorities and LEPs will co-exist. Nevertheless the new, more localised arrangements are likely to bring new opportunities for cross-border partnership working between the public and private sectors.

ECONOMIC AND SOCIAL ISSUES IN THE COTSWOLDS

The Cotswolds is generally perceived to be quite an affluent area with high home and car ownership, and relatively low unemployment. The natural beauty makes the area an attractive place in which to live and work, and underpins decisions to retire to the area.

The residential population within the AONB is around 158,000 (*2001 Census*) and a further two million people live 'on the doorstep' within a 20-minute drive. The Cotswolds is within easy access of the cities of London, Bristol, Bath, Swindon, Gloucester and Birmingham.

Rapid change in the rural economy of the Cotswolds and its communities are major challenges to the social and economic life of the area. The population has continued to increase sharply,

with the majority of this increase being the result of in-migration, particularly of retired people⁵. The Cotswolds has also been an increasingly popular choice for a number of ‘celebrities’ choosing to move to the area and is home to members of the Royal family including HRH Prince of Wales. As well as helping to raise the profile of the Cotswolds, this has also influenced house prices in many areas.

Because of its proximity to major cities, motorways and improvements to the road network, there has also been an increase in the number of people living in the Cotswolds who commute on a daily basis outside the area, as well as those who work away during the week and return home at weekends. There is a continuing increase in second home ownership, a number of which are used as holiday cottages, and this has contributed to rising house prices. The increase in second homes and the rise in house prices were issues highlighted in the survey of local residents (see Appendix D).

In general, there is a positive response to tourism among local communities. The survey of local residents showed that many considered tourism to be an important economic driver for the area and a vital source of income which helps to support rural services. Nevertheless, there were also some issues raised including visitor pressures in certain areas such as traffic congestion and lack of parking, which need careful visitor management.

The main economic activities that the landscape of the Cotswolds depends upon are farming, tourism and quarrying. However, just 5% of people living in the AONB work in agriculture and quarrying, while around 10% of the working population are employed in tourism. Tourism is generally a relatively low-paid industry which, combined with a lack of affordable housing in the Cotswolds, means that people working within the industry cannot always afford to live in the area in which they work.

The number of people employed in farming has decreased significantly over the last two decades⁶. Many farmers are becoming increasingly dependent upon diversification options to sustain their business, particularly since the outbreak of Foot and Mouth Disease in 2001; tourism has been one way in which some farmers have been able to supplement their incomes.

There is a strong sense of identity and pride in local communities throughout the Cotswolds, and commitment by people to conservation is strong. This is reinforced by the above average retired population and is evidenced by the 300+ active Cotswold Voluntary Wardens who undertake many thousands of hours of valuable practical conservation work throughout the AONB, as well as lead hundreds of guided walks throughout the year, on behalf of the Board.

THE NATURAL ENVIRONMENT

LANDSCAPE & GEOLOGY

The landscape of the Cotswolds has long been perceived as a rural idyll. Many of the features associated with the landscape evoke strong images particularly the dramatic escarpment,

⁵ Cotswolds AONB Management Plan 2004

⁶ The Future of Farming and Forestry in the Cotswolds AONB 2009

expansive hills, secluded valleys, extensive network of dry-stone walls and picture-postcard villages of Cotswold stone. The countryside, scenery, peacefulness and its 'quintessential Englishness' are often considered to be the main reasons why people visit the Cotswolds.

The Cotswold Hills are the central feature of the AONB and represent the best known section of an outcrop of Jurassic oolitic limestone that stretches right across England. The most dramatic scenery occurs on the north-west face of the Cotswolds, which forms a prominent escarpment overlooking the Severn, Avon and Berkeley Vales, with fine views to the Forest of Dean, Malvern Hills and beyond into Wales and the Shropshire Hills. Historic, picturesque villages can be found close to the escarpment, beechwoods line its face and there are spectacular road descents. In places the escarpment is deeply incised forming densely wooded valleys and provides a magnificent setting for many towns and cities such as Bath, Cheltenham and Stroud. To the south-east, the land gently dips away with rolling hills and river valleys. Broad open views of arable fields with woodland alternate with scenes of village, pasture and water meadow.

A landscape assessment of the AONB was carried out in 2004 which identified 19 'landscape character types' across the Cotswolds⁷. This assessment provides a full picture of the characteristic elements, the forces that have created and continue to affect the landscape. The full copy of the landscape character assessment can be accessed via the Cotswolds AONB website.

The geology of the Cotswolds has had a very strong influence on the landscape and it has also played a significant role in its industry and heritage. Cotswold stone has been used for over 6,000 years as a building material and gives the Cotswolds its distinctive character and unity. Stone walls, features and buildings blend towns, villages and farms with their surrounding landscape, displaying a remarkable visual unity not found in many places elsewhere.

The AONB contains 36 Geological Conservation Review sites, which are also designated Geological Sites of Special Scientific Interest, and over 100 Regionally Important Geological Sites. A swathe of land 60 miles long has been proposed as the Cotswold Hills Geopark in recognition of the geological importance of the area. A number of old quarries have good access and are fascinating places to explore the geology of the area and search for a variety of fossils.

The vast majority of the Cotswolds (86%) is farmland, with around 3,500 farm holdings of both mixed and arable farms, divided by a network of dry-stone walls, hedges and watercourses. Much of the Cotswolds owes its beauty to centuries of agriculture and expert land management by farmers. Recent studies estimate that around 65% of the total agricultural area is under some form of agri-environmental scheme⁸.

Around 10% of the AONB is covered by woodland, comprising mainly broadleaf such as beech and ash. Ancient woodland, especially beech, is a particularly distinct and prominent feature of

⁷ Cotswolds AONB Landscape Character Assessment

⁸ The Future of Farming and Forestry in the Cotswolds AONB 2009

the escarpment and incised valleys. Part of this woodland is included within the Cotswold Beechwoods Special Area of Conservation and the Cotswolds Ancient Woodland Project.

Another notable feature of the Cotswolds is its historic parks, gardens and landscaped areas. A number are very extensive, notably Badminton Park, Westonbirt Arboretum, Cornbury Park, Dyrham Park and Cirencester Park. These are also venues for a range of popular events which attract many visitors to the area.

In the Cotswolds, traditional skills such as dry-stone walling, hedgelaying and woodland coppicing have played an important role in shaping the distinctive and unique landscape. The Cotswolds Conservation Board runs an annual programme of training courses aimed at teaching people the methods and techniques involved in these traditional Cotswold skills. This helps maintain these skills for the landscape and for future generations. The courses are very popular and often attract people from out of the area who combine a course with staying in local accommodation. There is potential to develop the courses further to enhance the range of skills and subjects taught and to package them with accommodation and, possibly, other visitor related activities to create a distinctive Cotswolds tourism product.

BIODIVERSITY

The underlying limestone geology and a long history of changing agricultural land-use have created a range of man-made habitats, including semi-natural, supporting an exceptional diversity of plant and animal life.

Beech woodlands along the escarpment and valleys are a striking feature and provide a home for a variety of woodland flowers and shrubs. The AONB has half of the UK's unimproved limestone grasslands, including registered commons, which are internationally important for their flowering plants and are vital reserves for birds, butterflies and important invertebrates, many of which are considered nationally rare.

The wider countryside, containing streams and rivers, ancient parkland and hedgerows, is also inhabited by a wealth of wildlife. The AONB supports nationally important populations of 20 bird species while disused quarries and mines provide valuable habitats for rare bats and other species.

There are five European Special Areas of Conservation (SACs) within the AONB. These are the Cotswold Beechwoods, Rodborough Common, Bath and Bradford-on-Avon, Dixton Wood and Bredon Hill.

There are two categories of national statutory site protection which help to conserve the best wildlife habitats and geological exposures. These are:

- Three National Nature Reserves (NNRs):
 - Cotswold Commons and Beechwoods
 - Bredon Hill
 - Wychwood Forest

- Sites of Special Scientific Interest: 89 in the AONB including the three NNRs above.

In addition, a large number of wildlife sites are identified by county wildlife trusts or local authorities as having local significance for biodiversity. Many sites are also protected due to being owned by organisations such as the National Trust and Woodland Trust.

Access to areas that are rich in biodiversity adds to the quality of experience for visitors to the countryside. Visitor pressure at some locations that are important for recreation however, such as commons, can lead to localised pressure, with physical changes in habitat due to wear and tear and disturbance to sensitive species such as the dormouse and grassland flora. The monitoring of key species and habitats where there is visitor access, particularly in areas of sensitivity is an important consideration in the management of tourism.

The Board works with many partners including Natural England, RSPB, Wildlife Trusts, National Trust, Woodland Trust and the Forestry Commission to conserve and enhance its natural environment. The Cotswold Farmland Bird project which aims to reverse the decline in the number of farmland birds in the AONB, such as the corn bunting and lapwing, has been very successful with much anecdotal evidence of increasing numbers of nesting pairs of farmland birds. The project, run in partnership by Natural England, the RSPB and the Board, is considered to be an example of best practice.

There are many nature reserves throughout the Cotswolds, managed by local Wildlife Trusts, that are freely accessible to the general public. With the help of information boards and footpaths, these nature reserves offer carefully managed ways for visitors to find out more about the rich flora and fauna of the sites. In addition, the Cotswolds has a considerable amount of access land and many popular guided walks and nature events take place throughout the year. They are designed to raise awareness of nature and wildlife in the Cotswolds.

Consumer research carried out as part of the South East Protected Landscapes (SEPL) project, 'Sustainable Tourism in our Finest Landscapes' (see Appendix E) indicated strong support for wildlife and nature-themed holidays.

HISTORIC, CULTURAL AND BUILT HERITAGE

The Cotswolds has a rich heritage and an enormous wealth of historic resources from Neolithic long barrows, Bronze Age standing stones; Iron Age hill forts, Roman roads and villas, through to great churches, abbeys, manor houses and gardens built during medieval times. Many of these are popular visitor attractions and open to the public throughout the year.

Many archaeological sites are of national importance and over 400 are listed as Scheduled Ancient Monuments. The AONB also provides the setting for two World Heritage Sites: the City of Bath in the south-west and Blenheim Palace to the east.

There are numerous historic and unspoilt villages and market towns throughout the AONB, built out of the famous local stone, which are considered key assets of the AONB and are often the primary attraction for visitors to the area. Some of the more popular towns and villages include

Bourton on the Water, Moreton in Marsh, Chipping Campden, Broadway, Castle Combe, Burford, Bibury, Winchcombe, the Slaughters and Stow on the Wold. These are centres of tourism activity and contain many attractions and historical buildings set within picture-postcard scenes.

For the most part, the Cotswolds was isolated from the effects of the Industrial Revolution, and the relative absence of industrialisation led to the survival into the late nineteenth century of an unusually high proportion of unaltered seventeenth and early eighteenth century buildings, including many of the fine manor houses and churches that were built by wealthy wool merchants during the Middle Ages. As a result, the Cotswolds has come to be recognised as the 'quintessential pre-industrial English landscape.'

The hills and valleys of the central Cotswolds were more affected by the Industrial Revolution as this area became a centre for the woollen cloth industry, with over 150 mills in operation between the Middle Ages and the nineteenth century. The Cotswold Canals – a central feature of the industrial heritage of this area – are currently undergoing a major restoration project offering many potential tourism opportunities in the future, based around the picturesque Stroud Valley.

Culture features strongly in the past and present day Cotswolds. A few miles north of the AONB is Stratford-upon-Avon, the birthplace of William Shakespeare - arguably the world's greatest dramatist. But it is the well-known designer William Morris, who came to live at Kelmscot Manor near the Cotswolds in 1871, who is considered to have 'discovered' the Cotswolds. Inspired by the landscape and vernacular architecture of the area, he promoted the buildings of the Cotswolds through his writing and founded the Society for the Protection of Ancient Buildings. His work laid the foundations for the world-famous Arts and Crafts movement. Many of Morris's followers, equally inspired, moved to the Cotswolds including the Guild of Handicrafts which moved from London and set up in Chipping Campden in 1902. This continues to be an important centre for arts and crafts to the present day.

During the 20th century, the area's popularity with painters, musicians, writers and poets flourished. Famous names such as the painters, John Singer Sargent and Paul Fripp, composer Ralph Vaughan Williams, and writer Laurie Lee (who set '*Cider with Rosie*' in the Cotswolds), have all helped to bring the Cotswolds to the attention of a wide audience as has the fact that it is home to two Royal households. Today, the Cotswolds still attracts and inspires large numbers of artists. Many high-profile writers, actors, designers and musicians call this area their home, including artist Damien Hurst, author Jilly Cooper and actress Kate Winslet. The old English tradition of Morris Dancing is particularly associated with the Cotswolds. The Cotswold Morris is one of the predominant styles of this folk dance and it is still performed at many village fetes and events throughout the Cotswolds.

The present-day Cotswolds offer a vast range of cultural events, galleries, arts and crafts, museums and festivals. The Cotswolds recently staked its claim as being a centre for culture through a new marketing campaign by Cotswolds & Forest of Dean Tourism, entitled 'Britain's Rural Capital of Culture'.

ENVIRONMENTAL PRESSURES

The Cotswolds AONB Landscape Character Assessment highlights the considerable pressures on the Cotswolds that have resulted from greater affluence and leisure time, particularly in the last two decades. The AONB attracts many visitors throughout the year and, during peak periods the most popular places suffer from the adverse effect of visitor pressure, congested roads and inappropriate parking. Tourism and increased traffic have brought with them upgraded roads, bypasses and through-routes along with an increased number of road signs including the tourism 'brown' signs. These factors increasingly detract from the 'rural tranquillity' that visitors seek and consequently have a negative impact on the quality of the visitor experience. Erosion of footpaths, bridleways and viewing points are also associated with the pressures of visitors at 'honeypot' areas.

This was further evidenced by the findings from the survey among local residents. Increased traffic, noise, litter and parking problems in some of the more popular areas were the key issues identified in this survey. The consultation workshops also highlighted the need to work with local communities to improve visitor management in popular areas. The impacts of tourism on local communities needs to be monitored to ensure that they are not being adversely affected by visitor numbers and associated traffic.

The majority of the visitor 'honeypot' towns, villages and sites are primarily located in the north Cotswolds area, whilst the south Cotswolds, with the exception of Castle Combe, receives relatively fewer numbers yet still offers many attractions to visitors such as canals, sites of industrial heritage and numerous attractive towns and villages. Consideration should be given in the future to encouraging a wider spread of visitors throughout the Cotswolds and working with and supporting those local communities who wish to attract more visitors to their area.

Some of the popular natural attractions in the area can experience adverse effects from visitor impacts. For example, Crickley Hill Country Park, which is a Site of Special Scientific Interest and Ancient Scheduled Monument managed by the local authority, attracts some 300,000 visitors a year. Erosion of grasslands and archaeological remains, as well as some disturbances to wildlife habitats are a direct result of the large numbers of visitors who walk there throughout the year. However, a significant amount of important practical conservation work is undertaken regularly by the local authority which helps to conserve and enhance the important features of the site. This conservation work helps to alleviate many of the negative impacts of tourism.

Overall, despite the relatively high numbers of visitors to the AONB, there are generally considered to be few adverse impacts on the natural environment. Nevertheless, this is an important area which needs to be monitored in terms of future environmental impacts of visitors in sensitive locations including the area's SSSIs.

THE VISITOR ECONOMY

The most recent economic impact study of tourism in the AONB was undertaken in 2003⁹,

⁹ The Value of Tourism to the Cotswolds AONB 2001 & 2003

providing an update on the 2001 figures. This was carried out using the Cambridge Model which is a widely used statistical model for evaluating tourism in the UK. However, there is a need to conduct a more up-to-date study of tourism performance in the Cotswolds to obtain a clearer picture of the current tourism industry, particularly as these figures are likely to be skewed as a result of the outbreak of Foot and Mouth Disease in 2001 which impacted heavily on tourism in the countryside.

The following table shows the volume and value of tourism in the AONB and illustrates the size of the tourism industry and its importance to the local economy in terms of visitor expenditure. It also clearly shows that there is a high dependency on day visitors to the Cotswolds.

Volume	2001	2003
Total number of day trips	22,500,000	22,813,000
Total domestic staying trips	664,200	766,000
Total overseas staying trips	116,900	120,400
Total staying trips	781,100	886,400
Total domestic staying nights	1,934,000	2,252,000
Total overseas staying nights	795,000	776,000
Total staying nights	2,729,000	3,028,000

Value		
Total day trip spend	£224,685,028	£226,997,390
Total domestic staying spend	£106,020,000	£143,549,000
Total overseas staying spend	£35,536,000	£41,600,000
Total staying spend	£141,556,000	£185,149,000
Other tourism related spend	£12,403,000	£13,009,000
Total visitor related spend	£378,644,028	£425,155,390
Average spend per staying trip	£181	£209
Average spend per night	£52	£61
Average spend per day visit	£10	£10

Estimated number of jobs supported by tourism spend		
Staying visitors	4,122	5,370
Day visitors	6,247	6,138
Total	10,369	11,508

The above table shows increases for the Cotswolds AONB across all aspects of both domestic

and overseas visits in 2003 compared to 2001 (with the exception of a small decrease in the number of overseas visitor nights).

Domestic tourism showed the largest levels of growth with increases of 15% in UK staying trips, 16% in nights and 35% in UK visitor spend during 2003. Overseas trips to the AONB saw a 3% increase in 2003 and overseas spend increased by 17%.

More up-to-date tourism volume and value data is available for each of the local tourism authority areas, based on the county and district boundary areas. The following table shows the volume and value of tourism to the regional economies that overlap with the AONB. These figures have been obtained by different methods, at different times and by different organisations. Although direct comparisons should not be made, they do provide a useful regional overview.

County/District	Year	Total number of trips (day and staying)	Total visitor spend	Total tourism related employment
Gloucestershire	2008	13,119,000	£829,256,000	22,546
Worcestershire	2004	10,000,000	£370,000,000	11,276
West Oxfordshire	2008	3,790,000	£206,734,000	4,088
Bath & NE Somerset	2007	4,425,000	£349,000,000	7,834
Wiltshire	2008	12,528,000	£779,335,000	19,595
Warwickshire	2006	12,928,000	£912,658,000	22,305

Visitor data for the Cotswolds can also be compared with other protected areas. The recently designated South Downs National Park is smaller than the Cotswolds, lying in close proximity to large urban areas, including London. Like the Cotswolds, it receives a large number of visitors a year – 39 million - the vast majority of whom are low spending day visitors; only 4% are staying visitors.

The Lake District National Park is the largest protected area in England. In 2004 it received nearly 16 million tourist days, and visitor revenue is worth over £600 million a year to the local economy.

These figures suggest that, like the Lake District which also has a high profile as a visitor destination, there are opportunities to increase the number of staying visitors to the Cotswolds by building on the profile of the Cotswolds as a well-known and highly regarded destination.

Visits to attractions

In the absence of up-to-date data regarding visitor numbers to the AONB, to help gauge overall visitor trends during the last five years, visitor numbers to some of the attractions in the Cotswolds and surrounding area were compiled, as shown in the table below.

ATTRACTION	2005	2006	2007	2008	2009
Roman Baths	824197	843701	831721	834742	882144
Cotswold Wildlife Park	324361	318184	321375	308149	328457
Westonbirt Arboretum	285692	300737	313183	291322	350000
Hidcote Manor Garden	125200	113200	151222	126011	159381
Dyrham Park	115576	107303	119070	122000	137553
Batsford Arboretum	64740	59269	64783	56649	58438
Chedworth Roman Villa	55152	56930	46202	51318	58116
Corinium Museum	52424	46190	42598	43102	43821
Painswick Rococo Garden	31437	28843	28208	31621	30437
Cotswold Falconry	25352	22934	21950	21285	23877
Newark Park	13708	12000	12592	15619	17500
Hailes Abbey	14018	12870	12832	13235	14642
Winchcombe Folk & Police Museum	2172	2193	2075	2001	2053

The table shows that there was an overall dip in numbers in 2006, but since then there has been an overall gradual rise in numbers, particularly in 2009. It should be noted that in the summer of 2007 the Cotswolds experienced severe flooding which may have impacted on visitor numbers. Also, 2009 was considered to be the year of the ‘staycation’ with many people choosing to take a holiday at home, rather than go abroad, resulting in an uplift of 18% in the number of holiday trips taken in England during that year¹⁰. A recent report¹¹ has showed that UK heritage attractions have helped to increase domestic visitor numbers with visits to English Heritage properties across the country up by 17% during summer 2009, and annual visitor numbers at National Trust sites up by almost a fifth.

VISITOR PROFILE

There hasn't been a survey of visitors or visitor satisfaction conducted specifically for the AONB in many years. Therefore an overall picture of visitors to the surrounding areas has been built up using the following sources of information:

- South East Protected Landscapes (SEPL) visitor research review
- South West Visitors Surveys 2008 & 2009
- Bath Visitor Survey 2008
- Coventry & Warwickshire Visitor Survey 2006
- Worcestershire Visitor Survey 2005

¹⁰ Understanding the “Staycation”, 2010

¹¹ Investing in success. Heritage and the UK tourism economy, 2010

- West Oxfordshire District Council Tourism Strategy 2009-12
- Monitor of Engagement with the Natural Environment: The national survey on people and the natural environment

SEPL visitor research review

As part of the Sustainable Tourism in our Finest Landscapes project, a comprehensive review of all relevant visitor research was undertaken by Tourism South East in 2010 to provide descriptive, attitudinal and behavioural information about visitors to the region's protected landscapes.

The review reveals a number of 'core' features among the profile of people who visit the region's countryside. Those who visit the countryside are more likely to be day visitors, older adults, in employment, car owners, and from higher occupational grades (ABC1's). Most people also visit in the company of others, typically involving two people and will have visited the area on several previous occasions.

Other key trip features include:

Overnight market is small

The vast majority of visitors are local residents and day visitors from home. The overnight market is relatively small representing around 2% to 4% of the overall tourism market and the vast majority of holiday-makers and those visiting friends and family are domestic visitors. Nevertheless there is scope to grow this market further in the future.

Walking is the most popular activity

Walking is the most dominant activity and often cited as the main reason for the visit with significant importance placed on the flora and fauna of the place and its tranquillity.

The use of formal pre-trip information is low

Most visitors are on repeat visits and therefore will not generally source information prior to visiting. The most common type of pre-trip information materials used are maps.

The car is the main mode of transport

Despite growing concern about ecological issues and a greater appreciation of the country's natural assets, most people still travel around the countryside by car. Whilst there is some evidence that more people would choose public transport options, most believe that these are inadequate.

Regional visitor surveys

Although direct comparisons can't be made between surveys as they are based on different destinations and often using different methodologies, a general assessment can be made. An analysis of these surveys shows that the majority of visitors to this region display the following key characteristics:

- Most are on a day visit to the region
- Many had visited the region before, which suggests the tourism product meets the expectations of visitors, but still holds appeal for new visitors
- Most were on holiday with a partner or spouse and no children
- Predominantly aged over 45
- ABC1 socio-demographic grouping
- Mainly on a short break or additional holiday to main holiday
- The majority travel to the area by private car
- The most popular activities on holiday are visiting attractions, general sightseeing and walking
- The favourite feature of the destination is countryside/landscape/scenery
- There is a very high satisfaction with visits
- The most popular type of accommodation for staying visitors is serviced (hotels, B&Bs, guest houses), but a large number of domestic and overseas visitors stay with friends and family.
- Many visit the region as part of a wider tour

The Cotswolds is a popular destination for coach tours and visits, with many tour operators featuring the Cotswolds as a day visit or part of a longer tour itinerary. Coaches, particularly the larger ones, can sometimes lead to congestion and parking problems in some towns and villages within the Cotswolds which have a lack of specific coach parking areas.

The Monitor of Engagement with the Natural Environment survey, undertaken on behalf of Natural England, Defra and the Forestry Commission, sought to understand how people use, enjoy and are motivated to protect the natural environment. The type of visitor who regularly visits the natural environment, displays many of the characteristics described above, ie they are predominantly aged 45-64, people in employment and in the ABC1 socio-economic groups. Levels of participation are much lower among the oldest age groups, within the black and minority ethnic population and among members of the DE socio-economic groups. Just under half of all visits involved walking with a dog. The other visits mainly involved walking (without a dog), playing with children, eating out or visiting attractions. Wildlife watching was also included as a popular countryside activity.

TOURISM FACILITIES AND SERVICES

Accommodation

There is no single comprehensive database for accommodation that covers the whole of the

AONB. However an estimate of accommodation provision during 2010 provided the following breakdown:

Accommodation type	Number
Hotels	94
Guest accommodation (B&B, guest house, farmhouse)	293
Self catering	503
Caravan and camping sites	14
Youth hostels and bunk houses	4

Source: Cotswolds & Forest of Dean Tourism

Existing accommodation guides and websites for the Cotswolds show a very wide range of quality-assessed serviced and non-serviced accommodation. The accommodation is well spread throughout the area but with concentrations in the more popular areas of Bourton, Stow, Moreton, Chipping Campden, Bibury, Broadway, Burford and Winchcombe. There are also concentrations of serviced accommodation in the border towns and cities of the AONB in Cheltenham, Gloucester, Cirencester, Stroud and Bath. Overall, the quality of accommodation is high, with a predominance of three- and four-star rated properties, many of which have gold and silver awards. Twenty-nine of the accommodation providers within the AONB and the immediately surrounding area are accredited with the Green Tourism Business Scheme.

Cotswolds Finest Hotels is a partnership of 22 independently owned or managed inns, town houses and manor house hotels in the Cotswolds which are marketed as luxury establishments. Some of these are quite well-known and recognised such as the Three Ways House which is home to the famous 'Pudding Club'. Another accommodation organisation, Cotswolds Inns & Hotels, owns seven country manor house style hotels in some the most popular towns in the Cotswolds which are promoted as quintessentially English country hotels.

As would be expected with a predominance of farmland in the Cotswolds, there is a range of farmhouse-based accommodation, much of which is on working farms and part of the Farm Stay UK and the Cotswolds Farmstay groups.

There is a large quantity of self-catering accommodation, much of it are managed and promoted through agencies such as Manor Cottages, Sykes Cottages, Cottage in the Country and Jigsaw Holidays.

The research and consultation undertaken revealed a lack of lower end, more basic accommodation, particularly camping and caravanning facilities and bunk-style accommodation. There is only one youth hostel in the AONB which is at Stow-on-the-Wold.

The Cotswolds AONB Value of Tourism report showed that in 2003, the most popular form of accommodation for both domestic and overseas visitors was serviced accommodation. The second most popular accommodation was staying with friends and relatives, followed by self-catering.

Visitor Attractions

There is a wide range of attractions across the Cotswolds: Cotswolds & Forest of Dean Tourism

list over 150 visitor attractions, of which around half are within the AONB. There are six attractions in and around the AONB which are accredited with the Green Tourism Business Scheme.

In terms of type of attractions, they tend to be themed around gardens, history and heritage attractions including a range of museums, historic sites, castles and manor houses, plus family-oriented attractions such as Cotswold Farm Park, Cotswold Wildlife Park, Cotswold Model Village and Birdland. There are also a number of art galleries and craft centres in the AONB, many of which are centred around the boundary towns of Cheltenham and Stroud. Many of the historic buildings that are popular visitor attractions in the Cotswolds are churches. In Simon Jenkins' book 'England's Thousand Best Churches', 32 churches in the Cotswolds AONB are listed, some of the finest being Northleach, Chipping Campden and Burford.

The largest paying attractions in the AONB are the Forestry Commission's National Arboretum at Westonbirt, which attracts around 350,000 visitors per year; Hidcote Manor Garden (National Trust) which has over 150,000 visitors; and Dyrham Park (National Trust) which has over 130,000 visitors. There are larger attractions located just outside the AONB including the Roman Baths & Pump Room in Bath which attracts over one million visitors a year, Cotswold Wildlife Park, which attracts over 320,000 visitors per year, and Blenheim Palace in Oxfordshire which has over 500,000 visitors¹².

The National Trust owns and manages several other sites and properties in the Cotswolds AONB: Snowhill Manor and Garden, Chedworth Roman Villa, Lodge Park and Sherborne Estate, Newark Park, Chastleton House, Upton House and Woodchester Park, along with Rodborough and Minchinhampton Commons. Some of these properties have limited opening times.

Generally, the quality of attractions appears to be good and 12 are accredited with the Visit Britain Quality Assessment Scheme for Attractions. No issues over quality arose from the consultation.

The Cotswolds Attractions Group is an association of 25 visitor attractions in the Cotswolds, which work together to promote tourism. The main aim of the group is to improve the visitor experience at attractions and to share information between members.

The AONB Management Plan highlights viewpoints as one of the many special characteristics of the AONB that attracts visitors to the area. The Cotswolds' escarpment offers some of AONB's best viewpoints. Among the more popular ones are Crickley Hill Country Park, Leckhampton Hill, Coaley Peak Picnic Site, Barrow Wake Viewpoint, Tog Hill, Broadway Tower Country Park and Painswick Beacon. Many of these sites have protected status, eg Crickley Hill Country Park, managed by Gloucestershire County Council, is a designated Site of Special Scientific Interest and part of the site is a Scheduled Ancient Monument. Visitor numbers at many of these sites can be very high, particularly during peak holiday periods which can lead to environmental pressures as mentioned on page 22.

¹² Source: Association of Leading Visitor Attractions 2009

Outdoor recreational activities

The use of the countryside for leisure and recreation is very important in the Cotswolds. The area is an accessible and well-used destination for walking, cycling and horse riding. Other outdoor activities include nature watching, picnicking, llama trekking, gliding, fishing, golf, hot air ballooning, and kite flying.

The research survey showed that 83% of local residents believed that opportunities for walking and cycling are one of the features of the Cotswolds that attracts visitors, while 65% believe that the Cotswold Way National Trail helps to attract visitors to the area.

Walking

The AONB has over 3,000 miles of public rights of way and recreational routes. Access to the peaceful countryside of the Cotswolds is important for the health and well-being of local people and the quality experience of visitors.

A well-maintained rights of way network is vital to the sustainable movement of people to and around the Cotswolds. The Board's voluntary wardens work closely with local authorities' public rights of way teams to help improve and enhance the many footpaths, bridleways and rights of way. They do this by upgrading the surfaces, installing steps, hand rails, gates instead of stiles, etc to improve access and make it easier to walk the footpaths.

The Cotswolds also contains a number of national and regional routes. The Cotswold Way is the country's newest National Trail and stretches 102 miles between Bath in the south and Chipping Campden in the north. It is a very popular walking route which attracts around 150,000 visitors every year. Recent developments include the creation of a new set of marked circular routes along the Trail designed to encourage access by a greater range of people; and an online Hall of Fame to recognise the achievements of those who have walked the Trail's full length. These have proved very popular and there are plans to extend the range of circular routes available.

The Thames Path National Trail starts in the AONB near Cirencester. An extensive network of public rights of way and long distance, promoted routes such as the Macmillan Way, Diamond Way, Windrush Way and Gloucestershire Way, criss-cross throughout the Cotswolds. Work is currently underway by the Board to map all promoted routes as part of a recreational route strategy.

In addition to the long distance linear routes, there is a great deal of information available on shorter, circular routes in the Cotswolds, much of which is produced by the Board and is available to download from the AONB website:

- 'Walks on Wheels' is a series of 15 easy, flat level walks that were specifically designed by the voluntary wardens for people with walking difficulties, including those in wheelchairs, on power scooters or with children's buggies.

- ‘Step into the Cotswolds’ is a series of 6 stile-free, short walks around West Oxfordshire which were designed by the voluntary wardens as part of the Cotswolds Green Tourism Project.
- ‘North Cotswold Walks’ is a series of 10 walks to help people explore the area around some of the popular towns of the north Cotswolds and is based around public transport to encourage people not to use cars.

For further details on walking in the Cotswolds, see Appendix F.

Many of the Cotswolds’ historic towns and villages have leaflets describing circular walking routes and heritage trails around the area, produced by parish and town councils.

The Board’s voluntary wardens co-ordinate an extensive and very popular annual programme of free guided walks throughout the AONB. In 2009/10, the wardens organised 277 walks that attracted over 3,500 people. An analysis of the guided walks programme carried out in 2006 identified that the majority of people who participate in the walks are regular walkers, most of whom had been on at least five walks previously. The guided aspect of the walk and the interesting, interpretive information that is provided during the walk, along with the social aspects, are the key attractions for walkers. There is a real opportunity to try and attract more people onto these walks, particularly visitors to the area, as a way of increasing understanding of the AONB and encouraging visitors to other, lesser visited, parts of the AONB.

Because of the wealth of walking opportunities, a number of specialist walking holiday operators offer walking packages in the Cotswolds combined with accommodation, visits to attractions and, for long distance trails, luggage transfer.

The town of Winchcombe was recently awarded ‘Walkers are Welcome’ status which means that the town is nationally recognised as one which will endeavour to make walkers’ stay and experience a memorable one. Building on this status, the first Winchcombe Walking Festival was held in May 2010 and was generally regarded by local residents and businesses to be a great success with 180 people taking part in 17 walks. Feedback from walkers and visitors to the area was also very positive and there are plans to make this an annual event. More recently, Longborough and the Stroud parishes of Kings Stanley and Leonard Stanley have been awarded ‘Walkers are Welcome’ status. Stroud also hosts a popular walking festival which takes place in September as part of the Stroud Festival Fortnight. The Strolling in Gloucestershire festival is organised by the local authorities and takes place during the summer each year.

Cycling

Cycling is a popular activity in the Cotswolds. There is an extensive network of country lanes which link up the towns and villages and the topography of the area provides a range of easy and more challenging cycle rides.

Parts of the National Cycle Network pass through the Cotswolds and there are a number of long distance cycle routes in different parts of the area including:

- the 25 mile Cotswold and Feldon Cycle Route in South Warwickshire;
- the Bristol and Bath Railway path and Avon Cycleway covering parts of the south Cotswolds; and
- the Colliers Way.

The new Cotswold Line Cycle Route parallels the Cotswold Railway Line between Oxford and Worcester via the north Cotswold towns of Chipping Campden, Kington and Moreton-in-Marsh. There are plans to further develop the route to link it with other towns and routes along the National Cycle Network, as well as improve the signage and marketing.

A review of local authority and tourism websites shows there is some comprehensive information available about cycling in the Cotswolds including on-road and off-road cycle routes, maps and guides, many of which are freely downloadable from local authority websites and the AONB website. This includes a new series of six off-road cycle routes devised by the Board, and a series of cycle rides that start from the Kington train station in West Oxfordshire. Cycle rides starting from Kemble train station, near Cirencester are currently being updated

There are many cycle hire shops across the AONB, plus a number of specialist operators which offer guided cycle tours of the Cotswolds and surrounding area.

Several local cycle events take place each year including the Hell of the North Cotswolds which is an annual 100km and 50km cycle race that starts and finishes in Winchcombe. It attracts over 1,000 riders from across the UK as well as local cyclists. In addition annual cycle races take place at Blenheim Palace and Cheltenham Racecourse.

Horse riding

Horse riding is another popular recreational activity in the Cotswolds with 400 miles of public bridleways in Gloucestershire alone. The Sabrina Way is a 200-mile national riding route, of which around 28 miles traverses the north Cotswolds area. The British Horse Society publishes a leaflet of the Sabrina Way along with an accommodation list. The society also publishes a set of 13 'South Gloucestershire Circular Rides', plus the BHS Gloucestershire and Mid-Cotswolds Tracks and Trails Group are planning to publish a new, updated 'Cotswolds on Horseback' guidebook featuring 28 circular riding routes in the Cotswolds.

In the Cotswolds there are a large number of trekking centres and riding schools, plus some accommodation providers that cater for both horse and owner.

Other recreational activities

Cotswold Water Park: just south of the AONB is the Cotswold Water Park which has 140 lakes on which a vast range of water-based activities are available including kayaking, sailing, fishing and windsurfing. There are also a number of land-based activities including walking, cycling and riding, as well as nature reserves, country parks and the Cotswolds' only 'beach'.

Golf: there are many golf courses throughout the AONB including Cotswold Hills courses at Minchinhampton Common, Lansdown near Bath, Broadway, Chipping Sodbury and Cotswold Edge.

Hot air ballooning: Balloon flights are available in the Cotswolds from launch sites at Cirencester, Stroud, Bourton-on-the-Water and Cotswold Water Park.

Llama trekking: guided llama treks in the Cotswolds are offered with Cotswold Camelids, a few miles south of Stroud.

Gliding: Cotswold Gliding Club offer one-day courses, trail lessons and holiday courses from their base just outside Stroud.

Local food and drink

Support for local food in the UK has grown tremendously over the last few years as more people are becoming aware of the importance of fresh local produce and the need to reduce our 'food miles' as well as the desire to support local producers and the local economy¹³. Visitors also increasingly want to taste the local produce of the area when on holiday and many pubs, restaurants and accommodation establishments in the Cotswolds offer a good range of locally sourced food and drink.

Agriculture and farming is an important economy in the Cotswolds and the area is well-known for its variety of quality locally produced food and drink, particularly meat and dairy products. Some of the famous local produce includes Gloucester Old Spot pork sausages, smoked trout from Bibury, Cotswold ice cream and Cotswold Brie cheese.

Farmers' markets have become well established in the Cotswolds, and take place in many towns and villages within the AONB, offering a good range of local produce. Some of the larger markets tend to be located in the bigger towns within the setting of the AONB, such as Stroud, Tewkesbury, Bath and Cheltenham. In addition to farmers' markets, there are also a number of farm and speciality shops where local produce can be purchased such as Daylesford Organic, the Cotswold Food Store and the Highgrove Shop. Some local farmers now also sell their produce through local retailers, for example Budgens in Moreton-in-Marsh sells Hailes Abbey farm produce, locally grown flowers, Fosse Way honey and bees wax plus cooked meals by Simple Suppers prepared in a local farm kitchen.

¹³ Shopper Trends 2010, IGD

Arts & crafts

Many working artists and craftworkers are drawn to the Cotswolds AONB, inspired by the Cotswold landscape and nature. There are a number of opportunities to view and purchase local pieces of work at the many art galleries, craft centres and shops throughout the area.

The area around Stroud has become a centre for artists, writers, poets and craftspeople. There are many shops, art galleries, craft centres and other opportunities to see examples of local art.

Stow-on-the-Wold has become a centre of antique shops, particularly furniture. The village of Broadway is known for its art galleries and paintings. Chipping Campden still has a variety of artists and craftspeople working and exhibiting in the old Guild of Handicrafts building, as does the Gloucestershire Guild of Craftsmen gallery in Painswick.

Events & festivals

Events and festivals can be a good way to promote local traditions and culture, involving local people and helping to create a year-round destination. Many tourism authorities consider events to be a particularly important aspect of rural tourism, offering potential growth opportunities for generating short breaks and contributing positively to the image and profile of the region.

The Cotswolds has developed a reputation for staging a vast range of events, many of which are longstanding and unique, such as the Cooper's Hill Cheese Rolling; the Dover's Hill 'Olympicks'; the Tetbury Woolsack Race and Bourton-on-the-Water's 'Football in the River'.

Both Cheltenham and the City of Bath are home to a number of events of international standard. These include horse racing events and festivals of science, literature and music that draw thousands of visitors in to the area.

The horse trials at Badminton regularly attract up to 200,000 spectators over the four days, plus the trials and polo matches at Gatcombe are also popular equestrian events.

Music festivals in the Cotswolds have grown in popularity during recent years, including the Cornbury Festival in Oxfordshire and the very 'green' 2000 Trees Festival near Cheltenham.

An increasing number of towns in the Cotswolds hold annual food and drink festivals which are growing in popularity. These include Stroud, Tewkesbury, Chipping Sodbury, Tetbury and Chipping Norton. Stroud also holds a number of arts-related festivals each year such as the International Textile Festival, Fringe Festival and Arts Festival, along with an Open Studios event where local artists open their doors to the public. In 2010, Stroud's International Textile Festival, which builds on the area's history of wool growing and textile production, was awarded the gold award for tourism in the Cotswolds for small events.

While larger events and festivals can attract visitors into the area, local village fetes, flower shows and festivals are also popular places to visit, providing opportunities for visitors to buy local produce and crafts, as well as get to know some of the smaller, quieter places and their local residents. A new, potentially annual, Cotswolds Churches Festival in 2011 will help visitors to discover other parts of the Cotswolds along with its historical and cultural heritage.

Transport and access

The Cotswolds AONB lies between the M4, M5 and M40 motorways and therefore has easy road access from England's two largest cities: London and Birmingham. Other main centres of population, including Bristol, Coventry, Swindon and Cardiff are also within easy reach. London Heathrow, Birmingham and Bristol airports are all within 90 minutes journey time.

The AONB is crossed by a few busy arterial routes including the A40 which runs east to west between Oxford and Cheltenham; the Fosse Way which runs north to south through the middle of the AONB, linking the towns of Cirencester, Bourton-on-the-Water, Stow-on-the-Wold and Moreton-in-Marsh and, further north, Stratford-upon-Avon; and the A46 which links Cheltenham and Stroud with Bath. There is also an extensive network of minor rural roads. The A417 between Cirencester and Gloucester is a high speed road which, whilst improving the link between the M4 and M5 motorways, has brought with it an adverse impact on the tranquillity of the AONB.

Direct access to the Cotswolds by rail from London is good. The Cotswold Line travels through the north of the Cotswolds AONB with mainline railway stations at Moreton-in-Marsh, Charlbury and Kingham. There are also rail services from London to Kemble, near Cirencester, as well as Cheltenham, Gloucester and Stroud. Access to the Cotswolds by rail from the Midlands and South West is via Cheltenham and Bath with limited access directly into the AONB.

The existing bus network has largely evolved, and continues to be provided, to meet the needs of local communities. The very high levels of car ownership in the Cotswolds (88% of households have a car available) together with the very limited number of services that link urban centres across the AONB, mean that provision for visitors is generally restricted to times and routes when local people travel for work, health, education and shopping. Despite its limitations, an audit of public transport carried out in 2006 found that much of the AONB enjoys surprisingly good levels of travel provision on weekdays and from the limited number of key gateways into the AONB. Clearly, public transport can never match the freedom and flexibility of the car which will always remain the favoured mode of visitor travel to and within the Cotswolds. However, a sizeable minority of visitors, especially those from lower socio-economic groups, (and, in the future, increasing numbers of both younger professional and older visitors from the UK and overseas) represent a significant and perhaps growing market for public transport.¹⁴

Recent developments include a new bus stop at Moreton station with local buses starting from here to Stow, Bourton, Northleach, Cirencester, Chipping Campden, Broadway and Stratford-upon-Avon. Nevertheless, movement around the Cotswolds by public transport is perceived to be quite difficult. This is reflected in recent surveys by the number of local residents and tourism businesses who felt that public transport should be improved.

¹⁴ An audit of public transport for visitors to and within the Cotswolds AONB, 2006

MARKETING, INFORMATION & INTERPRETATION

Marketing and promotion

Destination marketing for the Cotswolds is primarily undertaken by Cotswolds and Forest of Dean Tourism, which has a Gloucestershire focus, and West Oxfordshire District Council tourism department, which focuses on the West Oxfordshire part of the Cotswolds, using the brand 'Oxfordshire Cotswolds'. In Gloucestershire, the local authority tourism departments work as part of the Cotswolds & Forest of Dean Tourism team to deliver destination marketing on the domestic level, while Cotswolds & Forest of Dean Tourism also undertakes international marketing campaigns, often in close working partnership with Visit Britain. For example, a successful joint promotional initiative recently took place in Osaka, Japan as part of the British Tourism Fair which involved the setting up of a traditional Cotswolds tea room in the Hankyu Department Store.

Warwickshire County Council and other tourism delivery agencies use the county's Shakespeare connections as a brand to promote tourism. Similarly, other tourism authorities in the AONB have developed their destination brands based on their own specific areas - Worcestershire, Wiltshire and Bath – highlighting the Cotswolds villages that are located there.

Each of the areas produces a range of destination marketing materials for their region which include:

- visitor websites with fully comprehensive information plus online booking facilities, and
- a visitor guide (in most cases) which features a wide range of accommodation, supported by advertising.

For Cotswolds & Forest of Dean Tourism and West Oxfordshire District Council, the AONB is significant. For the other tourist authorities, it forms a relatively small part of their area.

The Cotswolds Conservation Board produces a range of information material on the Cotswolds AONB, as shown below, but does not take the lead on proactive destination marketing campaigns.

Information and interpretation

There are 15 tourist information centres (TIC) and 3 information points located within the Cotswolds AONB and its setting. Five visitor information centres are accredited with the Green Tourism Business Scheme. The majority of these are open year-round and are mainly run by the local authorities; a few are run by independent organisations.

Generally, there is an immense amount of information and a large number of publications about the Cotswolds, but relatively little visitor-focused information that relates specifically to the AONB.

The main general information material produced for the AONB by the Board includes:

- Biannual 'Cotswold Lion' newspaper featuring a 6-month programme of guided walks. A print run of 110,000 copies is distributed to visitor centres, tourist information centres, large hotels, attractions and other public places via a local distribution company.
- A general guide to the Cotswolds AONB and its special features.
- 'Explore the Cotswolds by Public Transport' guide and timetables distributed to TICs, libraries and other public places, and downloadable from the AONB website.
- A range of downloadable walking and cycling information.
- Cotswolds AONB website which features information about the AONB, the work of the Board, plus a section for visitors to the AONB.

A series of six interpretation boards have also been placed by the Board at individual locations throughout the AONB. There is also a series of AONB boundary markers at 30 locations which help inform people that they are entering the AONB.

The guided walks led by voluntary wardens help to interpret the area to visitors and these are considered a very useful way of linking the AONB directly with visitors by providing the 'public face' of the AONB.

As part of the Board's Caring for the Cotswolds project, an interactive, educational video game for 7 – 12 year olds was developed to help interpret the history of the changing landscape. This is housed in 3 separate 'kiosks' which are located at the Cotswold Farm Park, Corinium Museum and the new 'Escape to the Cotswolds' discovery centre.

'Escape to the Cotswolds' – a recent development – has significantly enhanced visitors' interpretation of the AONB. It opened as a discovery centre in July 2010 and is housed in the Old Prison at Northleach, Gloucestershire, adjacent to the Board's office. The centre helps to tell the 'Cotswolds story' of its history, geology, landscape, nature, conservation, people and recreational activities using a range of interpretation panels and other materials.

FUTURE TRENDS & MARKETS

The tourism industry is a volatile one which is subject to a number of external influences including extreme weather, terrorist activity, exchange rates and strike action affecting travel, as well as changing economic and social patterns and behaviour. Future changes and developments in visitor activity will be influenced by a number of factors. These are likely to include:

Countryside leisure and recreation

The number of visitors to the countryside in the Cotswolds is expected to grow as is the tourism sector as a whole¹⁵. The timing of visits to the countryside is also changing with more use outside the peak summer months. In addition, the population of the AONB and the surrounding

¹⁵ The Future of Farming and Forestry in the Cotswolds AONB

area is expected to rise, resulting in more people seeking recreational opportunities in their immediate area. The increasing awareness of the importance of countryside accessibility to physical and mental health and well-being is a further driver.

The impacts of increased leisure use on the land are likely to include:

- greater use of the rights of way network;
- more permissive routes being opened up; and
- continued development of farm enterprises supplying the visitor market¹⁶.

Consumer research carried out as part of the South East Protected Landscapes (SEPL) project indicates a very strong level of interest in taking a break in the South East Protected Landscapes— with 84% of people interested in a trip including an overnight visit (Appendix E). Other research has also highlighted an increasing dissatisfaction with excessive consumerism and a need to seek a more wholesome, simple life such as working on a farm and foraging for food.¹⁷

Increase in the “staycation”

In 2009, there was strong evidence of a surge in holidaying at home, the so-called ‘staycation boom’, as UK consumers’ concerns over the recession meant less foreign holidays and more breaks in the UK instead.

Research carried out by Visit England at the beginning of 2010¹⁸ found that - as a result of an 18% increase in the number of people holidaying in the UK instead of going abroad during 2009 - the overwhelming majority were expecting to take at least one England break during 2010. The 2009 experience has improved opinions of holidaying at home for many, and left many keen to discover more. Almost half the population (and 70% of staycationers) expect that beyond 2010 they will take more holidays in the UK than they did in the past.

For many, the staycation boom has led to a rediscovery of the UK’s heritage and landscapes. This, coupled with a preference for camping or staying in caravan parks and self-catering cottages, should benefit countryside locations¹⁹.

Lifestyle changes

Demographic change resulting in an increasingly ageing population is likely to have a significant impact on domestic tourism in the coming years, as the older consumer will be more active than previous generations and will be working longer. They will be relatively well travelled and will increasingly seek to sample new destinations and experiences. A growth in interest in personal health and overall well-being has been apparent over the last decade and is likely to continue as

¹⁶ The Future of Farming and Forestry in the Cotswolds AONB.

¹⁷ Tomorrow’s Tourists: Fluid or Simple Identities?, Yeoman, 2010

¹⁸ Understanding the “Staycation”

¹⁹ SEPL visitor research review (Appendix E)

many people feel that the resource they most lack in their lives is not money or time, but energy²⁰.

Green tourism

An increased awareness of the environmental impact of tourism may lead to more visitors seeking 'green tourism' breaks in areas that are considered to be sustainable and well managed. The Cotswolds is well-placed to be able to target a more environmentally-conscious market. There are many excellent 'green' initiatives in the Cotswolds based around use of renewable energy, promotion of local food and contemporary arts and crafts, and sustainable living. Two such examples include the Green Shop in Bisley which attracts many visitors because of its reputation as a leading UK environmental retailer; and the award-winning Toddington Village Hall is an exemplar renewable energy community project. The Stroud-based Cotswolds Green Tourism Weekend itinerary has also provided a useful pilot project on which to build more similar itineraries based on sustainable tourism products and ideas.

Some evidence suggests that while some people - particularly 'empty nesters', affluent pre-family couples and those actively engaged in environmental issues - may be willing to pay more for sustainable accommodation, consumers in general are only likely to choose sustainable options if they require little or no sacrifice in terms of cost, time or quality of experience.²¹ The greatest potential for green tourism lies in the fact that most visitors expect that a business should be taking action and will respond positively to efforts that make their trip 'greener'.

Resilience to increasing fuel and food costs

This is particularly relevant to rural tourism in the Cotswolds, involving buildings or locations that are poor energy performers (due to age/design), and are more likely to be using expensive sources of fuel (e.g. oil, gas canisters, coal). The costs of these fuels are predicted to increase four-fold by 2020. Such locations are also affected by being more isolated and therefore having higher delivery costs. Furthermore, because of a greater dependence on car access, they are more vulnerable to the possible impacts of increased vehicle fuel prices.

The need to develop resilience to increasing fuel and food costs through the purchasing of more local produce and supplies as well as renewable energy will be an increasingly important consideration for tourism businesses in the future.

Access for all

There is an increasingly strong focus on the need to provide equal access to tourism facilities and services for visitors with disabilities, as well as visitors from under-represented groups such as those from disadvantaged areas and ethnic minorities. The quality of facilities and services should be at a level that meets or exceeds all visitor expectations²².

Natural England highlights an enhanced role for protected landscapes in increasing public enjoyment, health and well-being, particularly for socially excluded individuals and groups. This

²⁰ What is the Future of Domestic Tourism to 2015? 2005

²¹ England Domestic and International Market Profiles

²² Sustainable Tourism in England: A framework for action

is turn will further people's understanding of these places²³. An increasingly ageing population means that the issues around accessibility could become an important issue for a significant number of our potential customers. Even those not registered as having a disability will need greater assistance with regard to mobility, sight and hearing. Destinations that adapt will benefit from this growing market and it should be a priority.²⁴

Climate change

Climate plays a major role in destination choice and tourism spending. For many destinations, including the Cotswolds, tourism is closely linked to the natural environment and its attractiveness. Changes in water availability, biodiversity loss, reduced appeal of landscapes affected by drought, coastal erosion, flooding and depleted resources, will all impact on tourism in varying degrees from place to place and over time. The tourism industry also faces a political imperative to manage carbon output and therefore must try to grow the visitor economy within limitations that are increasingly challenging while making the experience appealing to visitors²⁵.

Visit England's new Sustainable Tourism Framework for Action states the need for tourism to mitigate climate change as well as adapt to the changes it will bring. Encouraging businesses to become more sustainable and engage in green schemes, and encouraging visitors - through marketing messages - to make responsible decisions, are some of the things that can be done to help mitigate and adapt to climate change. There is also a need to manage the impact of tourism in the Cotswolds on the global environment in terms of carbon emissions. A significant number of visitors have travelled long-haul to reach the destination and therefore their carbon footprint is greater than average. The draft guiding principles for tourism transition in the South West state the overarching principle for growth in the tourism industry is a commitment to sustainable low carbon growth. This can be possible through a combination of:

- Increasing length of stay
- Improving public transport and increasing its use
- Improving resource efficiency in businesses
- Encouraging visitors from local markets
- Increasing the use of local suppliers and supplies

The anticipated impacts of climate change in the Cotswolds include warmer weather which is likely to lead to increased demand for recreation and countryside visits. The increase in the number and intensity of tourism visits to the Cotswolds will provide diversification opportunities for farmers and woodland owners, and could increase the profile and demand for products from the area²⁶. Other impacts of climate change include changes to the landscape, biodiversity, natural resources and the historic environment. The Conservation Board, through its

²³ Natural England's Position on Protected Landscapes, 2010

²⁴ Principles for Success. Guidance for tourism transition in South West England, 2010

²⁵ England: A Strategic Framework for Tourism 2010-20

²⁶ The Future of Farming and Forestry in the Cotswolds AONB 2009

Management Plan, promotes a partnership approach to mitigate and adapt to climate change in the AONB.

Economic downturn

Over the coming years the effects of the recession are likely to be felt in all communities as a result of the reduction in public sector spending, reduced incomes and higher unemployment. This may lead to an increase in domestic tourism due to a reduction in the number of holidays taken abroad. An economic downturn in overseas markets might also lead to a reduction in overseas visitors which would impact on businesses in the Cotswolds, many of which rely on these markets for a significant part of their income. Conversely, a weak pound can make the UK more attractive to overseas visitors and therefore could result in greater numbers of visitors from abroad.

POTENTIAL FUTURE OPPORTUNITIES & MARKETS

There is a limited amount of visitor research available that specifically deals with the Cotswolds area. However, a number of surveys have been carried out on a local and regional basis to identify target markets of future potential visitors.

1) Sustainable Tourism in our Finest Landscapes

As part of the SEPL project *Sustainable Tourism in our Finest Landscapes*, a survey of potential visitors from London and the South East was conducted which found a very strong level of interest in taking a break in the South East Protected Landscapes – with 84% of people interested in a trip including an overnight visit. Given the population of London and South East England, this high figure strongly suggests that, if only a small proportion actually translated into business, it would provide very significant incomes to local communities and help support the conservation of natural and cultural heritage.

2) Perceptions of the Cotswolds

Cotswolds & Forest of Dean Tourism undertook research using the ArkLeisure segmentation model, to identify visitor and non-visitor perceptions of the Cotswolds, along with a profile of the market segments that are most likely to be interested in visiting the Cotswolds (see Appendix G for details of the ArkLeisure segmentation model).

The results included the following:

- The current and potential market is the older, 'empty-nester' market.
- The Cotswolds does not currently have a strong appeal for the family market.
- The current market is the independent minded person: Cosmopolitan, Traditional, Functional.
- Potential markets include: Traditionals, Habituals, High Streets, Discoverers
- People associate countryside and villages with the Cotswolds, along with walking, open space and farming.

- Because of its rural image, it is seen as a place where a car is needed, but also a quality place, with a tourist offering, a year-round destination which is easy to access.

3) South West Tourism Profile of Potential Visitors 2009

This research survey conducted by South West Tourism found the following:

- 39% of the population of England, Scotland and Wales are very interested in taking a holiday or short break in the South West of England.
- The countryside is the biggest attraction.
- The opportunity which the South West offers to relax and unwind appeals to more females than males of all ages.
- Older potential visitors are more attracted to the South West for its cultural experiences, although there is significant interest in the same experiences by some younger segments.
- Older visitors are more likely to seek relaxation and learning while younger visitors have a higher demand for pubs and nightlife.
- The tourism segments which have the highest interest in visiting the South West are:
 - Discovery families
 - Social and Visiting Friends & Family
 - Young Culture & Explorers
 - Cultural Greys

The research highlighted some of the perceptions of the South West by non-visitors, and barriers to visiting. These included:

- The South West is seen as peaceful and relaxing, traditional and charming
- Lack of guaranteed sunshine
- Cost
- Distance to destination
- Not different enough culturally
- Lack of distinctiveness
- Lack of awareness of the region

Some of the opportunities suggested to counteract the above barriers include: better promotion of holiday deals; promoting the more distinctive, unusual and interesting aspects; focusing on being 'environmentally-friendly' along with good quality, fresh, local food.

While this survey was conducted for the whole of the South West, of which the Cotswolds is just a small part, it nevertheless can provide some useful, broad information regarding potential markets and barriers to visiting the Cotswolds.

The full survey reports can be found on the South West Tourism website:
www.swtourism.org.uk.

Future Target markets

From the research previously highlighted, the following future market segments are suggested as potential markets which could be targeted with specific tourism products in the AONB:

General primary markets:

Day visitors

Because of its proximity to large areas of population, particularly London and the South East, the Cotswolds receives a very high number of day visitors. This market should be viewed as an opportunity to build upon and convert to longer or overnight stays. Day visitors could be targeted with specific experiences such as off-road cycling, circular country walks, local food, farm stays and heritage trails. Local green car hire could be a future consideration and could be used to encourage people to arrive by train.

Short breaks

The trend for taking short breaks in England is likely to continue. It will provide an opportunity for growing the value of tourism and spreading seasonal and geographical coverage. Encouraging visits during off-peak seasons and mid-week is particularly important and there is scope to develop this by targeting older visitors with greater flexibility as well as visitors with special interests such as gardens and wildflowers, walking and heritage.

Couples – empty nesters and early retired

This is an important market which is ideally suited to the Cotswolds, evidenced by current visitor research. This market has the flexibility to visit during off-peak periods as well as during mid-week and therefore can help in generating year-round business.

Key niche markets:

Walkers

The opportunities for walking in the Cotswolds are particularly strong and it is likely that this market will continue to grow as more people seek active holidays in the countryside as part of a healthy lifestyle. The Cotswold Way offers good scope for developing short-break walking packages with accommodation, especially if more low-cost

accommodation options can be developed along the trail. Walking can also enhance the visitor experience, particularly as a way of exploring the more hidden areas of the Cotswolds. The recent acquisition of 'Walkers are Welcome' status for Winchcombe, Longborough, Kings Stanley and Leonard Stanley, along with the walking festivals, offer greater scope to develop the walking sector.

Cyclists

The hills and country lanes and tracks of the Cotswolds are ideal for cyclists. Plans for new cycle routes, both on and off-road, will create new opportunities for these markets. There are many accommodation providers who welcome cyclists and there are a number of cycle hire companies in the Cotswolds. The SEPL research on specific themed breaks found "accommodation with bikes and pre-planned cycle routes and picnic or pub lunches" to be of particular interest among potential visitors.

Rural activity, environmental and conservation interest

The Cotswolds AONB already has a strong reputation for providing a comprehensive programme of rural skills courses. The initial development work for the SEPL project in the Cotswolds identified the potential for short-break packages which combine accommodation and practical courses to learn rural skills such as dry-stone walling. Rural courses combined with a stay on a working farm and discovery of the local area could provide an authentic countryside break.

There is also an opportunity to target the environmental market by building on the pilot Cotswolds Green Tourism Weekend concept and develop interesting, 'green' short break itineraries. This links closely with the SEPL project which is being developed in 2011.

Health & well-being

Interest in the health and well-being sector is likely to continue to grow as more people seek holidays for relaxation and the opportunity to 'get away from it all'. There is much potential for the Cotswolds to make a significant contribution to raising awareness about the health benefits of exercise and recreational activities in the countryside and providing opportunities for both residents and visitors to gain such benefits.

Historic and cultural heritage interest

The Cotswolds' distinctive historic and cultural heritage has much to offer visitors with a special interest in this area. Themed short break and day itineraries, along with more 'experience' type products, could be devised to target this market and more collaborative working with other similar organisations such as National Trust should be developed.

Nature and geological interest

This is another distinctive strength of the Cotswolds with much to offer in the way of nature and geology trails, nature reserves, quarry visits and other themed itineraries. New products should be developed in conjunction with local wildlife trusts, the RSPB, geology trusts and other similar organisations in the Cotswolds.

People with disabilities

This is a large potential market for the AONB. The Cotswolds is ideally suited to appeal to a wide range of people with disabilities who could be targeted with packaged products based around accessible accommodation and 'walks on wheels' routes. The Board has already engaged with the Disabled Ramblers through visits to parts of the AONB, and has achieved a significant amount through the wardens' 'Walks on Wheels' series. There is scope to develop more of this type of collaborative working to promote the Cotswolds to visitors with disabilities.

STAKEHOLDER VIEWS

A good understanding of visitors, businesses and the views of local residents and a wide range of stakeholders is integral to the development of a tourism strategy; this is also a key requirement of the European Charter. In preparing this strategy, surveys were conducted with local residents of the Cotswolds and with tourism businesses. The summary of results from both these surveys is in Appendix D. In addition, a balanced view of local stakeholder opinion was obtained from three workshops held in different geographical parts of the AONB.

There have also been a number of regional surveys conducted quite recently among businesses and visitors which help to provide a wider picture of the views of a range of stakeholders.

A full list of these surveys, along with other reference sources, is provided at the end of this document.

The views of local residents

A survey was conducted to find out attitudes towards tourism by residents of the Cotswolds. The survey was included in the Spring/Summer 2010 edition of the Cotswold Lion newspaper and placed on the Cotswolds AONB website. In addition, the survey was promoted by tourism authorities, local rural community councils, and was also publicised in the local press and on the radio. A total of 415 responses were received, the majority (71%) from people living within the AONB. The remainder of respondents were primarily from surrounding towns and villages. It should be noted, however, that the number of responses is a tiny proportion of the total number of people living in the area therefore they are only an indicator and cannot be considered statistically accurate.

The majority of residents like living in the Cotswolds, with 79% stating that they like living there a lot. When asked what they most liked about living in the Cotswolds, the vast majority of residents stated that the countryside, natural beauty, views and landscape were their favourite aspects. Other features most highly rated by residents were the peace and quiet, friendly communities, attractive villages and towns, good access to the countryside, walking opportunities and easy access to cities and other parts of the UK.

Comments regarding aspects of living in the Cotswolds that residents disliked included the high cost of living and expensive house prices, heavy traffic in some areas particularly HGVs, lack of public transport options and poor condition of roads.

Most of the respondents were not involved with tourism through their work, although 30% had some people in their household whose work brought them into contact with visitors. The overwhelming majority of residents who responded believed that tourism is good for the Cotswolds, with 88% indicating that tourism is important for the local economy. These findings concur with those of the South West Tourism Survey of Local Attitudes 2006 which found widespread appreciation throughout the region for tourism, with 96% stating that tourism was good for their area.

In terms of visitor numbers, 21% believe that numbers have increased significantly in the last five years, 48% believe they have increased a little and 24% believe they have remained the same. In the main, residents felt that the Cotswolds has about the right number of visitors, although 30% felt that it would benefit from more. Only 10% believed that it receives more visitors than it can cope with.

From the additional comments given, the general opinion by residents regarding visitor numbers concerns the need for a better geographical and seasonal spread of visitors. Many residents believed that there is considerable pressure on the more popular honeypot areas such as Bourton and Stow, while other areas receive very few visitors and could benefit from more. Specific areas of concern related to traffic and parking.

Most felt that tourism was affecting their way of life a little and that this was broadly positive. The good aspects of tourism included the choice of places to shop, eat and drink, the range of attractions and leisure facilities, opportunities for jobs and maintenance of historic buildings. Bad aspects related to traffic, litter, parking and noise. Some aspects were considered to have no effect from tourism, for example the provision of public transport, noise, wildlife and plants, views and landscape.

In terms of the relationship between visitors and local residents, this was generally positive with many believing that they benefit from the facilities and services created for visitors, they enjoy meeting visitors, and are welcoming and friendly towards them.

Almost half the respondents felt that tourism in the Cotswolds was managed in a sustainable way, but 38% did not know. There is, therefore, a need to communicate the sustainability issues and responses more effectively to local residents.

There were a range of general comments regarding tourism by residents, which can be summarised as follows:

- Tourism is important to the Cotswolds but it needs to be managed and coordinated better with regard for the residents and the environment.
- There is a need for better public transport provision and information.

- There is a need for more visitor information centres in towns and villages.
- Tourism should be promoted across a wider area, and not concentrated on the busy areas.
- The benefits of tourism should be spread throughout the year.
- Parking facilities and capacity need to be improved.

There is a need for better engagement with a higher proportion of local residents in the future so that more feedback can be obtained, leading to a greater understanding of the important issues among residents in the Cotswolds.

The views of local tourism businesses

The Board conducted a survey among tourism businesses in the Cotswolds to gain a greater understanding of their current and future activities, issues and challenges. Responses were quite low with 33 questionnaires completed. Nevertheless they provide a useful overview of local business opinion and can be supplemented by other regional research on businesses to gain a clearer picture.

Of those who responded, 42% were serviced accommodation providers, 27% were self-catering and 12% were attractions. The majority had been operating for more than five years and employed full-time staff, year-round, therefore suggesting very little seasonal employment.

Regarding the origin of their customers, 21% from London and the South East, 24% from the local area, 28% are from elsewhere in the UK and 24% from overseas. The average length of stay is three nights which highlights the importance of short breaks in the Cotswolds.

Recent trends in business performance are reasonably encouraging with 46% showing a growth in business and 29% staying the same during the past year.

Customers are mainly older or middle-aged couples. There are relatively few families.

In terms of being sustainable, tourism businesses are already quite active in a number of areas:

- 88% promote local produce and goods;
- 74% promote alternative transport options eg bus, train, cycle;
- 41% are involved in a sustainable tourism or environmentally-friendly initiative; and
- 57% actively promote green or sustainable credentials to visitors.

Over half the businesses promote themselves as being part of the Cotswolds AONB and have recently visited the AONB website, 82% of whom rate it as a good website. While this is encouraging, it indicates more effort is required to encourage businesses to value the AONB and use it in their promotion.

Overall, businesses surveyed see the importance of the AONB for keeping the area natural, as well as being a source for information and a possible basis for promotion and networking. The designation helps them affirm the beauty of the area.

The main challenge faced by businesses over the next five years was considered to be the state of the economy and the potential downturn of visitors.

The key priority areas that need to be addressed in terms of developing and promoting tourism in the Cotswolds are the need to provide a variety of quality information for visitors to the area and to enhance the overall marketing and profile of the destination. The need for better and more frequent public transport was also considered to be an important factor.

Stakeholder feedback from workshops

Three workshops were held in different geographical areas of the AONB and attended by almost 60 participants, with a good mix of public sector officials, private enterprises and community and conservation interests represented.

Following presentations on the AONB, the Cotswold Way National Trail and a general overview of sustainable tourism and the European Charter, participants split into groups to discuss a pre-prepared list of suggested aims for sustainable tourism in the AONB and the priorities for action.

The key aims that the groups felt had overall significance were:

- To raise awareness and understanding of the AONB, including among schools and local residents.
- To provide 'access for all' in different types of outdoor activities and create linkages between them.
- To promote the use of existing public transport services more effectively, rather than concentrating on new services.
- To encourage quality and environmentally sound practices among businesses.
- To maximise the economic benefit of tourism with provision for disadvantaged visitors.
- To increase understanding of existing and potential visitor markets, and knowledge of the impacts of tourism on the area.

In terms of the priorities for action, participants suggested a range of activities that should be considered, as outlined below. This isn't an exhaustive list, but highlights those areas which appeared to attract most support from participants.

- *Market selection and targeting*: there is a need to understand the profile of our visitors; to appeal to a wider, more diverse audience; and to promote the AONB to local people, schools and the hinterland residents.

- *Branding and promotion:* aim to change traditional perceptions of the Cotswolds ie show that there is more to it than pretty villages; develop a better website for visitors that links the AONB with tourism authorities.
- *Information and interpretation:* develop ambassador businesses for the AONB through awareness raising and training; provide an integrated network of information points throughout the AONB including the use of new IT techniques.
- *Public transport:* provide strong and creative promotion of public transport options.
- *Countryside access and recreation:* increase the range of activities available; strengthen promotion and awareness of access routes; help visitors plan their own routes; provide more off-road cycling
- *Product development:* develop and promote a range of sustainable tourism itinerary ideas, events and themed packages, particularly those that link with special features and conservation activities in the AONB; provide more farm visits, more campsites and low-cost accommodation; make more of small heritage sites for interpretation and as attractions
- *Local produce:* encourage businesses to 'buy local'; and develop initiatives to promote local produce among visitors and local communities.
- *Working with businesses:* encourage more businesses to adopt sustainable practices and gain 'green' accreditation; engage more with businesses through communication, events and networking.
- *Community management and action:* encourage local people to work together and support sustainable tourism including the management of visitors particularly in the 'honeypot' areas.

The workshops also included discussion about the structures and processes that would best involve stakeholders with the AONB. It was agreed that the current situation is complex partly because of the size of the area and the boundaries that it crosses, and that these are changing times with many future uncertainties. The concept of a Sustainable Tourism Partnership for the Cotswolds was broadly supported. It was felt that this should reflect different areas and interest groups as well as relate to local communities and fully engage local businesses.

SWOT ANALYSIS

The assessment of tourism in the Cotswolds AONB, based on the research, consultation and evidence gathered for the preparation of this strategy is summarised in the following SWOT analysis.

The Cotswolds AONB has a significant number of strengths:

- 👉 Well-established and high-profile destination across the UK and overseas;
- 👉 AONB designation - the largest in the UK and second largest protected landscape in England after the Lake District;
- 👉 Internationally important wildlife sites and habitats;
- 👉 Extensive range of information and publications available;
- 👉 Good walking infrastructure including Cotswold Way National Trail and network of recreational routes;
- 👉 Visitor loyalty – high level of repeat visits;
- 👉 Effective and wide-ranging destination marketing and PR activities undertaken by tourism authorities;
- 👉 Many cultural attractions
- 👉 No significant damage to nature/landscape as a result of current tourism levels;
- 👉 Friendly people and communities;
- 👉 Peace and tranquility;
- 👉 The work of the voluntary wardens;
- 👉 High-quality natural and built environment;
- 👉 Nearby attractive and historic gateway towns and cities eg Bath, Cheltenham, Oxford, Stratford;
- 👉 Close proximity to two World Heritage Sites: Bath and Blenheim Palace;
- 👉 Strong TV and film location;
- 👉 Wide range of quality visitor facilities and services;
- 👉 Strong support among businesses for sustainable tourism activities;
- 👉 Accessible location by road and rail for South East, Midlands, South West;
- 👉 Tranquility; and
- 👉 Relative remoteness - can 'get away from it all' despite proximity to large towns and cities

But there are some areas of weakness:

- 👉 Generally considered to be an expensive destination;
- 👉 Few low-cost accommodation options eg camping and youth hostels;
- 👉 Limited range of public transport options, especially on Sundays and Bank Holidays, and heavy reliance on car;
- 👉 Low presence of AONB in current visitor information;
- 👉 Lack of up-to-date visitor statistics and trends data for the Cotswolds area;
- 👉 Concentration of visitors in honeypot areas leading to visitor pressures;
- 👉 Perception that the Cotswolds has little to offer younger people and families;
- 👉 Very large and administratively complex area;
- 👉 Limited parking facilities in popular towns and villages;
- 👉 Fragmented and overlapping tourism management and marketing with competing Cotswolds 'brands';
- 👉 Some confusion over the geographic boundaries and what constitutes the Cotswolds;
- 👉 High dependence on day visitors;
- 👉 Limited and patchy mobile phone coverage;
- 👉 Poor road maintenance in some areas;
- 👉 Some residents' concerns about parking, litter and congestion; and
- 👉 Lack of private sector tourism association for area as a whole.

There are many opportunities for development:

- ☞ New product development based on Cotswolds' special features eg walking, cycling, conservation, local produce, nature;
- ☞ Increasing importance of countryside for health and wellbeing;
- ☞ Increase in domestic holidays/'staycations';
- ☞ Growth in niche product areas eg 'glamping';
- ☞ New discovery centre: 'Escape to the Cotswolds'
- ☞ Growth in heritage tourism
- ☞ Doubling of the Cotswold Line track leading to improved rail services
- ☞ Increasing developments in and use of mobile technology
- ☞ Growth in 'access for all' holidays and recreation
- ☞ Olympic Games 2012
- ☞ Development of new Local Enterprise Partnerships and potential for cross-boundary working
- ☞ Scope to develop European market
- ☞ Scope to market the Cotswolds as a whole
- ☞ Scope to convert day visitors to staying visitors through suitable product development

There are also some threats:

- ☞ Public sector funding cuts to support tourism, leisure, museums and galleries;
- ☞ Economic downturn;
- ☞ Increased competition from other UK destinations and overseas;
- ☞ Potential decrease in overseas visitors (but also a potential increase);
- ☞ Abolition of Regional Development Agencies and associated funding;
- ☞ Climate change and adverse/extreme weather;
- ☞ Increasing legislation and regulations putting extra strain on small businesses;
- ☞ Potential habitat damage/erosion by increased visitors in the future;
- ☞ Increase in pressure on honeypot areas;
- ☞ Increase in people moving to the AONB, particularly the retired;
- ☞ Uncertainty in the land use planning system caused by the revocation of Regional Spatial Strategies which could lead to inappropriate development within the AONB.

Summary of key issues

From the SWOT analysis a number of key points relating to tourism in the Cotswolds can be summarised as follows:

- There is widespread support for the development of a sustainable tourism industry in the Cotswolds with a real focus on local distinctiveness and on increasing environmentally sustainable practices.
- The Cotswolds has a strong foundation on which tourism and conservation can work in partnership and be mutually beneficial.
- The Cotswolds offers a high-quality tourism product and much potential for developing a range of niche and special interest product areas and targeting new markets.
- There are many strengths and opportunities relating to countryside recreational activities, particularly walking and cycling.

- Closer and more collaborative working between both the public and private sectors is needed across the Cotswolds to ensure more efficient use of resources and strengthen the Cotswolds destination 'brand'.
- Increasing volumes of car traffic in the Cotswolds and a perceived lack of public transport are key issues which need to be addressed.
- There is a need to develop more specific visitor focused information about the AONB in a variety of formats and media.
- A clear and consistent message about the Cotswolds brand, its sense of place and distinctive features needs to be developed.
- There is a lack of up-to-date information about visitor profiles and patterns and tourism trends in the Cotswolds.
- The need to create a prosperous and year-round tourism industry is a key consideration, particularly in light of an uncertain economic future.

STRATEGY

This section sets out the strategic context for tourism in the Cotswolds. Based on the previous assessment and the results of the local research and consultation with stakeholders, the strategy outlines the aims, vision, objectives and action areas over the next five years.

STRATEGIC AIMS AND VISION

The role of the Cotswolds Conservation Board

The Cotswolds Conservation Board has a remit that covers the whole of the Cotswolds AONB. It needs to play a clear role in the support and development of sustainable tourism in the Cotswolds, strengthening its co-ordination, communication and partnership working with the various tourism stakeholders. While the primary role for the Board is in environmental conservation and enhancement, information, interpretation and encouraging the enjoyment of the special qualities of the Cotswolds, it can also engage in marketing and support for tourism enterprises. However its role should not seek to duplicate the functions of others, but rather strengthen, support and co-ordinate the delivery of sustainable tourism; focusing on ways in which the Cotswolds tourism industry and the management of the AONB can be mutually beneficial.

The support and participation of the tourism authorities are vital in making this strategy work. These organisations carry out a great deal of effective destination marketing and management in each of their areas, including research, product development, information services and training. They also have the benefit of direct, day to day contact with hundreds of tourism businesses across the Cotswolds. Therefore there needs to be a sound working relationship between the Board and the tourism organisations. This provides a mutual understanding of each other's roles and a willingness to work in partnership on the delivery of the strategy and action plan. There is a real opportunity to improve current practice for the benefit of the visitor, local business and resident.

Strategic aims

- For the Cotswolds to be widely recognised as an exemplar in sustainable tourism.
- For visitors to gain a greater awareness and understanding of, and respect for, the natural, cultural, historical and built environment of the Cotswolds, and why and what makes the Cotswolds such a special place.
- For tourism to make a positive and sustainable contribution to the local economy and the environment.
- For all people to be able to easily access the Cotswolds for quality, quiet enjoyment and exploration of the area.
- For a better understanding to be gained of the Cotswolds tourism industry in terms of visitor profiles, trends, community and environmental impacts and business performance.
- For tourism to be managed in such a way that it provides a quality experience for visitors, while minimising the impacts on the environment and local communities.
- For the delivery and management of tourism across the Cotswolds to be achieved through a partnership approach with all key stakeholders fully involved in the decision-making and implementation processes.

Vision for sustainable tourism in the Cotswolds

The above aims, along with the findings of the consultation workshops, surveys and research, can be incorporated into the following vision for the Cotswolds:

By 2016: the Cotswolds is widely recognised and valued as a sustainable visitor destination, where local communities benefit, businesses prosper and the environment is sustained through the co-ordinated delivery of quality and enriching visitor experiences.

KEY STRATEGIC OBJECTIVES

The strategic approach and vision outlined above forms the basis for the following key objectives that should form the framework for the sustainable tourism action plan in the Cotswolds over the next five years. The relevant European Charter principle that relates to each objective is highlighted underneath.

1. To strengthen the identity and raise awareness of the Cotswolds as a sustainable destination, recognising and promoting its special qualities and designation as an AONB.
(Principles 3,4,5,7,9)

2. To maintain a high-quality environment and develop initiatives whereby tourism can contribute to the conservation and enhancement of the Cotswolds landscape and environment.
(Principles 3,6,7,8,10)
3. To encourage a wider understanding and appreciation of the Cotswolds' natural, historic and cultural heritage.
(Principles 3,5,6,7,8,10)
4. To work with tourism businesses to develop and promote new product ideas based around the special qualities of the Cotswolds AONB and aimed at encouraging longer stays throughout the year and quality visitor experiences.
(Principles 4,5,6,10)
5. To actively support and encourage tourism businesses to develop and promote environmentally sound and sustainable practices to improve their competitiveness and the quality of tourism offered, and act as ambassadors for the AONB.
(Principles 3,4,5,7,8,9,10)
6. To improve the understanding and management of visitor flows, both geographically and seasonally, to ensure that tourism maintains the quality of life of local residents in the Cotswolds and makes a positive contribution to the local economy.
(Principles 8,9,10)
7. To encourage wider access, exploration and quality provision to attract all people.
(Principle 4,5,7,10)

ACTIONS

1. To strengthen the identity and raise awareness of the Cotswolds as a sustainable destination, recognising and promoting its special qualities and designation as an AONB.

Action areas:

a. Maximise the promotion of the AONB through online, print and PR materials as appropriate

Promotion of the AONB to visitors should be achieved in partnership with tourism organisations which have greater and more direct reach to visitors. The Board needs to strengthen links and work closely with tourism authorities to ensure that the special values of the Cotswolds are clearly promoted in marketing materials and on websites. Where possible, joint initiatives with tourism authorities should be supported to help raise the profile of the AONB and promote it as a sustainable tourism destination, ensuring sensitivity to the different geographical and seasonal needs and capacity.

Whilst there are excellent destination websites managed by tourism authorities in the Cotswolds, there is a need for an effective, visitor-friendly website for the Cotswolds AONB. The existing website contains a great deal of information about the AONB, but is not visitor-focused. The content should be improved and strengthened to encourage greater use by visitors. Opportunities for greater interactivity with the AONB online should also be strengthened eg through an enhanced presence on social media platforms. In particular, improvements should include:

- Develop a new AONB website for visitors, focusing on the range of opportunities to explore and enjoy the countryside including events, walking, rural skills and other outdoor activities.
- Provide a greater range of appropriate visitor information eg Green Tourism Business Scheme, sources of locally produced food, country events, downloadable itineraries, sustainable transport, etc.
- Providing clear links on tourism websites to key sources of visitor information, for example, online accommodation booking.
- Encouraging visitor interaction through the development of an AONB Facebook page, YouTube channel and, possibly, a blog, plus continued use of the Twitter page.

While there are excellent visitor guides for the Cotswolds covering accommodation, attractions and activities, there is very little printed information about the AONB specifically aimed at visitors. As there is often confusion over the actual area of the AONB, development of a comprehensive map and guide for visitors would help to raise its profile and provide information about what it has to offer. This would be a factual, useful document (rather than one with many evocative messages which is adequately covered by the area visitor guides) and would be aimed at visitors already in the AONB.

b. Develop a strategic approach for promoting the whole of the Cotswolds as a sustainable destination.

There are many local and tourism authorities across the Cotswolds that carry out a wide range of tourism marketing and development activities. During the last few years, a great deal of progress has been made to streamline activities and reduce duplication resulting in a more effective destination marketing approach. To strengthen this further across the wider Cotswolds area, tourism authorities should be encouraged to work more closely together and co-ordinate activity to strengthen the identity of the Cotswolds and ensure more effective use of resources.

There is also a real opportunity to promote the Cotswolds as a sustainable destination. A wide range of promotional and marketing materials are produced across the area which have a range of environmental impacts. The use of sustainable techniques and waste reduction can help minimise this impact. Improving the type, quantity, format and range of materials produced, offers a significant opportunity to further reinforce the overall sustainability message.

c. Develop and promote a Cotswolds AONB toolkit for tourism authorities and businesses to use, which promotes a consistent message, clarifies the identity and distinctiveness of the AONB and helps to develop more sustainable tourism.

The AONB has a distinctive and well-established logo and identity which was developed with the creation of the Cotswolds Conservation Board. Further work is required to promote the values and identity of the AONB, by developing a comprehensive toolkit of messages, facts, image library and logo usage, along with suggestions for encouraging off-peak tourism, longer stays, lower impact travel etc. Appropriate tourism businesses could be encouraged to use the toolkit. It would enable them to:

- effectively communicate the special qualities of the Cotswolds in their marketing literature
- communicate with visitors about their own unique selling propositions.

Having such a toolkit in place will help to promote a consistent message across the Cotswolds related to the special qualities and distinctiveness of the area, as well as its sense of place. It will also help to encourage businesses to become ‘ambassadors’ for the Cotswolds as outlined in 5 below and help them to develop more sustainable tourism.

d. Work with businesses and tourism authorities to encourage visitors to reduce the impact of their visit, while enhancing their experience of the Cotswolds.

Some tourism authorities adopt different methods of encouraging visitors to be ‘green’ during their stay in the area eg through information on websites, visitor guides and via information cards provided for businesses to pass on to their customers. This should be further supported and developed to reach out to the wider visitor audience.

e. Build on existing signage and develop new signage opportunities to increase awareness of the geographical area of the AONB.

The consultation workshops indicated there is some confusion over where exactly the Cotswolds AONB lies. There are a number of boundary markers placed at strategic entry points around the AONB, however more could be done to enhance the geographical awareness of the AONB. The production of a visitor map for the AONB as indicated above will help to address this. However, entry signs on roads into towns and villages within the AONB could also provide an opportunity to promote the AONB message to both visitors and local residents, without adding to the signage ‘clutter’ eg incorporated alongside the town or village name sign. Town centre ‘welcome’ boards can also achieve this purpose.

Action should include a review of signage and identify opportunities, in conjunction with local communities, where existing signage, particularly those that are due for replacement, could be used to promote the message of being within the AONB.

2. To maintain a high-quality environment and develop initiatives whereby tourism can contribute to the conservation and enhancement of the Cotswolds landscape and environment.

Action areas:

a) Develop a range of conservation holidays and short breaks by building on the rural skills programme to enhance the range of courses and include accommodation

The Board has built up a strong annual programme of rural skills courses including dry-stone walling, green woodworking, hedgelaying and thatching. Participants on these courses have come from the local and regional area, but also a significant number come from further afield and therefore combine it with a short break in the Cotswolds.

The SEPL project identified conservation holidays and short breaks as a potential new tourism product for the Cotswolds which was supported by local tourism businesses and through the visitor research. This should be developed as part of the project.

The Board should therefore seek to work with accommodation providers and rural skills training providers to develop new product ideas that are built around an enhanced rural skills programme, offering a range of conservation activity holidays, short breaks and taster days. Potential links should also be explored with the British Trust for Conservation Volunteers and the National Trust which run conservation holidays based around a range of countryside skills such as dry-stone walling and hedgelaying which could be developed during the off-peak seasons between October and March.

b) Ensure that any new tourism development is effectively and appropriately controlled.

The Charter requires there to be an effective process in place for ensuring the quality of the environment of the protected area with regard to tourism development.

The Board works closely with local authorities to ensure that development control policies and processes maintain the quality of landscape and biodiversity. The Cotswolds AONB Management Plan and the Board's range of Position Statements also play an important role in helping to influence local planning decisions. The Board needs to continue to work with planning authorities and developers where appropriate to ensure that new tourism development is controlled.

c) Build on the experience of the Cotswolds Green Tourism Project in West Oxfordshire by working with tourism authorities and businesses to develop other visitor payback initiatives in the AONB

Visitors are becoming increasingly aware of the environmental impacts of their holidays and are becoming more accustomed to the idea of 'offsetting' that cost. Visitor payback schemes are now more commonplace and take many different forms – from simple collection boxes at visitor attractions to fully integrated 'opt-out' schemes where visitors to the area are asked to donate a small sum which is added to their accommodation bill and subsequently invested in local conservation and landscape enhancement projects.

The Cotswolds Green Tourism Project has provided some good experience and learning points regarding setting up a visitor payback scheme in the Cotswolds. There should be an effort to build on this experience and look at developing a wider visitor payback scheme or initiative. One future opportunity lies with the potential development of a wildlife corridor along the Cotswolds

escarpment, linking in to a wider ecological network to help wildlife adapt to climate change. Part of the project includes the consideration of a visitor payback scheme connecting businesses along the corridor.

This could include working with the charity Friends of the Cotswolds on the development of a scheme to help raise funds which could go towards the Friends' conservation work within the AONB.

A local offsetting scheme could also be investigated whereby travel to other areas is offset through a local scheme which supports local community environmental initiatives.

d) Encourage farm activity visits and stays, linking tourism with the Higher Level Stewardship education access options where possible.

Farmland is a major feature of the Cotswolds landscape. Increasingly, many farms are diversifying into tourism with the result that a number of working farms in the Cotswolds offer accommodation, often through the Farm Stay UK and Stay on a Farm schemes. Farm owners have an in-depth knowledge and understanding of the countryside that can help visitors experience a true taste of country life. There are sometimes opportunities for visitors to help out on the farm.

The opportunity of staying on a working farm and taking part in farm activities can have wide appeal for urban dwellers wishing to experience an authentic rural break and gain a greater appreciation of the Cotswolds.

Many farms in the Cotswolds are under Environmental Stewardship which is an agri-environment scheme to encourage the delivery of effective environmental management on farmed land. One of the objectives of this scheme is to promote public access and understanding of the countryside, which offers many opportunities to encourage educational visits by schools and special interest groups. This is a good way of helping to raise awareness and understanding of the AONB among the local community as well as visitors to the Cotswolds. The Board should therefore seek to encourage such visits through its promotion of Environmental Stewardship.

e) Develop and promote local produce initiatives in the Cotswolds linking up with regional organisations and projects where possible.

Quality, locally sourced produce helps to enhance the distinctiveness of a destination. The Cotswolds offers a wide range of quality food and drink producers and retailers, with many tourism establishments actively sourcing and promoting local produce in their menus. Greater use and promotion of local produce should be encouraged to help raise awareness of the link between local produce and the management of the landscape. The Cotswolds AONB website is well-placed to promote the vast range of opportunities for visitors to buy local produce including farmers' markets, farm shops and speciality shops, as well as highlighting specific produce from the Cotswolds.

There is also a variety of quality, locally made art and crafts in the Cotswolds, the improved promotion of which can help enhance local distinctiveness.

The Cotswolds AONB was one of two pilot areas for a study to develop an environmental quality brand in a protected landscape²⁷. 'Cotswolds Choice' was well supported by the farming community and local producers and tested on local farms/estates. Although funding wasn't available at the time to implement the Cotswolds Choice scheme, there is still scope to develop this further if funding can be sought, building on the strong support that the scheme initially achieved.

3. To encourage a wider understanding and appreciation of the Cotswolds' natural, historic and cultural heritage.

Action areas:

a) Build on recent educational initiatives between the voluntary wardens, Cotswold Way, local schools and youth groups to increase understanding of the natural heritage of the Cotswolds.

The education projects recently undertaken by the voluntary wardens and Cotswold Way staff have achieved a great deal of success locally and are an excellent way of building awareness of the AONB among local people. There is scope to build on this work to include a larger number of schools across the AONB, and further afield, as well as incorporating many of the initiatives into activities specifically aimed at visiting families.

b) Improve the interpretation element of walking routes and cycle rides to raise awareness of the specific historical and natural features of those areas.

Walking and cycling appeals to a very broad market and is one of the top products for visitors. There is a range of information on walking and cycling in the Cotswolds, much of which is downloadable. This could be used to help interpret the AONB and its special qualities, as well as provide functional directions and route information.

Action should therefore include a review of all walking and cycling route information to achieve, where appropriate, much greater interpretation of the local landscape, natural history and culture.

c) Develop the promotion and use of the new 'Escape to the Cotswolds' discovery centre for the AONB and encourage new events and walking routes to take place at the centre.

The 'Escape to the Cotswolds' discovery centre provides an excellent new opportunity to provide information about the AONB to visitors. However as a new facility it should be further promoted to encourage more visitors through the door. Action should include encouraging more guided walks to start from the centre, as well as self-guided walks and cycle routes. Events centred on rural skills, country crafts and local produce could also be encouraged to take place at the centre.

²⁷ A Cotswolds Choice

d) Maximise the use of new IT opportunities to develop a range of downloadable guides.

Podcasts and audio guides are an excellent way of enhancing the visitor experience and helping to interpret the area's cultural heritage.

The voluntary wardens who lead guided walks have a wealth of information and could therefore be invited to create a series of audio guides to help visitors discover other parts of the AONB. Audio guides could be developed along themes such as heritage trails, nature and wildlife, historic towns and villages.

iPhone Applications are becoming hugely popular and there are thousands of applications available in a vast range of subjects. Although quite costly to produce, potential Cotswolds Apps as joint initiatives with other organisations should be investigated eg healthy walks in the Cotswolds with the NHS and local authorities, nature walks with wildlife trusts, etc.

e) Strengthen links between the AONB and the gateway towns and cities in partnership with the local authorities.

Visitors approach the Cotswolds from many different directions and the gateway towns and cities, such as Bath, Oxford, Cheltenham and Stratford-upon-Avon, are well placed to target visitors on entry into the AONB.

However, there is little knowledge about the flow of visitors to and around the Cotswolds and therefore action should include undertaking a comprehensive visitor survey to improve understanding of visitor flows. This is also highlighted below in Objective 6.

Other actions should include:

- developing partnerships with visitor information centres in the gateways;
- raising the profile and availability of information about the Cotswolds within each centre; and
- identifying opportunities for interpretive facilities within the gateways.

The new discovery centre could develop a role as a hub for the AONB to feed information to Tourist Information Centres and information points in neighbouring towns and cities.

f) Support the promotion of events in the AONB which celebrate and raise awareness of the heritage of the Cotswolds.

Heritage is an important part of the visitor experience in the Cotswolds and one which has the potential to attract new visitors to the area as well as involve local communities in terms of both the organisation and participation of heritage-related events.

Heritage Open Days is a popular 4-day national event which takes place nationally and is co-ordinated by English Heritage. Many historic properties in the Cotswolds are open as part of this event, along with specially organised events including guided walks and talks.

A new Cotswold Churches Festival is taking place in May 2011 to celebrate the beauty of the 800+ churches throughout the Cotswolds. Churches are popular visitor attractions, especially in the Cotswolds, therefore it is hoped that this will become an annual event.

4. To work with tourism businesses to develop and promote new product ideas based around the special qualities of the Cotswolds AONB and aimed at encouraging longer stays and quality visitor experiences.

The consultation generated support for the idea of the development of specific product packages that link the special features of the Cotswolds with accommodation, activities and attractions and are targeted at appropriate markets.

There has already been initial work carried out to research potential product areas for the Cotswolds as part of the SEPL project, and this has potential to expand the concept across the wider Cotswolds area.

New products should be developed to help promote the Cotswolds as a place to enjoy peaceful relaxation in beautiful surroundings; a chance to get back to nature and escape from the routine of everyday life.

Day visitors will always be an important and dominant sector of the market. The key issues to be addressed include finding ways to encourage day visitors to stay longer, spend more, be less reliant on the private car, understand the values of the Cotswolds and convert to overnight stays.

The quality of the visitor experience is essential to the continued success of the destination and is an important principle of the European Charter. The consultation in the South West about priorities for tourism confirmed that the industry regards visitor satisfaction as an overriding priority. The most important factors for the quality of the experience, in order of importance are:

- visitor accommodation;
- customer service;
- things to see and do;
- the natural and historic environment;
- food and drink; and
- public realm.²⁸

Although the quality of the tourism product in the Cotswolds has not been raised as an issue among the research or consultation, a study into visitor expectations and satisfaction should be undertaken to establish current baselines, monitor future performance and improve the visitor experience. This links with Objectives 5 and 7 below.

²⁸ Principles for Success. Guidance for tourism transition in the South West, 2010.

Action areas:

- a) Build on the 'Cotswolds Green Tourism Weekends' concept by developing new Cotswold-wide itineraries based around sustainable tourism/environmental ideas as part of the SEPL project.
- b) Maximise the value of day visitors through a range of specifically targeted activities, events and itineraries designed to encourage longer and overnight stays.
- c) Conduct research into visitor expectations and satisfaction levels to establish current baselines and monitor future performance.
- d) Develop the guided walks programme to target day visitors and inform them of the special qualities of the Cotswolds.
- e) Create itinerary and new product ideas for day visits and short breaks based on the discovery of:
 - Wildlife and nature
 - Geology
 - Heritage and culture
 - Local food and drink
 - Arts and crafts
 - Health and well-being

5. To actively support and encourage tourism businesses to develop and promote environmentally sound and sustainable practices to improve their competitiveness and the quality of tourism offered, and act as ambassadors for the AONB.

The survey of businesses, although low in response rate, indicated strong support for participating in a range of environmentally sound initiatives. Other local research highlights the increasing importance placed on businesses which promote themselves on their environmental credentials, by visitors seeking accommodation and activities during their stay.

This should be developed further to a) encourage more businesses to adopt more sustainable practices and b) encourage the green businesses to act as champions or ambassadors for the AONB. Close working between the tourism authorities and the Board will be required to ensure a joined-up approach with regard to working with businesses.

Another important consideration for developing a sustainable tourism industry, and one which is highlighted in the European Charter, is encouraging the employment of local people in tourism. While the research didn't raise any specific issues relating to this, more could be done to raise

awareness of the opportunities associated with working in tourism in the Cotswolds and becoming more actively involved in the local tourism industry. The Cotswold Voluntary Wardens come into contact with the tourism industry in a variety of ways, eg through leading guided walks, improving access, attending shows and giving talks. There is scope to encourage this further through linking wardens' walks and talks with local accommodation providers.

Participation by businesses in National Quality Assessment Schemes (eg 'star' ratings) is an effective way of monitoring and improving the quality of visitor facilities and services. Businesses should be encouraged to participate in such schemes and monitored regularly.

Action areas

- a) Develop a new local Cotswolds green scheme/network for businesses to participate as a way of encouraging businesses to take that first sustainable step and network with other like-minded businesses.
- b) Actively support and encourage businesses to develop greener ways of doing business and support national green accreditation schemes eg Green Tourism Business Scheme, Walkers are Welcome.
- c) Encourage participation by businesses in National Quality Assessment Schemes
- d) Ensure businesses and staff have a strong knowledge and understanding of sustainability issues, the work of the voluntary wardens and the AONB through awareness days, training, events and promotional materials for businesses.
- e) Co-ordinate an annual sustainable tourism forum for the Cotswolds, sharing ideas, interests and networking.
- f) Encourage businesses to improve their impact and resilience to increased energy costs by promoting national and local initiatives related to energy efficiency and micro-generation (eg RELACS, Feed in Tariff, Renewable Heat Incentive, Green Deal).

6. To improve the understanding and management of visitor flows, both geographically and seasonally, to ensure that tourism maintains the quality of life of local residents in the Cotswolds and makes a positive contribution to the local economy.

There is very little information about actual visitor flows around the Cotswolds including entry and exit points and the links between the AONB and gateway towns and cities. Therefore to inform any detailed planning regarding visitor management, there needs to be a greater understanding about current visitor flows which could help inform the development of a visitor management plan. The Audit of Public Transport report, for visitors to and within the Cotswolds AONB, highlights the potential of gateway towns and cities for visitors into the AONB, plus hub places for visitors to stay without a car.

The consultation workshops identified a broad agreement to try and disperse visitors and spread the benefits of visitor spend to less known areas, thereby relieving some of the pressure on the honeypot areas. This was reinforced by the survey of local residents.

The survey among businesses and the individual consultation meetings identified the Cotswolds as having a relatively 'flat' season year-round which is not subject to stark peaks and troughs, although November through to February is considered a quieter period with some businesses closing during this time. Furthermore, there are some concerns, particularly by local residents and some businesses over the need to do more to encourage a greater year-round spread including increasing mid-week business.

The Cotswolds is a large area and there are many differences between the various parts of the Cotswolds. The south Cotswolds is quieter than the north Cotswolds which tends to attract the majority of visitors to its honeypot areas. Visitors should be encouraged to explore and return to visit new, different parts of the Cotswolds, particularly to highlight the distinctive features and attractions of other areas eg the industrial heritage of the Stroud Valleys.

Action areas

- a) Undertake a Cotswolds-wide visitor survey, including gateway towns, to gain a better understanding of visitors and visitor flows through the Cotswolds and inform future visitor management planning.
- b) Improve the promotion of public transport services and networks to and around the AONB:
 - Strengthen the design and distribution of the 'Explore' guides.
 - Develop and promote more car-free itineraries including best journeys around the Cotswolds and the promotion of ideal places to stay without a car.
 - Work with transport operators to develop integrated ticketing options eg a Cotswolds Rover bus/train pass with additional option of including entry into attractions.
 - Encourage businesses and tourism authorities to promote public transport options and incentivise car-free travel, through familiarisation and awareness days to improve knowledge.
 - Renew and promote the range of 'Explorer Walks' which link to public transport, and develop new walking and cycle routes from railway stations
 - Encourage the development of shuttle buses between centres of accommodation and rail stations
- c) Work with accommodation providers to encourage visitors to explore the area around their accommodation and minimise car travel while in the area.

- d) Support parish councils in the development of sustainable tourism activities as part of their parish plans.
- e) Celebrate and promote local distinctiveness:
 - Support willing local communities to encourage tourism through local distinctiveness initiatives.
 - Build on local 'residents' weeks' to develop a Cotswolds-wide residents' week. This will also help to enhance the important 'Visiting Friends and Relatives' (VFR) market by reinforcing the range of attractions and activities to local people.
 - Use the Cotswold Lion newspaper, tourism authority websites, tourism newsletters and other tourism publicity materials to celebrate local 'outstanding' people.
- f) Encourage off-peak and weekday visits to support a year-long destination:
 - Ensure tourism businesses have regular information about walks, events and festivals throughout the year on which they can create targeted promotions.
 - Encourage off-peak tourism based around seasonal products eg seasonal trails and produce, nature calendar, wet weather ideas.
- g) Provide appropriate information to coach and tour operators regarding parking and facilities in key town centres. Look into the possibility of using appropriate local farmers' fields as part of a park and ride scheme.
- h) Consider a local PR campaign to help inform local communities about the benefits of tourism, celebrating local success stories where possible.

7. To encourage wider access, exploration and quality provision to attract all people.

The majority of visitors to the Cotswolds come here to enjoy the quality landscape, opportunities for peace and relaxation and the chance to get away from it all. An infrastructure is already available for walking, cycling, riding and general outdoors recreation. This makes the Cotswolds the perfect place to encourage more people from outside the AONB to enjoy the many benefits of the countryside. The consultation exercises identified the need to encourage access to the Cotswolds from different sectors of society and not see it just as a place for the well-off.

National and regional policies emphasise the need for social inclusion as a key principle of sustainable development. Research undertaken by Natural England and Visit England, into who accesses the natural environment, highlights the lack of:

- people from ethnic and minority backgrounds;
- young people and people with disabilities.

A lot of work has already been undertaken by the Cotswolds Conservation Board to encourage under-represented and disadvantaged visitors into the AONB. This includes development of a project (My Countryside) aimed at helping people overcome the barriers that prevent them from enjoying the natural world; and encouraging visitors with disabilities through the creation of new products such as 'Walks on Wheels' and 'Miles without Stiles' by the voluntary wardens. People with accessibility needs represent a growth sector of the market and there is an opportunity for the Cotswolds to maximise this opportunity and satisfy these growing needs.

Tourism in the Cotswolds should therefore be socially inclusive, encouraging access by all people. Targeting these groups can provide both economic and social benefits. The Cotswolds is well placed to offer a range of quality countryside experiences to people with physical and mental disabilities, as well as people from disadvantaged areas, young people and people from ethnic and minority backgrounds. As well as enjoying and exploring the landscape of the Cotswolds, there are many opportunities for people to enjoy watching wildlife and nature. Many wildlife trusts across the Cotswolds manage reserves that are accessible and can be explored on foot, such as Daneway Banks in Gloucestershire where the rare Large Blue butterfly can be seen in summer, and Foxholes Nature Reserve in Oxfordshire famed for its bluebells and abundant bird life.

Action areas

- a) Promote the Cotswolds as a leading destination for walking and outdoor recreation:
 - Develop and promote the extensive recreational and public rights of way network, linking existing and new routes together across the area and developing associated infrastructure.
 - Encourage and support more towns to achieve Walkers are Welcome status.
 - Encourage the development of a Cotswolds-wide walking festival, linking related smaller events and facilities together to achieve maximum benefit.
 - Continue to improve the guided walks programme and the range of self-guided walks to attract a wider range of people.
 - Develop and promote more cycling routes including off-road routes.
 - Develop and promote a range of self-guided family-friendly walks.
 - Build on 'Walks on Wheels' including linking accessible countryside with accessible accommodation and attractions to create 'access for all' packages.
 - Build on opportunities with the Cotswold Way to access other areas of the AONB and sites of interest eg geology trails, expansion of circular walks.
 - Enhance the promotion of riding routes

- Promote the many accessible nature reserves across the Cotswolds as opportunities to view nature and wildlife.
- b) Identify and promote opportunities for more low-cost accommodation:
- Encourage more farms to diversify by offering camping and bunk-barn facilities.
 - Encourage the development of camping facilities and low-cost accommodation options at other sites.
 - Enhance the promotion of existing campsites, youth hostels and bunk-barns.
- c) Improve the promotion of local public transport (link with Objective 6).

IMPLEMENTATION AND RESOURCES TO DELIVER THE PLAN

Implementation - the need for a coordinating body

The following points highlight the main reasons why there needs to be a body that coordinates the development, management and promotion of sustainable tourism in the Cotswolds:

- The Cotswolds is a large and administratively complex area with many local authorities.
- There is no formal network of communication between the many tourism businesses across the area.
- Partnership working is the key to the success of this strategy. Therefore there should be an effective working relationship between the Cotswolds Conservation Board and the tourism authorities and other stakeholders, including volunteers, to ensure successful delivery of the plan.
- Future budgets and funding streams are uncertain. Therefore it is particularly important to look at ways of pooling resources and sharing responsibilities.
- There needs to be an effective method of communicating with other conservation, environmental and community bodies, plus commercial organisations.
- A permanent forum or equivalent is a key requirement of the European Charter.

The Cotswolds AONB Sustainable Tourism Partnership is a good start to bringing tourism authorities across the Cotswolds together and includes private sector and local community representation. This partnership is best placed to act as the co-ordinating body for the sustainable tourism strategy and action plan. However it needs to be strengthened and developed further to bring in additional representation from private, community and environmental sectors from across the Cotswolds.

A wider, more open structure that brings together all stakeholders with an interest in tourism in the Cotswolds would be very beneficial. This could take the form of an active network which comes together in an annual forum of sustainable tourism interests. It could be supported through a regular newsletter, online forum, training/awareness events and other forms of appropriate communication.

Resources

Many aspects of the action plan can be implemented using existing current resources. However, there is a great deal of uncertainty at present about the future availability of public sector funding and private sector financing for tourism related activities.

There will be an ongoing need to monitor this situation closely and continue to identify potential sources of external funding for project areas. The current situation also provides an opportunity to rethink how tourism-related organisations can best deliver services for the customer, making most effective use of limited resources and avoiding duplication.

There is also a clear requirement for a sustainable tourism officer post working across the Cotswolds, possibly based within the Board's team. This person would work closely with the tourism authorities and help to advocate, promote, encourage and implement sustainable tourism activities.

The Board coordinates a Sustainable Development Fund of £40,000 per year, which provides grants to local communities, individuals and businesses for projects and initiatives which help to conserve and enhance the Cotswolds AONB. The fund has a particular focus on the environment, community and local economy and can include sustainable tourism projects.

The South East Protected Landscapes project 'Sustainable Tourism in our Finest Landscapes', has secured total funding of £900,000 towards the delivery of this project over 3 years. This equates to an estimated £100,000 for the Cotswolds which will help to develop and market new tourism products based on the special features of the Cotswolds AONB.

Warwickshire County Council has been awarded funding of £150,000 by the Rural Development Programme for England for a 'Welcome to the Countryside' project. The project is aimed at developing, coordinating and delivering a focused rural tourism marketing and product development programme, which will benefit tourism businesses operating within rural Warwickshire. The main pillars of the funding will support the development of food and drink, green/sustainable tourism, festivals and events and e-tourism across Warwickshire, including the South Warwickshire part of the AONB.

ACTION PLAN

The following table summarises the details of the action plan and relates to the seven strategic objectives, linking with the principles of the European Charter as previously indicated.

The action plan includes lead partners, resources required, expected outputs/targets, monitoring methods, as well as the level of priority for each action:

- HIGH = should be undertaken in years 1-2
- MEDIUM = should be undertaken in years 3-5.

Abbreviations used in the plan:

BHS	British Horse Society
CCB	Cotswolds Conservation Board
CFDT	Cotswolds & Forest of Dean Tourism
CF	Cotswolds Farmstay
CSTP	Cotswolds Sustainable Tourism Partnership
CSW	Climate South West
DMO	Destination Management Organisations (also including district and county council tourism services)
DRA	Disabled Ramblers Association
EA	Environment Agency
FOTC	Friends of the Cotswolds
FWAG	Farming & Wildlife Advisory Group
LA	Local Authority
NE	Natural England
NT	National Trust
PC	Parish Council
RCC	Rural Communities Council
SEPL	South East Protected Landscapes
SWEA	Severn Wye Energy Agency
UoG	University of Gloucestershire
VE	Visit England
WCC	Warwickshire County Council
WODC	West Oxfordshire District Council
WT	Wildlife Trusts

Action	Priority	Lead agencies	Resource implications	Outputs/targets/ indicators	Monitoring methods
1.To strengthen the identity and raise awareness of the Cotswolds as a sustainable destination, recognising its special qualities and designation as an AONB.					
a) Maximise the promotion of the AONB through online, print and PR materials as appropriate	HIGH	CCB	£10k for website improvements including new site for rural courses and events & outdoors recreation. £5k for new AONB visitor map and guide. Staff time	Increase in visits to current AONB site. New website for rural courses and AONB-wide events. Increase in number of events featured on site. Increase in take-up of courses. Minimum 20k copies of map and guide printed and distributed. Increase in downloads. Increase in awareness of the AONB.	Visitor survey Website and online monitoring in terms of usage, downloads. Tourism business surveys Monitoring through DMOs
b) Develop a strategic approach for promoting the whole of the Cotswolds as a sustainable destination	MED	DMOs CCB	Staff time	Increase in cross-border working. Greater recognition among visitors of the Cotswolds as a sustainable destination. Increase in use of recycled/sustainable sources of materials.	
c) Develop and promote a Cotswolds AONB toolkit for tourism authorities and businesses to use, which promotes a consistent message, clarifies the identity and distinctiveness of the AONB and helps to develop more sustainable tourism.	MED	CCB	£2k development costs plus staff time.	Number of businesses using the toolkit.	

d) Work with businesses and tourism authorities to encourage visitors to reduce the impact of their visit, while enhancing their experience of the Cotswolds.	HIGH	CFDT WODC CCB Private sector	£1k reprint costs.	Number of businesses displaying 'green' cards. Increase in awareness of 'green' issues among visitors.	
e) Build on existing signage and develop new signage opportunities to increase awareness of the geographical area of the AONB.	MED	CDC CCB	£5k Staff time	Updated information on existing information/ interpretation boards. Increase in AONB information at town entry points. Increased awareness of the AONB.	
2. To maintain a high-quality environment and develop initiatives whereby tourism can contribute to the conservation and enhancement of the Cotswolds landscape and environment.					
a) Develop a range of conservation holidays and short breaks by building on the rural skills programme to enhance the range of courses and include accommodation.	HIGH	CCB/ SEPL Private sector	£100k is secured from the SEPL project. Staff time	Number of new tourism products created.	State of the Cotswolds Reporting on landscape and biodiversity
b) Ensure that any new tourism development is effectively and appropriately controlled	HIGH	CCB LAs	Staff time	New tourism developments are appropriately developed and sited.	Visitor survey Voluntary wardens reports
c) Build on the experience of the Cotswolds Green Tourism Project in West Oxfordshire by working with tourism authorities and businesses to develop other visitor payback initiatives in the AONB.	MED	CCB DMOs Private sector CSTP FOTC	Estimated £2k costs required for initial promotion. Staff time	One new visitor payback initiative developed. Increase in amount of visitor contributions towards conservation/carbon offsetting programmes.	Monitoring through rural skills programme
d) Encourage farm activity visits and stays, linking tourism with the Higher Level Stewardship education access options where possible.	MED	CCB FWAG CF NE	Staff time	Increase in visitors staying on farms.	Monitoring through Cotswolds Farmstay

e) Develop and promote local produce initiatives in the Cotswolds, linking up with regional organizations and projects where possible.	MED	CFDT WCC WODC CCB	Resources allocated within existing budgets. Additional resources required to develop Cotswolds Choice. Staff time	Increase in information on local produce online. Increase in number of businesses sourcing local produce. Increase in purchase of local produce by visitors. Establishment of Cotswolds Choice products	Tourism business surveys
3. To encourage a wider understanding and appreciation of the Cotswolds' natural, historic and cultural heritage.					
a) Build on recent educational initiatives between the voluntary wardens, Cotswold Way, local schools and youth groups to increase understanding of the natural heritage of the Cotswolds	HIGH	CCB	Staff and volunteer time	Increase in number of school visits/activities with the AONB.	Voluntary wardens reports Feedback from schools
b) Improve the interpretation element of walking routes and cycle rides to raise awareness of the specific historical and natural features of those areas.	HIGH	CCB	£3k for design of new interpretive routes. Staff and volunteer time.	Increase in walking and cycling route information. Increase in downloads from website.	Website monitoring Visitor survey
c) Develop the promotion and use of the new 'Escape to the Cotswolds' discovery centre for the AONB and encourage new events and walking routes to take place at the centre.	HIGH	CCB	Staff and volunteer time	Increase in number of visitors to the centre. Increase in number of walks and events at the centre.	Monitoring of visits to 'Escape to the Cotswolds' discovery centre
d) Maximise the use of new IT opportunities to develop a range of downloadable guides.	MED	CCB DMOs CSTP	Estimated £12k for development, plus staff and volunteer time.	Number of new podcasts, audio guides and/or apps. Number of downloads.	
e) Strengthen links between the AONB and the gateway towns and cities in partnership with the local authorities (link with public transport promotion in Objective 6)	HIGH	CSTP CCB DMOs	Staff time	Range/quantity of information on AONB at gateway towns and TICs.	

f) Support the promotion of events in the AONB which celebrate and raise awareness of the heritage of the Cotswolds.	HIGH	DMOs Dioceses NT CCB	Staff time	Numbers of related events taking place Numbers of people attending events.	
4. To work with tourism businesses to develop and promote new product ideas based around the special qualities of the Cotswolds AONB and aimed at encouraging longer stays and quality visitor experiences.					
a) Build on the 'Cotswold Green Tourism Weekends' concept by developing new Cotswold-wide itineraries based around sustainable tourism/environmental ideas as part of the SEPL project.	HIGH	SEPL CCB CSTP	£100k is secured from the SEPL project. Staff time	Number of new itineraries and tourism products.	Economic impact study Monitoring through SEPL project
b) Maximise the value of day visitors through a range of specifically targeted activities, events and itineraries designed to encourage longer and overnight stays.	MED	CSTP Accommodation Sector	Staff time	Increase in staying visitors. Number of new itineraries and tourism products.	Visitor survey Tourism business survey
c) Conduct research into visitor expectations and satisfaction levels to establish current baselines and monitor future performance.	HIGH	CSTP UoG	Staff time and costs of student time	Survey undertaken and baseline data established. Greater understanding of visitors. Increase in visitor satisfaction	Voluntary wardens' reports
d) Develop the guided walks programme to target day visitors and inform them of the special qualities of the Cotswolds.	HIGH	CCB	Staff and volunteer time	Increase in number of visitors participating in guided walks.	
e) Create itinerary and new product ideas for day visits and short breaks based on the discovery of: <ul style="list-style-type: none"> • Wildlife and nature • Geology • Heritage and culture • Local food and drink • Arts and crafts • Health and well-being 	MED	CSTP DMOs Private sector	Staff time	Number of new products and itineraries.	

5. To actively support and encourage tourism businesses to develop and promote environmentally sound and sustainable practices to improve their competitiveness and the quality of tourism offered, and act as ambassadors for the AONB.					
a) Develop a new local Cotswolds green scheme/network for businesses to participate as a way of encouraging businesses to take that first sustainable step and network with other like-minded businesses.	HIGH	CSTP	Staff time	New scheme established and promoted. Number of businesses participating in the scheme.	Green Tourism Business Scheme Local Cotswolds green scheme
b) Actively support and encourage businesses to develop greener ways of doing business and support green accreditation schemes eg GTBS, Walkers are Welcome, etc.	HIGH	DMOs VE	Staff time	Increase in number of businesses participating in green accreditation schemes.	Tourism business survey VE research and monitoring
c) Encourage participation by businesses in National Quality Assessment Schemes	HIGH	DMOs	Staff time	Increase in number of businesses participating in NQAS.	Event feedback surveys
d) Ensure businesses and staff have a strong knowledge and understanding of sustainability issues, the work of the voluntary wardens and the AONB through awareness days, events and promotional materials for businesses.	HIGH	DMOs CCB CSTP	Staff time plus ad hoc venue hire/catering costs.	Number of awareness days and training events organised. Number of businesses participating.	
e) Co-ordinate an annual sustainable tourism forum for the Cotswolds for sharing ideas, interests and networking.	MED	CSTP	Staff time plus venue and catering costs.	One forum held per year. Number of businesses attending. Positive feedback received from businesses.	
f) Encourage businesses to improve their impact and resilience to increased energy costs by promoting national and local initiatives related to energy efficiency and micro-generation (e.g. RELACS, Feed in Tariff, Renewable Heat Incentive, Green Deal).	HIGH	SWEA RegenSW CCB DMOs	Staff time Promotion of relevant initiatives to businesses through existing communications. Workshop (£500)	Increase in awareness of and adaptation to climate change by businesses. Number of businesses participating in initiatives. Reduced energy consumption by businesses	

6) To improve the understanding and management of visitor flows, both geographically and seasonally, to ensure that tourism maintains the quality of life of local residents in the Cotswolds and makes a positive contribution to the local economy.					
a) Undertake a Cotswolds-wide visitor survey, including gateway towns, to gain a better understanding of visitors and visitor flows through the Cotswolds and inform future visitor management planning.	HIGH	CSTP UoG	Staff time and costs of student/university time.	Survey undertaken and baseline data established. Greater understanding of visitors and visitor flows.	Visitor survey Website use & downloads monitoring
b) Improve the promotion of public transport services and networks to and around the AONB.				Decreased car use	Local residents survey
<ul style="list-style-type: none"> Strengthen the design and distribution of the 'Explore' guides. 	MED	CCB	£25k	Increased use of public transport.	Local transport surveys
<ul style="list-style-type: none"> Develop and promote more car-free itineraries including best journeys around the Cotswolds and the promotion of ideal places to stay without a car. 	MED	DMOs	Staff time	Development of Cotswolds Rover bus/rail pass.	Monitoring of complaints received by local residents
<ul style="list-style-type: none"> Work with transport operators to develop integrated ticketing options eg a Cotswolds Rover bus/train pass with additional option of including entry into attractions. 	MED	CSTP	Staff time	Increase in public transport/walks & cycle routes.	Monitoring of visitor numbers to key sites and attractions through VE and LAs
<ul style="list-style-type: none"> Encourage businesses and tourism authorities to promote public transport options and incentivise car-free travel, through familiarisation and awareness days to improve knowledge. 	HIGH	CSTP	Staff time		Monitor through RCCs
<ul style="list-style-type: none"> Renew and promote the range of 'Explorer Walks' which link to public transport, and develop new walking and cycle routes from railway stations. 	MED	CCB	Staff and volunteer time		Tourism business survey
<ul style="list-style-type: none"> Encourage the development of shuttle buses between centres of accommodation and rail stations. 	MED	CCB	Staff and volunteer time		Press & media monitoring

c) Work with accommodation providers to encourage visitors to explore the area around their accommodation and reduce car travel while in the area.	HIGH	DMOs CSTP CCB	Staff time	Decreased use of car
d) Support parish councils in the development of sustainable tourism activities as part of their parish plans.	MED	PCs	Staff time	Increased support to parish councils. Increase in tourism activity plans in parishes.
e) Celebrate and promote local distinctiveness: <ul style="list-style-type: none"> Support willing local communities to encourage tourism through local distinctiveness initiatives. Build on local 'residents' weeks' to develop a Cotswolds-wide residents' week. This will also help to enhance the important 'VFR' market by reinforcing the range of attractions and activities to local people. Use the Cotswold Lion newspaper, destination websites, newsletters and other tourism publicity materials to celebrate and promote local 'outstanding' people 	MED MED HIGH	PCs/RCCs DMOs DMOs, CCB	Staff time Staff time Staff time	Development of Cotswolds residents' week. Number of features published of local outstanding people.
f) Encourage off-peak and weekday visits to support a year-long destination: <ul style="list-style-type: none"> Ensure tourism businesses have regular information about walks, events and festivals throughout the year on which they can create targeted promotions Encourage off-peak tourism based on seasonal products eg seasonal trails and produce, nature calendar, wet weather ideas. 	HIGH HIGH	DMOs/CCB DMOs/CCB Private sector	Staff time Staff time	Increase in visits during off-peak times.

g) Provide appropriate information to coach and tour operators regarding parking and facilities in key town centres. Look into the possibility of using appropriate local farmers' fields as part of a park and ride scheme.	HIGH	DMOs	Staff time	Improved coach parking in town centres.	
h) Consider a local PR campaign to help inform local communities about the benefits of tourism, celebrating local success stories where possible.	MED	CSTP	Estimated £5k required for securing external PR support	Media coverage secured. Increased local support for tourism.	
7. To encourage wider access, exploration and quality provision to attract all people					
<p>a) Promote the Cotswolds as a leading destination for walking and outdoor recreation:</p> <ul style="list-style-type: none"> • Develop and promote the extensive recreational and PROW network, linking existing and new routes together across the area and developing associated infrastructure. • Encourage and support more towns to achieve Walkers are Welcome status. • Encourage the development of a Cotswolds-wide walking festival, linking related smaller events and facilities together to achieve maximum benefit. • Continue to improve the guided walks programme and the range of self-guided walks to attract a wider range of people. • Develop and promote more cycling routes including off-road routes. • Develop and promote a range of 	<p>HIGH</p> <p>MED</p> <p>MED</p> <p>HIGH</p> <p>MED</p> <p>HIGH</p>	<p>CCB LAs</p> <p>DMOs/CCB</p> <p>CSTP</p> <p>CCB</p> <p>CCB/DMOs</p> <p>CCB/DMOs</p>	<p>Staff time</p> <p>Staff time</p> <p>Staff time plus associated promotional costs.</p> <p>Staff and volunteer time.</p> <p>Staff and volunteer time.</p>	<p>Greater awareness of walking routes.</p> <p>Increase in towns with 'Walkers are Welcome'. Cotswolds Walking Festival established.</p> <p>Increase in range of walks and cycle rides available.</p> <p>Increase in number of walking information downloads.</p> <p>Increase in numbers of users of the Cotswold</p>	<p>Visitor survey</p> <p>Tourism business survey</p> <p>Voluntary wardens reports</p> <p>Website usage & downloads monitoring</p>

<ul style="list-style-type: none"> self-guided family friendly walks. Build on 'Walks on Wheels' including linking accessible countryside with accessible accommodation and attractions to create 'access for all' packages. Build on opportunities with the Cotswold Way to access other areas of the AONB and sites of interest eg geology trails, expansion of circular walks. Enhance the promotion of riding routes. Encourage accommodation providers to promote local cycle hire and provide facilities for cyclists. Promote the many accessible nature reserves across the Cotswolds as opportunities to view nature and wildlife. 	HIGH	CCB/DMOs DRA	Staff and volunteer time.	Way.	
	HIGH	CCB	Staff and volunteer time.	Increase in downloads.	
	HIGH	CCB/DMOs BHS	Staff and volunteer time.	Number of businesses participating in 'Cyclists are Welcome' scheme.	
	MED	WCC	Staff time		
b) Identify and promote opportunities for more low-cost accommodation <ul style="list-style-type: none"> Encourage more farms to diversify by offering camping and bunk-barn facilities. Build on the work with National Trust and the Cotswold Way to offer camping facilities and low-cost accommodation along the trail. Enhance the promotion of existing campsites, youth hostels, bunk-barns. 	MED	CCB/DMOs Private Sector/NT	Staff time plus promotional costs from existing resources.	Increase in number of low-cost accommodation options.	
	MED				
	HIGH				
c) Improve the promotion of local public transport (link with Objective 5)	HIGH	CCB/DMOs	Staff time	Increase in use of public transport by visitors.	

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Appendix F: Walking in the Cotswolds

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- Cotswold Way Circular Walks
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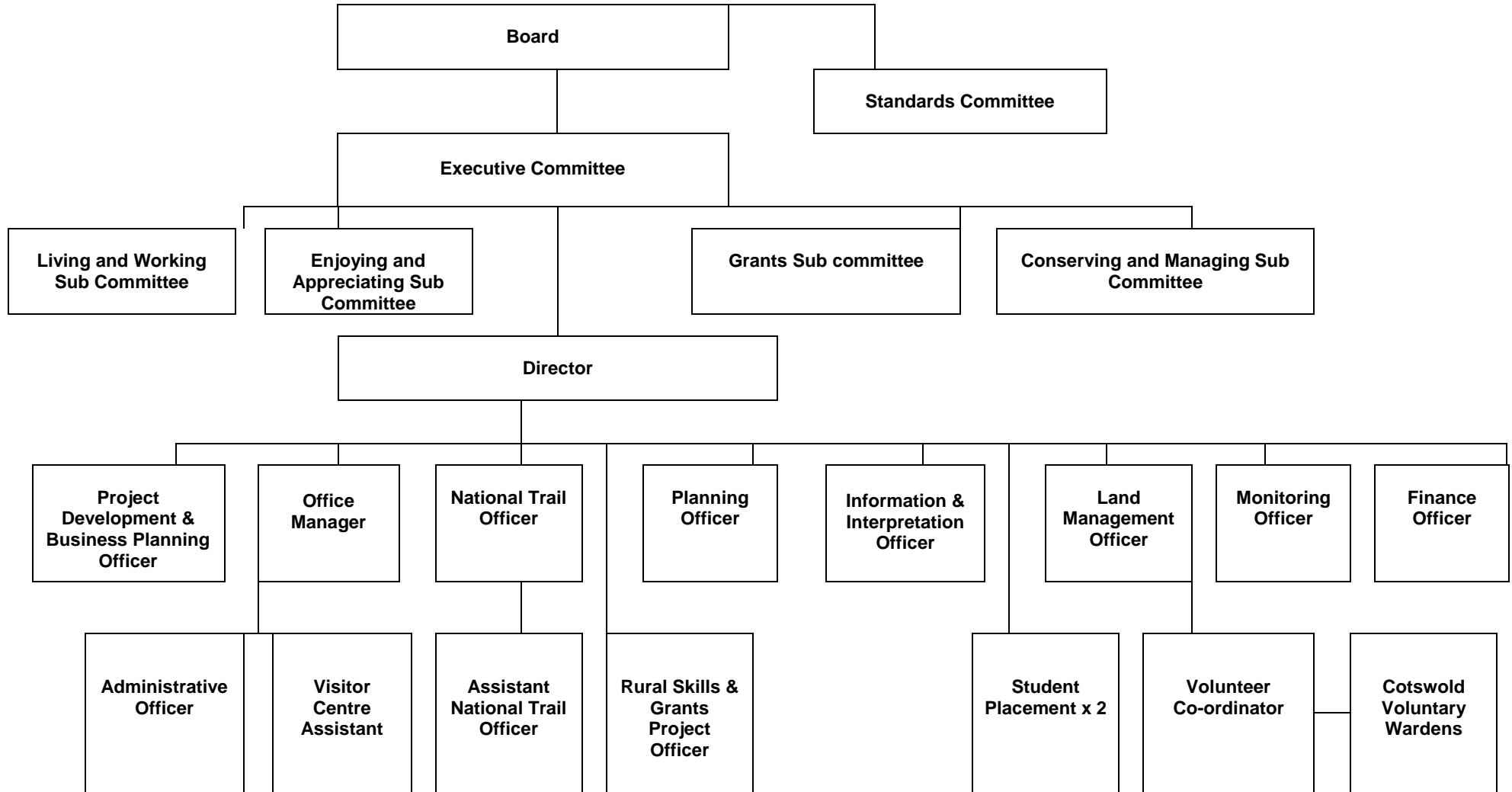
Appendix G: The ArkLeisure Visitor Segmentation Model

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COTSWOLDS CONSERVATION BOARD STRUCTURE



Appendix B

Sustainable Tourism in the Cotswolds

Cotswolds Green Tourism Project

Background

The Cotswolds Green Tourism Project was a joint initiative between the Cotswolds Conservation Board, West Oxfordshire District Council and local tourism businesses who worked in partnership to develop 'green tourism' opportunities to help make it possible for people to choose a sustainable holiday. 'Green tourism' initiatives provide a way of making tourism in the Cotswolds more sustainable, reducing its negative impacts and creating more positive impacts. 'Green tourism' can also help to improve the economic performance of tourism businesses and address the Cotswold Conservation Board objective: *to increase the understanding and enjoyment of the special qualities of the AONB, ensuring that these complement the conservation and enhancement of the area.*

The project was part financed by the Cotswolds Conservation Board, European Community West Oxfordshire Network LEADER + 2000-2006 Programme and South East England Development Agency (SEEDA).

The project focused on the following two elements:

- Green Tourism Business Scheme
- Step into the Cotswolds - Visitor Payback Scheme

Green Tourism Business Scheme

The project encouraged tourism businesses to introduce environmental management practices into the running of their businesses through participation in the Green Tourism Business Scheme (GTBS).

The GTBS is a national sustainable tourism certification scheme for the UK. Businesses opting to join the GTBS are assessed by a qualified grading advisor against a rigorous set of criteria, covering a range of areas, like energy and water efficiency, waste management, biodiversity, promoting local transport and more.

The Cotswolds Conservation Board and West Oxfordshire District Council encouraged local tourism businesses in the Area of Outstanding Natural Beauty to become members of the GTBS.



Step into the Cotswolds – Visitor Payback Scheme

Step into the Cotswolds- Visitor Payback scheme aims to increase awareness of and support for the Cotswolds AONB as a fundamental part of the tourism product, which should be conserved for, and enjoyed by, current and future generations.



The project set out to do this by:

- bringing together all those involved with tourism in the West Oxfordshire part of the Cotswolds AONB
- raising awareness of the special qualities of the landscape
- stimulating businesses and visitors to raise funds to support the environment
- working with the local community to deliver projects which will help conserve the AONB
- helping to bring financial gain to the AONB by supporting local businesses.

What is a visitor payback scheme?

'.....visitor payback schemes ... convert the emotive value that a visitor places on the destination into a financial value, manifested in a donation. This donation is then ringfenced for a project protecting the destination assets that the visitor was moved by. Visitor payback is therefore about making connections. Connecting those charged with conserving the features attracting visitors to the visitors who enjoy them.'

The feature that makes Visitor Payback distinct from other methods of raising donations for conservation work is that there is a greater involvement of tourism businesses as part of the chain of connections. In taking this approach, Visitor payback schemes attempt to draw on the fact that tourism businesses both rely on the environment as one of their chief resources and possess unique opportunities in terms of their level of contact with visitors.

Neil Warren, 2002. ¹

What did the project achieve?

- Fourteen tourism businesses were awarded with GTBS accreditation
- Ten tourism businesses helped to collect voluntary visitor contributions.
- Over £6,000 of funds was generated through the scheme.
- Six new 'Step into the Cotswolds' stile-free, circular walks were created with funds generated through the Visitor Payback Scheme.
- A number of green tourism workshops and advisory sessions, including a local food workshop were organised and attended by tourism businesses in the AONB.
- A successful pilot project in one area of the AONB with potential to roll out to the rest of the Cotswolds area.

¹ What is a Visitor Payback Scheme, Neil Warren. Visitor Payback Schemes. Workshop Proceedings, page 4. CRN Countryside Recreation Network, 2002

Explore the Cotswolds by Public Transport



For over a decade, the Cotswolds Conservation Board has produced an annual Explore the Cotswolds by Public Transport guide with an accompanying set of timetables updated twice a year.

The guide and timetables are designed to promote sustainable transport options for visitors and the local community, using the network of trains and rural buses that serves most of the Cotswolds throughout the year.

The four timetable booklets that accompany the guide cover the northern, central and southern parts of the Cotswolds and the Cotswold Way National Trail.

The guide lists a range of places to see including attractions, towns and villages, plus it offers a number of 'taster days out' by cycle, on foot or by bus.

Forty seven thousand copies are distributed to tourist information centres, attractions, visitor centres, libraries and other public places.

Feedback from users of the guides is very positive and demand is high as they are the only public transport guides that cover the whole of the AONB, therefore making it much easier to get around without the need of a car.

A Green Weekend in The Cotswolds stroud district

AT A GLANCE :

- Leave your car at home
- Stay in a country cottage
- Have your breakfast delivered by donkey
- Visit Stroud's famous Farmers' Market
- Explore the autumn colours of the Golden Valley
- Green Tourism Business Scheme – silver rating

3 nights in a cottage from **£156** per couple (excluding food & transportation)

Book with Westley Farm:
Tel. 01285 760262 or email
cottages@westleyfarm.co.uk

www.westleyfarm.co.uk



Itinerary 1: Chalford and Stroud

Friday Afternoon: Arrive at Stroud Train Station. You will be picked up and transferred to Westley Farm, near the pretty village of Chalford. Five Cotswold stone cottages are scattered across a traditional hill farm and sleep between two and six people. Check-in to your cosy cottage for three nights and enjoy a pre-arranged home-cooked dinner.

Saturday Morning: Hop on a bus to visit Stroud's famous Saturday morning Farmers' Market. Alternatively, wait for the Chalford donkey to deliver your breakfast items from the local village store (pre-ordering essential). If you are feeling really adventurous, why not take to the skies with the Cotswold Gliding Club (pre-booking essential) at Aston Down Airfield?

Saturday Afternoon: For the energetic walker, take the 6km route to Minchinhampton Common. If you prefer to cycle the lanes, pre-hire bikes from Noah's Ark, which will be delivered directly to your cottage. The Common is an important archaeological landscape. It is also home to grazing cattle, wild orchids and rare butterflies. Horse-riding is available nearby. Your hosts will be happy to recommend great walks, cycle routes and a local pub for dinner.

On the farm, you may wish to head out on an owl prowl, learn the ancient art of coppicing. There may even be the opportunity to press your own Westley Farm apple juice at a local orchard.

Sunday: From your cottage, don't forget to keep an eye out for the occasional visiting deer, fox or badger. Enjoy a day of walking or cycling along the Golden Valley of the River Frome to Sapperton. This village is known for its connections to the Cotswolds Arts & Crafts movement and 'the Sapperton Tunnel', which is an historic remnant of the canal's industrial past. Stop for lunch and sample some local ales at a lovely country pub. Enjoy your last evening in the cottage and snuggle up in front of your log fire.

Monday Morning: You will be transferred to Stroud Train Station for your journey home.



Cotswold Day Tours...

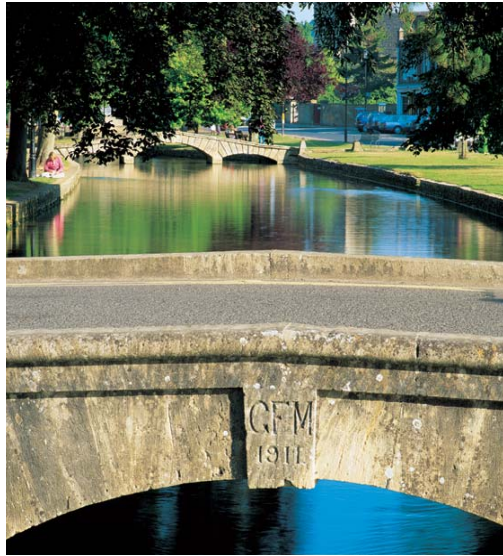
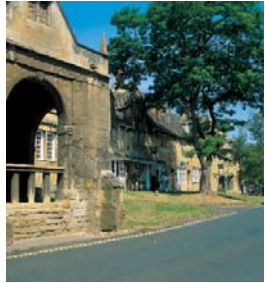
... Discover the Cotswolds by **Public Transport**



car free
Cotswolds

Cotswold Day Tours...

...by Public Transport



These tours provide an opportunity to visit some of the best small towns and villages of the north and south Cotswolds, using local bus services. The Cotswold Hills are a designated Area of Outstanding Natural Beauty, combining bustling market towns and timeless, hidden hamlets with spectacular countryside – and from a bus so much more can be seen over the hedgerows!

If you have only one day to spare, then we suggest you take the northern route which allows you to explore three of the Cotswolds' must-see villages. Travelling north from Cheltenham, the route passes through the ancient borough of **Winchcombe** and on to the well-known village of **Broadway** – with time to explore! From there it continues to the historic wool town of **Chipping Campden** where there will also be free time, and returns to Cheltenham via **Moreton-in-Marsh**, **Stow-on-the-Wold** and **Bourton-on-the-Water** – places as picturesque as their names suggest. There will be another short break in Bourton.

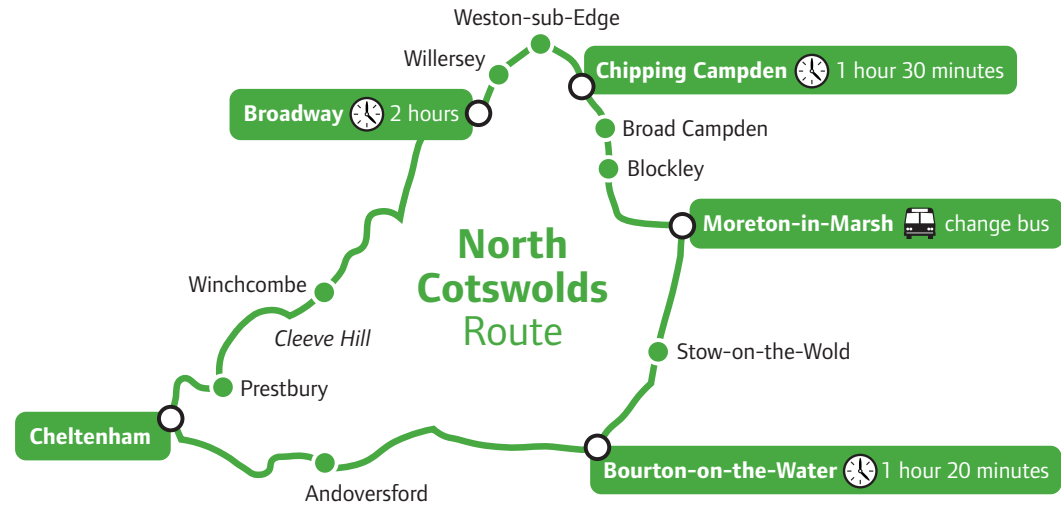
The southern route is designed for visitors to see some of the less well-known – but no less

attractive – countryside of the south Cotswolds. From Cheltenham the road runs south to the first stop in the small, quintessentially pretty town of **Painswick** and then continues along dramatic river valleys to **Stroud** – formerly a major centre of the Cotswold wool industry. The route climbs over Rodborough and Minchinhampton Commons before reaching **Cirencester** with its impressive 'wool' church set in a medieval market square; you can make an extended stay here before returning to Cheltenham.

If time is limited, this is the optimum way to discover the very best of the Cotswolds in just one day. If you have longer, it could be the starting point for further explorations...

The timetables which accompany this brochure have been very specifically planned to take advantage of limited bus services, so we do advise you to keep **strictly** to the suggested timings if you wish to follow the whole route – and return to Cheltenham the same day!

NORTH COTSWOLDS TOUR



Time period at destination

Change bus at destination

Cheltenham to Broadway

Bus service 606 Royal Well bus station

Travelling north east out of Cheltenham, the first place of interest is the little village of **Prestbury**, close to the racecourse and virtually merging with the edge of Cheltenham but retaining its own distinctive character.

Apart from its proximity to the famous racecourse, officially known as Prestbury Park, the village's chief claim to fame is as one of the most haunted places in England. Ghostly horsemen, both with and without their heads, gallop through the ancient streets, and spectral figures in various shades of black, white and grey are rumoured to appear and disappear at several locations around the village!

Leaving the supernatural behind, the bus heads out of the village towards the heights of **Cleeve Hill**. The main road skirts round the village of Southam at the foot of the hill and then starts to climb steadily. The summit of Cleeve Hill, known as Cleeve Cloud, is the highest point of the Cotswold range at 330 metres (1083 feet) above sea level, and is notable for superb panoramic views to the west – weather permitting.

On a clear day it is possible to see across the Severn Vale to the Malvern Hills, Forest of Dean and further still to the Black Mountains in South Wales. Once over the hill, the road descends quite rapidly towards the little town of Winchcombe.

TOURIST INFORMATION CENTRE

Cheltenham
77 Promenade
Cheltenham GL50 1PJ
Tel: 01242 522878

The name **Winchcombe** literally means ‘curved valley’ – note the long, curved road into the town, edged with honey-coloured stone cottages. The impressive church of St Peter, on the left before the centre, was founded in the 15th century when Winchcombe’s wool industry was at its most prosperous, and is particularly noted for its gargoyles, rumoured to have been modelled on local townfolk. On the right, just beyond the church, is Vineyard Street, which leads up to Sudeley Castle, the most notable building in the town but unfortunately not visible from the road. Sudeley has royal connections with the Tudor period and was home for a while to Katherine Parr, Henry VIII’s sixth wife. Queen Elizabeth I, naturally, slept here...

Until the Dissolution of the Monasteries by Henry VIII in the 16th century, Winchcombe had one of the most powerful Benedictine abbeys in the country. Today nothing remains of this apart from fragments of stone incorporated into other buildings. Since then, wool, and briefly (and illicitly) tobacco provided income. Nowadays Winchcombe is a small but flourishing Cotswold centre.

*The route carries on through the narrowing High Street before looping around the town and heading out to Greet. After a couple of miles you will see the entrance to Winchcombe station, part of the restored Gloucestershire Warwickshire Railway where dedicated volunteers now regularly operate a steam train service. About half a mile further on, to your left, the bus passes Winchcombe Pottery, one of the best-known craft potteries in the country. Immediately after the pottery, the bus turns left, following a pleasant rural route through fields and small patches of woodland. This is the Vale of Evesham, an area of especially fertile horticultural land which has become renowned for its fruit and vegetable production. To your right the Cotswold escarpment looms beyond **your first stop in Broadway.***

TOURIST INFORMATION CENTRE

Broadway
Unit 14, Russell Square
High Street
Broadway WR12 7AP
Tel: **01386 852937**

The centre of **Broadway** gives a clue to the origin of its name, originally ‘Broad Village’. Delightful cottages built from local stone frame the main

street and village green, making this a favoured venue for both photographers and artists and giving rise to Broadway’s unofficial title of ‘Jewel of the Cotswolds’. Broadway’s commercial heyday was in the 17th and 18th centuries as an important staging post on the Worcester-London coach route, when 33 inns serviced the needs of travellers, with stabling for the extra horses needed for the long, steep climb ahead.

In the late 19th century the village found favour with artists, writers and composers including J M Barrie, Ralph Vaughan Williams, Edward Elgar, Henry James and John Singer Sargent. In the early 20th century Broadway became a centre for the Arts and Crafts Movement; William Morris was a frequent visitor and Gordon Russell opened a furniture workshop which now houses the Gordon Russell Museum. Links to the village’s artistic connections are still maintained with several high quality art galleries in and around the High Street.

If you are planning to stop to eat we recommend you do it here – there is less time to spare in Chipping Campden, and a lot to see!

GORDON RUSSELL MUSEUM

15 Russell Square, Broadway WR12 7AP

OPEN All year, closed Mondays

Admission charged

Museum celebrating the work of the distinguished furniture designer Sir Gordon Russell, located in his original workshop. Exhibits cover a 60-year period from the first decades of the twentieth century

Broadway to Chipping Campden

Bus service 21 from The Lygon Arms

Leaving Broadway, the bus heads out towards Chipping Campden via the attractive villages of Willersey and Weston-sub-Edge.

Willersey supported a population even as far back as the Iron Age, but nowadays could be described as the embodiment of a typical English village with its church, school, village green, duck pond, public house (or two), shops and delightful stone houses and cottages. Agatha Christie’s Miss Marple might not have lived here, but it wouldn’t have been surprising if she had...

Two miles further on, **Weston-sub-Edge** lies at the foot of the Cotswold escarpment. The village dates back to at least Roman occupation – it is even considered possible that the hillsides to the east of the village might have supported vineyards at this time. Again, Cotswold stone houses are a feature along the main street.

*Beyond Weston-sub-Edge, the route ascends the steep hill towards Chipping Campden. Far-reaching views can briefly be seen behind you to the west and north across the Severn Valley before woodland obscures the scenery. As you near the summit, on your right is **Dover’s Hill**, famous for its ‘Olympick Games’, first organised by Robert Dover in 1612.*

The Games consisted of such well-known sports as shin-kicking, cudgel play, wrestling and hare coursing, with chess and card games for the less ambitious. They were held regularly from the mid 17th to mid 19th century but were then discontinued following their degeneration into drunken brawls, where wrestling and shin-kicking probably came into their own! Revived in 1951, a modified version takes place on the Friday evening after the Spring Bank Holiday.

*Beyond the summit, the road descends into Chipping Campden and your **second stop.***

TOURIST INFORMATION CENTRE

Chipping Campden
The Old Police Station
High Street
Chipping Campden
GL55 6HB
Tel: **01386 841206**

Chipping Campden’s High Street has been described as “the most beautiful village street now left in the island” – G M Trevelyan in his book *English Social*

History (1944). Cotswold stone houses, mellowed by up to 600 hundred years of Cotswold weather, jostle for space with ancient inns, almshouses and civic buildings. There has been a settlement here since at least the 7th century; a Town Charter was granted by Henry II around 1175 which gave permission for a weekly market to be held. The town prospered in medieval times with the development of the woollen industry and many of the older and more substantial houses on the High Street are an enduring testament to the wealth of the wool merchants.

On leaving the bus, head first for the impressive parish church of St James which was significantly enriched with ‘wool money’ to become one of the most notable churches of the area. In the early 20th century the town developed a new focus when the famous London ‘Arts and Crafts’ designer C R Ashbee, set up his Guild of Handicrafts. Although many craftsmen subsequently returned to urban life, several stayed and others joined them, making Chipping Campden a pre-eminent centre for craft and design. Explore this history in the Court Barn Museum and then return through the town to Robert Welch’s shop and the Silk Mills which continue these craft traditions – or remain in the area of the church and visit the Ernest ‘Chinese’ Wilson Memorial Garden.

COURT BARN MUSEUM

Church Street, Chipping Campden GL55 6JE

OPEN All year, closed Mondays

Admission charged

A collection which features the work of the many distinguished craftsmen and designers working in the North Cotswolds. Exhibits date from the Arts and Crafts Movement to the present day

Chipping Campden to Moreton-in-Marsh

Bus service 22 from The Noel Arms

*The bus leaves Chipping Campden via minor roads through rolling upland scenery and attractive villages en route to your next stop. Thatched cottages are a feature of some North Cotswold villages and can be seen both on leaving Chipping Campden and particularly when passing through **Broad Campden** – note its tiny church with an unusual rounded tower. A couple of miles beyond Broad Campden is the larger village of Blockley. Its narrow streets mean that the bus can only navigate the outskirts.*

Like so many other Cotswold towns and villages, **Blockley** prospered through the woollen industry, but when that declined the village diversified into silk production for ribbon makers in Coventry during the 19th century. The fast-flowing Blockley Brook provided the necessary energy for the silk mills and was also sufficiently powerful to enable the village to be amongst the first to produce its own electricity.

Beyond Blockley, the route heads steadily downhill for a couple of miles, passing through the small village of Bourton-on-the-Hill, where there is a delightful view looking ahead down the main street. The immediate area is home to two distinctive gardens: Sezincote (an exotic, Moghul-style house and garden with extensive water features) is on the right as you go through the village, whilst the entrance to Batsford Arboretum (noted for its beautiful spring flowers, magnolias, and cherries as well as autumn colour) is on the left opposite Sezincote, just after leaving the village.

Travelling on to Moreton-in-Marsh, the Wellington Aviation Museum can be seen on the right hand side at the edge of the town – look out for the propeller from a Vickers-Armstrong Wellington outside.

Moreton-in-Marsh developed as a market town in the 13th century, taking advantage of its position at the junction of two major routes, the Fosse Way between Gloucester and Lincoln and what is now the A44 Worcester-Oxford-London road. With the development of turnpike roads in the 18th century Moreton cemented its importance as a coaching town, and unlike many such towns, the arrival of the railway did not bring a decline in prosperity – it is still on the London-Oxford-Worcester main line.

There is a brief halt in Moreton to change buses.

Moreton to Bourton

Bus service 801 from the Town Hall

Leaving Moreton the route follows the line of the Fosse Way for about 4 miles (7km) towards Stow-on-the-Wold. For the last part of the journey, the road climbs gently uphill – Stow is set on a hilltop some 800 feet (240m) above sea level; as the local saying goes: “Stow-on-the-Wold where the wind blows cold”.

Stow-on-the-Wold developed at the junction of the Fosse Way, the Cotswold Ridgeway and the Salt Way. This convenient location led to a further high period of prosperity in the Middle Ages as a centre for the wool industry, and the impressive town square with its substantial stone buildings bears witness to the town's importance at that time.

It is said that at one annual fair 20,000 sheep were sold, and the narrow alleyways leading off the square were specifically constructed to control animal movements. In the 19th century, sheep trading was replaced by horse trading and even today Stow's Horse Fairs draw huge crowds.

Stow is also well-known for its antique shops found in The Square and nearby streets.

*Leaving Stow, once again on the Fosse Way, the bus travels another 4 miles (7km) to Bourton-on-the-Water, **the third stop on this journey.***

TOURIST INFORMATION CENTRE

Bourton-on-the-Water
Victoria Street
Bourton-on-the-Water
GL54 2BU
Tel: **01451 820211**

Bourton-on-the-Water

is perhaps the best known and most picturesque of the North Cotswold towns and villages and could almost

have been built with the intention of delighting its visitors. Bourton is bisected by the pretty River Windrush, which was diverted from its course and channelled through the town in the 17th century to provide power for local mills. Today, as it flows alongside the main street, crossed by graceful stone bridges, and lined by wide grassy banks – and demanding ducks! – it provides an irresistible photo-opportunity to capture the essential Cotswolds.

BOURTON MODEL VILLAGE

The Old New Inn, Rissington Road
Bourton-on-the-Water GL54 2AF

OPEN All year
Admission charged

A 1/9th scale replica of Bourton village built by local craftsmen in the early 1930s. All the local landmarks can be seen, including a model of the Model Village in the garden of the replica Old New Inn.....

Bourton to Cheltenham

Bus service 801 from Newsagents

Departing from Bourton on the final stretch of the journey back to Cheltenham, the bus soon leaves the Fosse Way and turns right, heading up to the plateau. Here are typical exposed Cotswold landscapes: undulating hilltops, small clumps of woodland and a patchwork of fields – some dotted with sheep which were formerly the source of the region's prosperity – can be seen stretching away in all directions. Although few signs of settlement are visible, both farms and villages being sensibly tucked out of sight in the sheltered valleys, there is plenty of evidence for man's presence in the numerous drystone walls which cross the area.

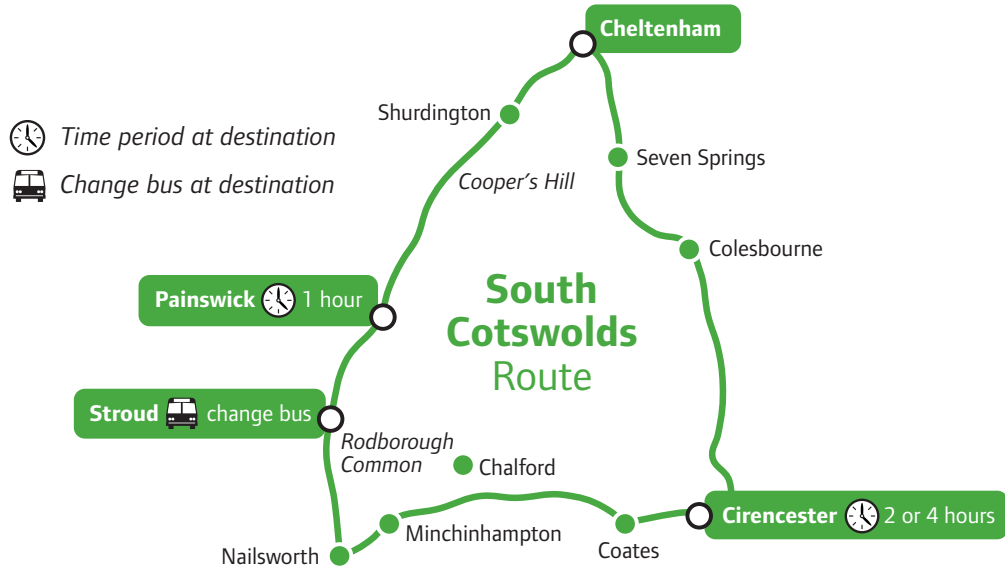
The stone used for these would have been hollowed out from the many quarries, now mainly disused, which can be found locally. The whole area has a sense of space and timelessness – it would be easy to imagine shepherds from a more rural age plodding the tracks to the local markets or searching for livestock in the blizzards which regularly affected the area in winter. Snow fencing used to be a common sight on the hills in winter, but the gradual change in climate has reduced the need for this. The continued grazing of the area by sheep, cattle – and rabbits – maintains what is now thought of as the distinctive Cotswold grassland landscape, but if grazing animals were removed, much of the area, over time, would revert to scrub and woodland vegetation.

*Eventually, the road gradually starts to drop below the plateau, before passing through the village of **Andoversford** where attractive cottages can be seen. On your left where the bus stops is the old cattle market. Leaving Andoversford, the road descends the escarpment via an attractive tree-lined route to the eastern edge of Cheltenham where on your right can be seen Dowdeswell Reservoir.*

Originally, the reservoir was built, together with adjacent water treatment works, to supply drinking water for Cheltenham, but it also now serves as part of the town's flood defence system. The woodland area to the north of the reservoir forms a nature reserve and access can be gained following the route of the Cotswold Way to see an interesting range of plant and bird life.

Beyond the reservoir, the route passes through Cheltenham's suburbs, specifically the formerly separate village of Charlton Kings, which has now been incorporated into the town, although still retaining its own personality. The bus then returns to the town centre and the bus station.

SOUTH COTSWOLDS TOUR



Cheltenham to Painswick

Bus service 46 from the Promenade

The first part of this journey takes you south out of Cheltenham, initially along a straight section of the A46 to the foot of the Cotswold escarpment at Brockworth.

Leaving the Cheltenham suburbs, the bus passes through the village of **Shurdington** which for centuries was purely an agricultural community. However the rapid growth of Cheltenham and construction of a turnpike road in the early nineteenth century led in turn to expansion of the village, and service industries developed alongside more intensive market gardening to supply the needs of the nearby towns. Today, a number of nurseries and market gardens still flourish on the easily-worked, fertile soil.

From Shurdington, the route continues for a couple of miles through Brockworth, developed around the crossroads of historic Ermin Street (the Roman Road linking Cirencester and Gloucester) and Green Street (an ancient salt way leading to and from the salt deposits at Droitwich).

After the traffic island, keep an eye on the wooded skyline just to the left, and you should be able to pick out the grassy rectangle below the crown of the hill.

This is **Cooper's Hill**, home to one of Gloucestershire's more unusual traditions: cheese rolling! The origins of this event, which takes place on the Spring Bank Holiday at the end of May, are somewhat obscure, but are probably in keeping with most British spring traditions, relating to fertility and new life. The concept is very simple: a Double Gloucester cheese is rolled down the hill, pursued by the competitors. The winner gets the cheese. As you might imagine, injuries are not uncommon...

As the bus climbs the Cotswold escarpment, it should be possible to see the Gloucester Trading Estate on the plain below.

Commonplace as it may appear now, until 1962 these hangars housed the Gloster Aircraft Company, pioneers of such internationally known airplanes as the Gloster Gladiator, Meteor and Javelin, as well as Hurricanes and Typhoons of World War II fame.

The road now winds its way up through ancient beechwoods, whilst an increasingly dramatic panorama opens out on your right. There are views over Gloucester and the Severn Vale and in the distance, in fine weather, the Forest of Dean and the Malvern Hills, whilst on the clearest days the Welsh hills are visible.

Beyond the woodland, to your left comes a first glimpse of the rolling Stroud valleys, where winding narrow lanes lead to sheltered, out-of-the-way, villages and hamlets. Your route permits a snapshot of this timeless landscape before descending towards the ancient wool town of Painswick, where you can leave the bus by the church and take a little time to look around.

TOURIST INFORMATION CENTRE

Painswick
(seasonal opening)
The Library
Stroud Road
Painswick GL6 6UT
Tel: 01452 813552

The name of **Painswick** has both Saxon and Norman elements. From the late 15th century, it prospered as a wool town, as can be seen by the many fine buildings

dating from this time onwards. Later, the development of water power in cloth production brought such financial benefit to Painswick that at the peak of its prosperity around twenty mills were involved in the industry. Its fortunes declined with the development of steam power, but the legacy remains in the delightful silver-grey stone buildings of this unspoilt town.

The centre is dominated by the soaring spire of St Mary's Church. The earliest parts of the present building date from the late 14th century, though the spire itself was not built until around 1632. Other major work took place in the early 18th century, coinciding with the rise in Painswick's wealth.

ST MARY'S CHURCH

New Street, Painswick GL6 6UT

OPEN All year, 9.30am-4.30pm

Admission free

Striking late medieval church noted for its table tombs and yew trees

Many of the elegant table tombs in the churchyard also date from this period – they mark the last resting places of local wealthy wool merchants. Ninety nine yew trees planted in 1792 are another feature of the churchyard; it is said that a hundredth will never grow because the devil will pull it out!

Close inspection of the spire will reveal cannon ball scars from the Civil War in 1643 and reconstruction following a lightning strike in 1883.

Painswick to Stroud

Bus service 46 from St Mary's church

The route from Painswick into Stroud follows the Painswick stream, initially high up on the valley side but descending to the valley floor on the outskirts of Stroud.

The steep slopes and high plateaux of the Cotswolds with their thin soils were unsuited to any intensive form of agriculture, but provided pasture land for a local sheep variety known as the 'Cotswold Lion' because of its long, thick fleece. Similarly, the narrow valleys offered little opportunity for cultivation, but water powered mills fed by the fast flowing streams converted the Lions' fleeces into high quality cloth.

Stroud, situated at the convergence of five valleys, particularly profited from this combination of circumstances, and at the industry's peak 150 mills were working in the area. In the 19th century, as steam power replaced water power, Stroud lost out to northern towns such as Bradford which benefited not only from supplies of wool and water but were also close to extensive deposits of coal, providing the power for steam generation. However, there is still plenty of evidence of Stroud's industrial heritage in the many mill buildings in the area; some have been preserved but many have been converted into offices, houses and workshops and are easy to pick out as you pass through the town.

There is a brief halt here to change buses.

Stroud to Cirencester

Bus service 28 from Stroud bus station

Routes out of Stroud either follow along the floor of one of the five valleys or climb steeply back up to the Cotswold plateau. The bus route to Cirencester favours the more dramatic option, and once beyond the environs of Stroud, it crosses the Stroudwater Canal and gradually winds its way up the narrow, twisting slopes of the Frome valley. There are exceptional views looking to your left across towards **Chalford** or back towards Stroud.

In spite of the precipitous slopes, both sides of the valley are surprisingly well-populated, with stone cottages – originally inhabited by weavers – as well as the more impressive houses of prosperous cloth merchants.

Near the summit, the road comes out on to **Rodborough Common**, an area of open grassland roughly 98ha (242acres) in extent.

This was originally a wooded area where local inhabitants had grazing rights but as the population of the area grew, requirements for timber and fuel gradually reduced the wooded area to the hillside fringes. At one time, nearly 1000 people would have been able to exercise these rights but only a few now do so. However, this is sufficient to keep the area under natural control, providing an important undisturbed limestone grassland habitat rich in both plant and insect species. The common was one of the first sites in the country to be designated a European Special Area of Conservation.

Shortly after *The Bear of Rodborough Hotel*, a 17th century coaching inn, the bus enters **Minchinhampton Common**, forking right to the village of Amberley. If you look to the left along here, it may be possible to pick out the low mound of *Whitefield's Tump*, a Neolithic long barrow. This odd name derives from *George Whitefield*, one of the founders of Methodism, who preached from the Tump in 1743 – tump being a local word meaning mound or small hill.

Continuing into Amberley, the bus turns left just opposite the Amberley Inn. From here, there are striking views across the Nailsworth valley. The mills throughout this area were powered by water but on the skyline, can be seen a more modern – and controversial – energy supplier: a wind turbine. This is located near the village of Nymphsfield and generates enough power annually to supply 280 homes.

The road now crosses the southern edge of **Minchinhampton Common** which, in origin and ecological importance, is very similar to Rodborough Common. Minchinhampton, however, is also a Scheduled Ancient Monument with both prehistoric and medieval interest. To the left by the Halfway House Inn, it should be possible to see part of The Bulwarks, a defensive rampart stretching for roughly a mile across the common, and other structures, such as *Whitefield's Tump*, are scattered over the area. Interestingly, although both commons are owned and managed by the National Trust, the grass remains the property of the graziers.

The road into Minchinhampton, with its modern housing, gives little hint of the 17th and 18th century Cotswold stone buildings and narrow streets at the heart of the town. The bus turns left into the Market Square where the traditional Market House and nearby church are of particular note.

Minchinhampton is a small town with an unusual location on the Cotswold plateau, most settlements in this area wisely favouring the more sheltered valleys. The first historical reference was in the 8th century, and by the time of the Domesday Survey the Manor of Hampton was valued at £28, significantly more than Cheltenham at that period! The land became the property of L'Abbaye aux Dames in Normandy around 1080; the name 'Minchinhampton' meaning 'Nuns' settlement'.

After leaving Minchinhampton, the road to Cirencester runs across the Cotswold plateau, passing the Aston Down Polo Club on the left and the Cotswold Gliding Club on the right, close to the junction with the A419.

The route continues towards Cirencester, mostly along the A419, but with a short diversion into the little village of Coates.

The word 'Coates' means 'cottages' – not particularly original and perhaps indicative of the lack of distinctive landscape features in this area. However, Coates has a particular claim to fame in that the source of the River Thames is located in a field adjacent to the village.

Just before you enter Cirencester, on the right, is the Royal Agricultural College – the first agricultural college in the English-speaking world, granted a Royal Charter by Queen Victoria in 1845. Once past the college, the route bears left briefly on to the Fosse Way, the Roman road linking Exeter and Lincoln, before entering the town for the second stop of your tour.

TOURIST INFORMATION CENTRE

Cirencester
Corinium Museum
Park Street
Cirencester GL7 2BX
Tel: 01285 654180

Cirencester is a busy Cotswold market town with a history stretching back nearly 2000 years. The Romans initially developed a military site here in the 1st century

AD, but as their frontier moved north following the conquest of Wales a civilian town grew up on the site. As this was located at the intersection of two major Roman roads, the Fosse Way and Ermin Way, it became a significant Roman settlement, at one stage second only to London in both size and importance. Even in this period wool and cloth were a considerable source of wealth for the town.

It is not surprising to discover that during the Middle Ages the wool trade again fuelled Cirencester's prosperity and the evidence remains in the magnificent parish church and the substantial Cotswold stone houses around

CORINIUM MUSEUM

Park Street, Cirencester GL7 2BX

OPEN All year, Mon-Sat 10am-5pm, Sun 2-5pm
Admission charged

The museum combines an impressive collection of Roman artefacts together with many other items of interest from the local area

the market square. As well as the church, and the Corinium Museum, the craft gallery and studio workshops at Brewery Arts are well worth a visit. Alternatively, if the weather is good you might head towards Cecily Hill, not far from the museum, where you will find the entrance to Cirencester Park. The park is the venue for polo on summer Sundays but is open to the public free of charge 'on foot or on horseback' throughout the year.

Cirencester to Cheltenham

Bus service 151 from the Corn Hall

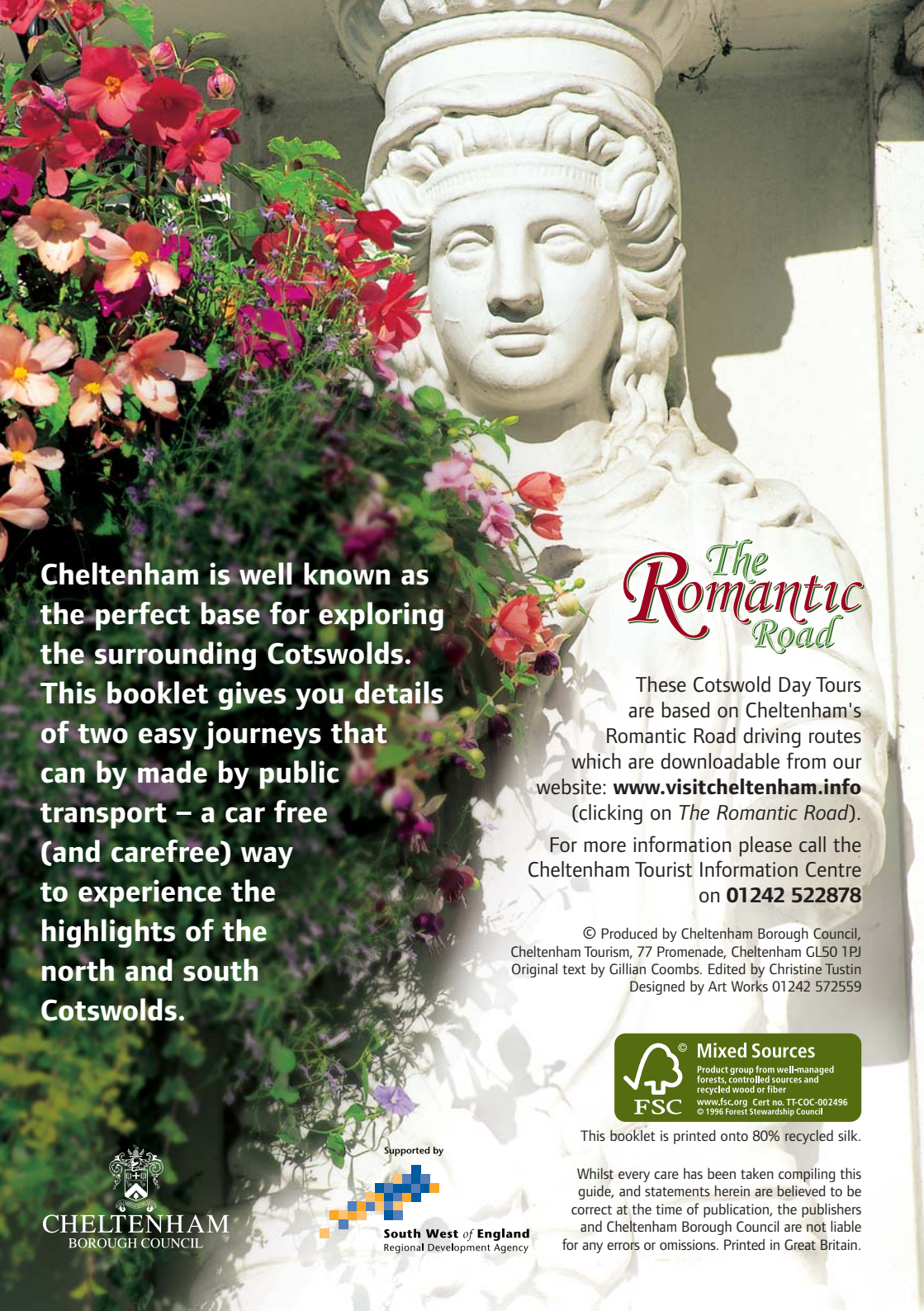
Having entered the town on one Roman road, the route now briefly follows another, Ermin Way, which runs from Gloucester to Silchester in Hampshire. However, on the edge of town the bus diverts north towards Cheltenham, following the lazily meandering valley of the River Churn for the first part of the journey.

Although without any particularly notable features, this is still a very pleasant ride through several small villages and the attractively wooded river valley; the river, although small, is usually visible to the right of the road. About 5 miles (8km) north of Cirencester the road passes Colesbourne Park, noted for its botanically significant snowdrop collection (open to the public in early spring).

Leaving behind the Cotswold stone cottages of Colesbourne, the route continues through the rolling uplands to a major road intersection at an area known as Seven Springs.

This area is the source of the River Churn, and since the Churn is itself a tributary of the Thames there is quite a good alternative case to be made for Seven Springs as the source of the River Thames. Although not perhaps quite as controversial as the source of the Nile, it is nevertheless a cause of debate amongst those favouring one or other of the sites!

Beyond Seven Springs the road suddenly crests at the top of the escarpment and then descends quite steeply back into Cheltenham. On a clear day the views over the town and northwards can be spectacular, and apart from the necessary suburban meanderings back to the bus station, provide a fitting end to your journey.



Cheltenham is well known as the perfect base for exploring the surrounding Cotswolds. This booklet gives you details of two easy journeys that can be made by public transport – a car free (and carefree) way to experience the highlights of the north and south Cotswolds.

The Romantic Road

These Cotswold Day Tours are based on Cheltenham's Romantic Road driving routes which are downloadable from our website: www.visitcheltenham.info (clicking on *The Romantic Road*).

For more information please call the Cheltenham Tourist Information Centre on **01242 522878**

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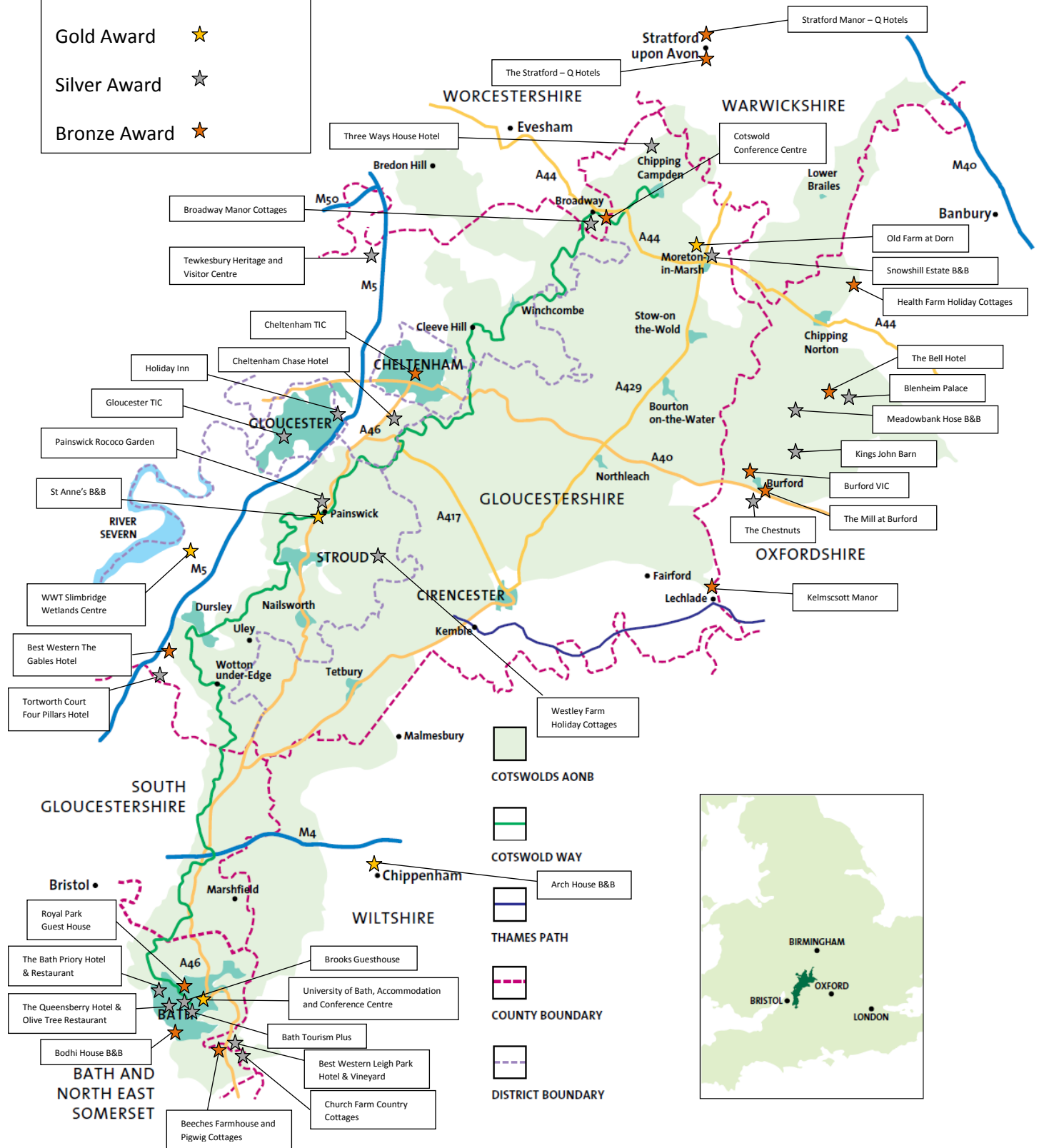


South West of England
Regional Development Agency

Cotswolds Area of Outstanding Natural Beauty and the Green Tourism Business Scheme

Key

- Gold Award ★
- Silver Award ☆
- Bronze Award ⬤



Appendix C

Strategic and management policy context

The Cotswolds AONB Sustainable Tourism Strategy reflects the current national, regional and local policies for sustainable development and tourism. The following provides an overview of national and regional policies and strategies relating to tourism in the Cotswolds.

National Policies

England: A Strategic Framework and Action Plan for Tourism 2010 – 2020

Visit England

Visit England was created in 2009 to provide the leadership to market England, drive forward developments in quality, ease of access and sustainability, and to improve data collection and market intelligence.

This Strategic Framework sets out the vision of Visit England which is to maximize tourism's contribution to the economy, employment and quality of life in England. The four overall, interdependent aims are to increase England's share of global visitor markets, to offer visitors compelling destinations of distinction, to champion a successful thriving tourism industry, and to facilitate greater engagement between the visitor and the experience. Overall, Visit England aim to achieve a 5% annual growth in the visitor economy.

The Framework recognizes the Cotswolds as one of England's "world famous and exceptional destinations" which has the ability to "attract new visitors who can then be encouraged to explore the richness of England," therefore widening the economic benefits of tourism. The country's internationally renowned built and natural heritage is seen as a key asset in delivering authentic and world class experiences for visitors.

Sustainable Tourism in England: A framework for action. Meeting the key challenges. Department for Culture, Media and Sport, March 2009

This framework sets out the environmental and social challenges that the tourist industry currently faces and ways in which they can be met. It focuses on six key challenges which are: to minimize environmental impact and resource use; address the impact of tourism transport; improve quality and make holidays accessible to all; improve the quality of tourism jobs; maintain and enhance community prosperity and quality of life; reduce the seasonality of demand. The framework expands on each of these challenges, proposes flexible responses and ideal potential outcomes.

Winning: A tourism strategy for 2012 and beyond Department for Culture, Media and Sport

The aims of this tourism strategy are to maximize the financial benefits of the 2012 Olympic Games for the tourism industry. The strategy's vision is to use the Games to engage all tourism businesses, improve international perceptions of Britain, deliver a first-class welcome, improve

the skills of the workforce, drive up quality, maximize the opportunities for increasing business visits and events, spread the benefits and improve sustainability.

Natural England's position on inspiring people to value and conserve the natural environment

This paper sets out the Natural England's position on inspiring people to value and conserve the natural environment.

The paper explains the main principles of Natural England which are:

- Inspiring people to value and conserve the natural environment is critical to the success of their long term strategic vision.
- There should be the widest range of opportunities for people of all abilities, ages, ethnic groups and social circumstances actively to engage in, value, enjoy and be inspired by the natural environment.
- Opportunities to be inspired by the natural environment should aid healthy activity and be integral to people's daily lives particularly close to where they live.
- Inspiring people through valuing and conserving the landscape and wildlife is an essential outcome for all our work.

Regional and Sub-Regional Policies

South West

The **South West Regional Economic Strategy** (2006-2015) produced by the SWRDA highlights tourism as one of 8 priority sectors of the economy, selected because it is *"going through major transition and needs assistance to meet the challenges of that change"*. It stresses the important role of towns and cities in driving growth in the region *"which means increasing investment in infrastructure, culture and regeneration"*. It also states that *"traditionally important to the region, tourism drives the perception and reputation of the South West and provides employment to many in otherwise marginal economies. There is a pressing need to improve the quality of the offer and to make the industry more productive and more sustainable."*

The importance of adopting a more sustainable approach is highlighted in the **Regional Sustainable Development Framework for the South West**. This talks about the need to encourage greater use of public transport, extend the season, minimise visitor impacts, maximise the use of local suppliers, 'green' tourism businesses and involve the local community. The SW Climate Change Impacts Partnership has produced an action pack showing how tourism businesses can take practical action on this front.

The strategy **Towards 2015: Shaping Tomorrow's Tourism** developed by South West Tourism and the South West Regional Development Agency and which is currently under review, defines sustainable tourism *"as satisfying visitors, businesses and local communities without damaging the environment now or for the future"....."it is about managing the impact of*

visitors on the environment and on local communities, minimising adverse effects, whilst ensuring long term viability, with investment as far as possible aiming to keep spend in the local community”.

The overall vision is that *“by 2015, the South West of England will be internationally recognized as a model tourism destination. This will be achieved by creating a unique balance between its environment, communities, industry and visitor satisfaction, while earning long-term economic, environmental and social benefit for the whole region.”*

The strategy identifies 3 strategic aims which are:

- Driving up quality
- Delivery truly sustainable tourism
- Establishing better and more efficient arrangements for delivering tourism at the destination level.

With the demise of the regional tourist boards in 2011, the emerging draft guiding principles for tourism transition in the South West England sets out guidance for the delivery of sustainable tourism development in this region in the future. This adopts the 4 priority areas identified by Visit England in the Strategic Framework for Tourism which are:

- Marketing for sustainable growth
- Offer compelling destinations of distinction
- Champion a successful thriving tourism industry
- Improve the quality of the visitor experience

The **Gloucestershire Economic Strategy 2003-2014** draws together a consensus of ideas for the economic well-being of Gloucestershire which is underpinned by the principle of sustainable development. It recognizes that heritage and cultural history are essential components of the county’s quality of life as well as being significant contributors to the economic success of the county including the attraction of visitors. Tourism is identified as major player in the Gloucestershire economy and one which is heavily dependent on the high quality of the built and natural environment. It states that *“sustainability is important in maintaining the attractive qualities of the county and is to be strongly encouraged, and visitors must add value rather than volume.”*

Bath and North East Somerset Destination Management Plan October 2007

The overall aim of this plan is *“to develop a viable and sustainable visitor economy which continues to make an important contribution to the economic vitality of Bath and the surrounding area, enhances its image and standing, is in harmony with its unique environment, and adds to the quality of life for its residents.”*

Key principles underpinning the strategy are: aim high; focus on value not volume; position Bath as something special; capitalise on links with hinterland; freshen the offer; embrace sustainability; integrated management,

The Plan recognizes the importance of the surrounding countryside to Bath. *“This rich hinterland adds significantly to the visitor offer. Visitors staying in the countryside will almost certainly visit Bath and the countryside extends the offer for those staying in the City.”*

West Midlands

The West Midlands Economic Strategy Delivery Framework May 2008 has three underlying principles: pursuing equality reaping the benefits of diversity; valuing the natural environment and supporting urban and rural renaissance. Its priorities include maximizing the cultural offer and natural assets to visitors, people and businesses.

West Midlands Visitor Economy Strategy Advantage West Midlands, March 2008

The strategy for the West Midlands region is underpinned by sustainability and commits to ensuring that sustainability is embedded across all its activities. The vision for this region is for it to be a global visitor destination where people, business and culture choose to connect. The focus for its objectives includes capitalizing on the cultural heritage of the West Midlands to grow the short break market, to deliver a high quality food and drink experience and to develop a high profile events and festivals programme.

Recognition is given to the Cotswolds as an important associated brand and a gateway to the West Midlands region.

On target for growth

Visitor Economy Strategy for Coventry & Warwickshire 2005-2009

This strategy recognizes that the Cotswolds is a strong brand that sits within the ‘Best of England’ triangle ie the triangle formed by Windsor, Bath and Stratford which contains many of the ‘icon’ destinations for overseas visitors. It also argues in favour of working without borders and identifying opportunities to expand the geographical remit of the DMOs.

Coventry and Warwickshire Destination Management Partnership Business Plan 2008-2011

The vision of the Coventry and Warwickshire DMP is to *“Strengthen and maintain the sub-region’s reputation as a premier quality destination for domestic and international business and leisure visitors, and to attract more people to come and stay longer and visit more places within the sub-region.”*

The strategic priorities for the DMP include market research, business support, skills development, transport and accessibility infrastructure, visitor information strategy, international and nation profile and tourism business generation and product development.

Destination Worcestershire Development and Action Plan 2008 – 2012

The underlying aims for tourism in Worcestershire are:

- To provide all visitors to Worcestershire with a high quality, enjoyable and fulfilling experience
- To ensure that tourism meets its potential as a driver of the Worcestershire economy, bringing prosperity and jobs throughout the area
- To ensure local communities are not adversely affected by tourism
- To develop the appreciation of Worcestershire's distinctiveness as somewhere to live, work and visit
- To encourage tourism enterprises, their suppliers and customers to reduce the impact of tourism on the environment.

Destination Worcestershire incorporates Integrated Quality Management into its destination management strategy. This is an approach to place making and destination management that has been articulated by the European Union, and taken up by a number of destinations throughout Europe, including in Exmoor.

South East

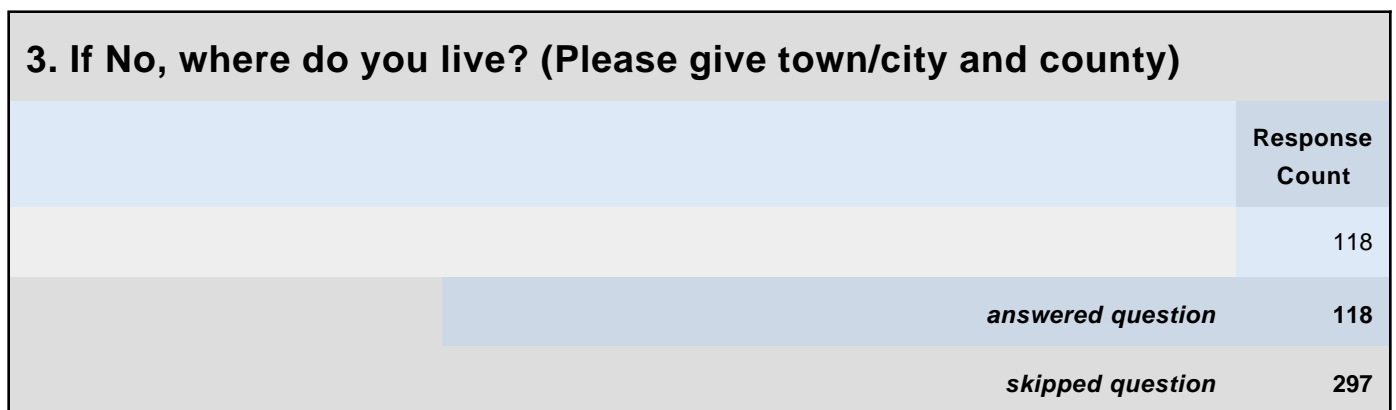
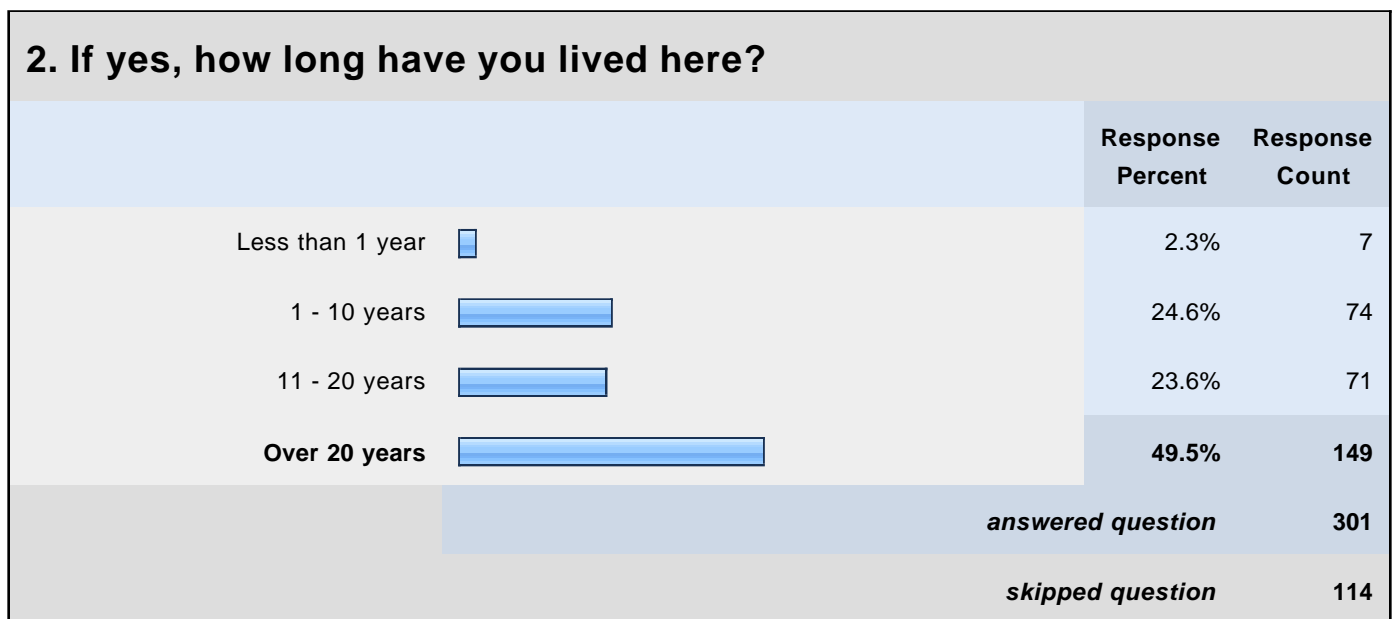
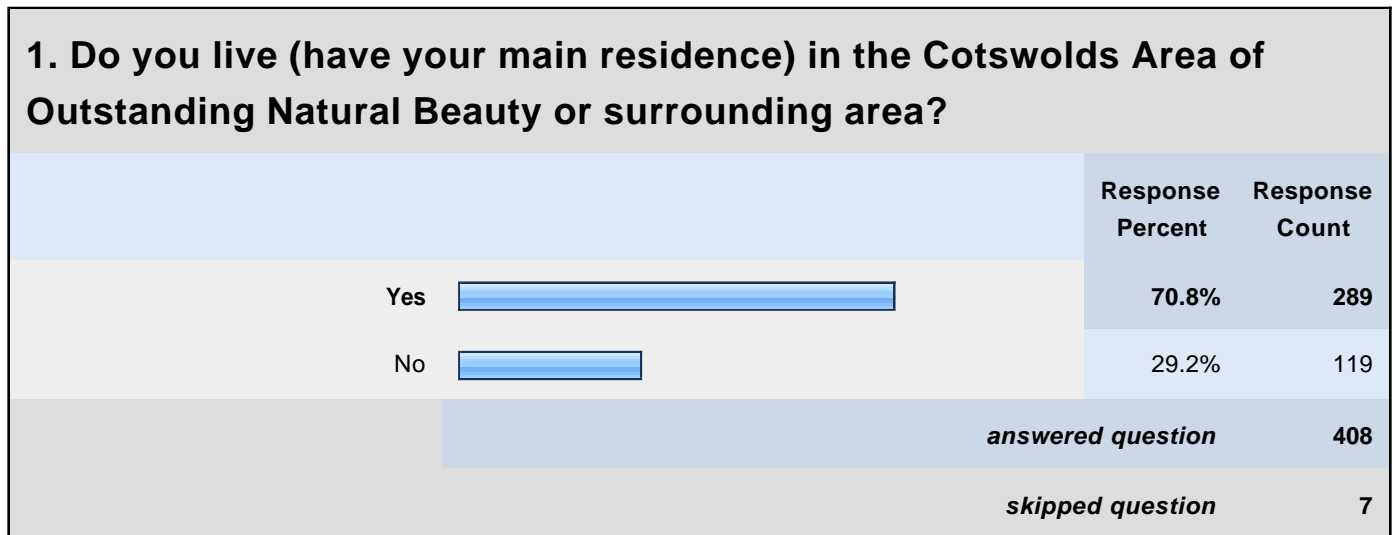
The **South East Regional Economic Strategy 2006-2016** sets out its key priorities which, for the rural South East includes the investment and promotion of the area's cultural, heritage and landscape assets, and development of the visitor economy linked to the conservation of a high quality environment.

Tourism South East (TSE) is a private/public partnership with more than 2000 commercial and 70 local authority members. As the strategic tourism body for the South East of England, its aim is to support and assist a competitive, growing, profitable and sustainable tourism industry in the region. TSE's principal funder is the South East England Development Agency (SEEDA).

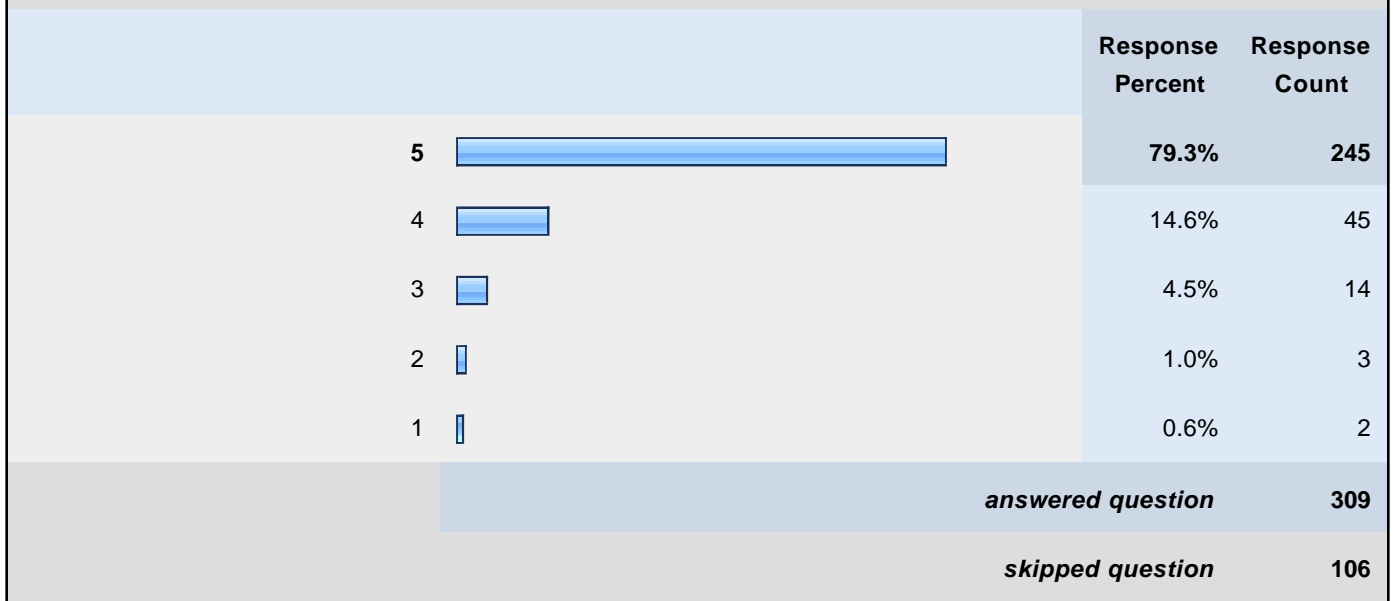
West Oxfordshire District Council Tourism Strategy 2009-2012

This document outlines the vision, priorities and actions for Oxfordshire Cotswolds, the overall aim of which is: *"To develop and promote the Oxfordshire Cotswolds as a must see visitor destination and further develop sustainable tourism in West Oxfordshire to enhance the quality of life for local people whilst encouraging visitors to come to the area, spend more, stay longer and return."*

Underpinning the strategy are three main focus areas: value over volume; marketing; and sustainability.



4. Please rate how much you like living in the Cotswolds, where 5 is 'like a lot' and 1 is 'not like at all'(Cotswolds residents only)



5. What do or don't you like about living in the Cotswolds?



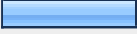
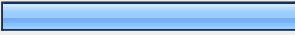
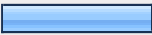


6. Which of the following features do you think attracts visitors to the Cotswolds? (Tick all that apply)

		Response Percent	Response Count
Pretty towns and villages		96.1%	374
Places to eat and drink		64.5%	251
Landscape and countryside		91.8%	357
A designated Area of Outstanding Natural Beauty		54.0%	210
Museums, galleries and theatres		30.1%	117
Events and festivals		53.7%	209
Opportunities for walking and cycling		82.5%	321
Cotswold Way National Trail		64.8%	252
Wildlife and nature		62.7%	244
Visitor attractions		45.2%	176
Gardens and parks		66.6%	259
Local produce		40.4%	157
Places to stay		54.8%	213
Peace and quiet		71.0%	276
answered question			389
skipped question			26

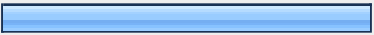
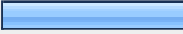

7. Other features? Please specify

	Response Count
	80
answered question	80
skipped question	335

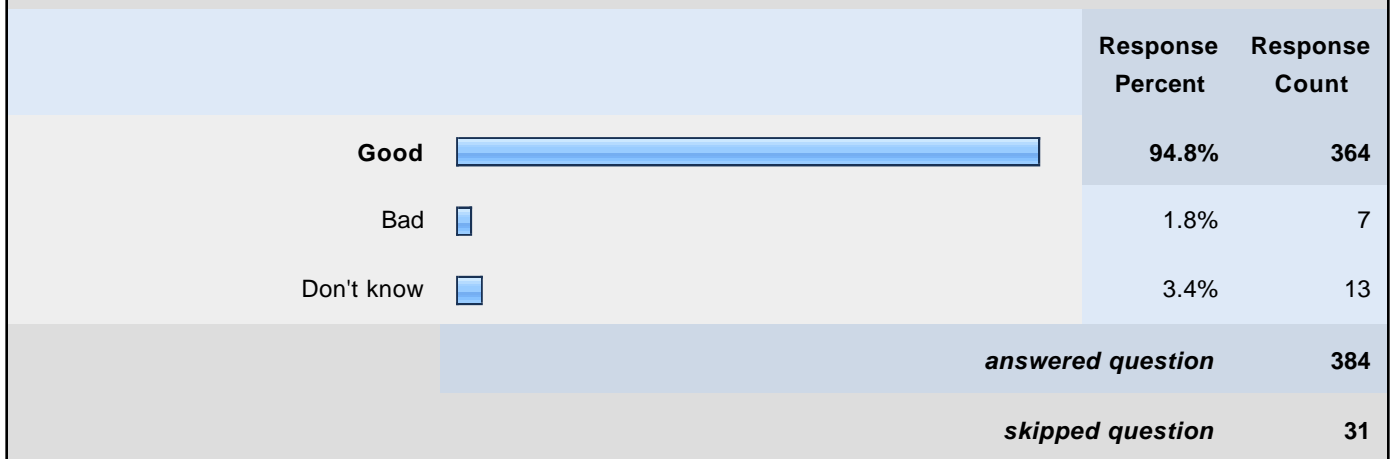
8. Over the last five years, do you think the number of visitors to the Cotswolds has:

	Response Percent	Response Count
Increased a lot 	21.2%	80
Increased a little 	47.5%	179
Remained the same 	24.1%	91
Decreased a little 	5.6%	21
Decreased a lot 	1.6%	6
<i>answered question</i>		377
<i>skipped question</i>		38

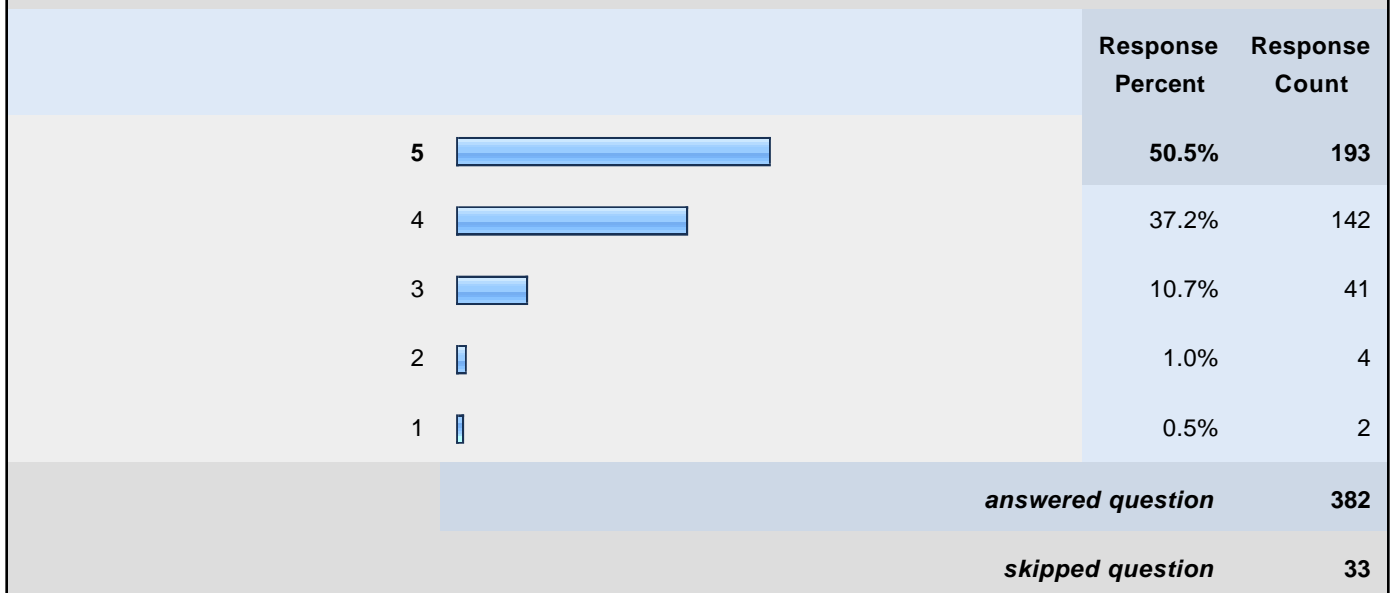
9. In terms of visitor numbers, do you think that the Cotswolds:

	Response Percent	Response Count
Has about the right number of visitors 	60.0%	225
Would benefit from more visitors 	29.9%	112
Receives more visitors than it can cope with 	10.1%	38
Other comments:		84
<i>answered question</i>		375
<i>skipped question</i>		40

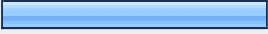
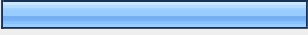

10. Generally, do you think that tourism is good or bad for the Cotswolds?



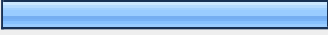

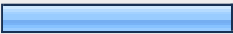
11. Please rate how important you think tourism is to the local economy of the Cotswolds, where 5 is 'very important and 1 is 'not very important.



12. To what extent do you feel that visitors to the Cotswolds affect your day-to-day life?

	Response Percent	Response Count
They don't affect my day-to-day life at all 	42.9%	137
They affect my day-to-day life a little 	49.5%	158
They affect my day-to-day life a lot 	7.5%	24
answered question		319
skipped question		96

13. Overall, how would you describe that effect?

	Response Percent	Response Count
Positive 	52.9%	165
Negative 	9.9%	31
Neutral 	37.2%	116
answered question		312
skipped question		103

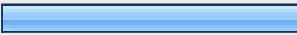


14. How would you rate the effect of tourism in the Cotswolds on the following:

	Very good effect	Good effect	No effect	Bad effect	Very bad effect	Response Count
Choice of places to eat & drink	28.7% (104)	61.9% (224)	7.2% (26)	1.9% (7)	0.3% (1)	362
Choice of shops	14.8% (52)	56.8% (200)	21.3% (75)	6.0% (21)	1.1% (4)	352
Public transport provision	5.6% (20)	24.9% (88)	61.6% (218)	5.4% (19)	2.5% (9)	354
Range of attractions and leisure facilities	16.3% (57)	64.8% (226)	16.9% (59)	2.0% (7)	0.0% (0)	349
Condition of the natural environment	17.7% (63)	34.8% (124)	24.4% (87)	21.6% (77)	1.4% (5)	356
Traffic	1.1% (4)	6.2% (22)	18.6% (66)	59.2% (210)	14.9% (53)	355
Condition of historic buildings	15.7% (56)	53.7% (191)	26.7% (95)	3.9% (14)	0.0% (0)	356
Litter	1.7% (6)	6.0% (21)	30.4% (107)	47.2% (166)	14.8% (52)	352
Access to the countryside	15.2% (54)	49.3% (175)	30.4% (108)	4.8% (17)	0.3% (1)	355
Character of the local area	15.1% (53)	35.3% (124)	34.5% (121)	13.7% (48)	1.4% (5)	351
Noise	1.7% (6)	4.7% (16)	52.2% (179)	35.3% (121)	6.1% (21)	343
Wildlife & plants	9.6% (34)	23.4% (83)	46.9% (166)	19.2% (68)	0.8% (3)	354
Views and landscape	18.3% (64)	25.1% (88)	52.3% (183)	4.3% (15)	0.0% (0)	350
Employment opportunities	16.5% (57)	57.1% (197)	21.4% (74)	3.8% (13)	1.2% (4)	345
Parking	2.0% (7)	12.3% (43)	19.1% (67)	54.7% (192)	12.0% (42)	351
Commodity prices	2.0% (7)	10.1% (35)	46.4% (160)	33.9% (117)	7.5% (26)	345
answered question						366

15. To what extent do you agree or disagree with the following statements?

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Agree strongly	Response Count
Visitors make where I live more lively and fun	3.5% (12)	13.7% (47)	47.8% (164)	31.5% (108)	3.5% (12)	343
I benefit from the facilities and services created for visitors	3.8% (13)	11.0% (38)	23.5% (81)	53.0% (183)	8.7% (30)	345
Visitors intrude on my privacy	9.7% (33)	40.2% (137)	37.8% (129)	10.6% (36)	1.8% (6)	341
I enjoy meeting visitors	1.2% (4)	4.1% (14)	28.7% (98)	55.3% (189)	10.8% (37)	342
I am welcoming and friendly to visitors	1.8% (6)	2.3% (8)	16.7% (57)	64.5% (220)	14.7% (50)	341
I dislike meeting visitors	30.8% (103)	46.7% (156)	19.5% (65)	2.1% (7)	0.9% (3)	334
<i>answered question</i>						348
<i>skipped question</i>						67

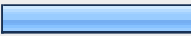
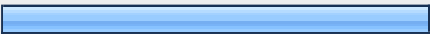
16. Do you feel that tourism in the Cotswolds is currently managed in a sustainable way?

	Response Percent	Response Count
Yes 	48.1%	173
No 	13.6%	49
Don't know 	38.3%	138
<i>answered question</i>		360
<i>skipped question</i>		55

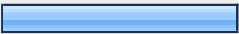
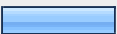

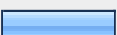


17. Please add any further comments you have regarding tourism in the Cotswolds.

	Response Count
	119
<i>answered question</i>	119
<i>skipped question</i>	296




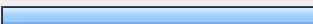
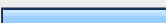

18. Do you or anyone in your household work in a job where you come into contact with visitors?

	Response Percent	Response Count
Yes 	30.6%	108
No 	69.4%	245
<i>answered question</i>		353
<i>skipped question</i>		62







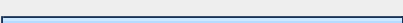
19. In what area is this type of work?

	Response Percent	Response Count
Accommodation 	38.0%	30
Attractions 	17.7%	14
Food & drink 	12.7%	10
Retail 	17.7%	14
Transport 	6.3%	5
Activity 	7.6%	6
Other (please specify)		67
<i>answered question</i>		79
<i>skipped question</i>		336

20. Which age group do you fall into?

	Response Percent	Response Count
16-24 	1.7%	6
25-34 	3.9%	14
35-44 	8.8%	32
45-64 	50.7%	184
65-74 	26.7%	97
75+ 	8.3%	30
<i>answered question</i>		363
<i>skipped question</i>		52


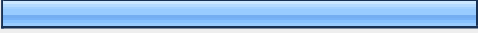
21. Please include your name, address and email below if you would like to be entered into our prize draw. Your details will not be used for any other purposes.

	Response Percent	Response Count
Name: 	98.3%	291
Address 1: 	97.0%	287
Address 2: 	66.2%	196
City/Town: 	90.5%	268
County: 	84.1%	249
Postal Code: 	88.9%	263
Email Address: 	65.2%	193
<i>answered question</i>		296
<i>skipped question</i>		119


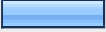
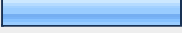
1. Please complete the following contact details about your business			Response Percent	Response Count
Name of business	<input type="text"/>		100.0%	33
Contact name	<input type="text"/>		100.0%	33
Postal address	<input type="text"/>		97.0%	32
Telephone	<input type="text"/>		93.9%	31
Email address	<input type="text"/>		97.0%	32
Website address	<input type="text"/>		97.0%	32
<i>answered question</i>				33
<i>skipped question</i>				0

2. With which of the following sectors is your business involved? (Please tick all that apply)			Response Percent	Response Count
Serviced accommodation	<input type="checkbox"/>		42.4%	14
Self-catering accommodation	<input type="checkbox"/>		27.3%	9
Caravan or camping	<input type="checkbox"/>		9.1%	3
Visitor attraction	<input type="checkbox"/>		12.1%	4
Activity centre or operator	<input type="checkbox"/>		9.1%	3
Food and drink	<input type="checkbox"/>		6.1%	2
Other (please specify below)	<input type="checkbox"/>		15.2%	5
			Other	6
<i>answered question</i>				33
<i>skipped question</i>				0

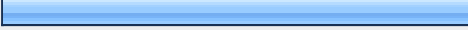





3. How long has the business operated under the existing ownership?

		Response Percent	Response Count
Less than 12 months		0.0%	0
12 months to 2 years		0.0%	0
2 to 5 years		22.6%	7
Longer than 5 years		77.4%	24
<i>answered question</i>			31
<i>skipped question</i>			2




4. How many staff (including proprietors) currently work in your business?

		Response Percent	Response Count
Full-time, year-round		90.3%	28
Part-time, year-round		41.9%	13
Full-time, seasonal		16.1%	5
Part-time, seasonal		29.0%	9
<i>answered question</i>			31
<i>skipped question</i>			2

5. Does your business hold any of the following awards or accreditations? (Please tick all that apply)

	Response Percent	Response Count
National Quality Accommodation Assessment 	76.2%	16
VAQAS 	9.5%	2
Green Tourism Business Scheme 	23.8%	5
National Accessible Scheme	0.0%	0
Walkers Welcome 	14.3%	3
Cyclists Welcome 	14.3%	3
Other (please specify below) 	14.3%	3
	Other	10
answered question		21
skipped question		12

6. If your business holds a National Quality Accommodation award, what is your current star rating?

	Response Percent	Response Count
1 star	0.0%	0
2 star	0.0%	0
3 star 	15.0%	3
4 star 	70.0%	14
5 star 	15.0%	3
answered question		20
skipped question		13

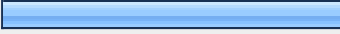
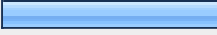
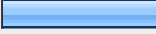
7. Where do your customers come from? (Please provide approximate percentages)

	Response Average	Response Total	Response Count
Local/The Cotswolds	23.62	307	13
London/SE	21.40	428	20
South West	8.87	133	15
Midlands	12.80	192	15
Elsewhere in UK	27.90	586	21
Overseas	24.00	528	22
	<i>answered question</i>		22
	<i>skipped question</i>		11



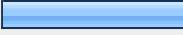


8. If you are an accommodation provider, what is the average length of stay for your guests?

	Response Count
	18
	<i>answered question</i>
	18
	<i>skipped question</i>
	15

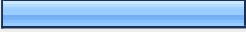



9. Please give an estimate of visitor numbers for your business for 2009.

		Response Percent	Response Count
Serviced accommodation - average room occupancy (%)		55.0%	11
Self-catering accommodation - average unit occupancy (%)		35.0%	7
Visitor attractions - annual visitor numbers		25.0%	5
answered question			20
skipped question			13

10. How would you describe business over the past year?

		Response Percent	Response Count
Increased a lot		4.2%	1
Increased a little		41.7%	10
Stayed the same		29.2%	7
Decreased a little		16.7%	4
Decreased a lot		8.3%	2
answered question			24
skipped question			9

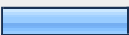
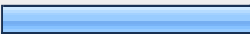
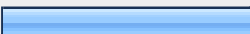
11. Approximately what percentage of your customers are repeat customers?

	Response Percent	Response Count
Less than 25% 	39.1%	9
Between 25% and 50% 	47.8%	11
Between 50% and 75% 	8.7%	2
Over 75% 	4.3%	1
<i>answered question</i>		23
<i>skipped question</i>		10

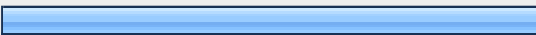

12. What type of visitors do you attract? (Please provide approximate percentages)

	Response Average	Response Total	Response Count
Families (%)	17.20	344	20
Young couples (%)	20.86	438	21
Groups (%)	12.50	225	18
Middle-aged couples (%)	28.86	635	22
Older couples (%)	27.60	552	20
<i>answered question</i>			22
<i>skipped question</i>			11



13. Does your business participate in any of the following schemes?

	Response Percent	Response Count
David Bellamy Conservation Awards Scheme 	20.0%	1
Visitor Payback Scheme 	40.0%	2
The Carbon Trust	0.0%	0
Energy Saving Trust	0.0%	0
Local environmental/sustainable tourism scheme 	40.0%	2
Please provide more details here of these or other schemes in which your business is involved		5
<i>answered question</i>		5
<i>skipped question</i>		28


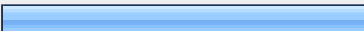
14. Do you promote local goods, produce or services to your customers?

	Response Percent	Response Count
Yes 	87.5%	21
No 	12.5%	3
If yes, please provide further details		18
<i>answered question</i>		24
<i>skipped question</i>		9

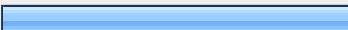
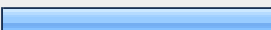
15. Do you promote alternative transport services to your customers, eg bus, train, cycle?

	Response Percent	Response Count
Yes 	73.9%	17
No 	26.1%	6
If yes, please provide further details		16
answered question		23
skipped question		10



16. Do you get involved in any other kind of sustainable tourism or environmentally-friendly initiatives?

	Response Percent	Response Count
Yes 	40.9%	9
No 	59.1%	13
If yes, please provide further details		9
answered question		22
skipped question		11



17. Do you actively promote your green or sustainable credentials to visitors?

	Response Percent	Response Count
Yes 	56.5%	13
No 	43.5%	10
If yes, please provide further details		9
answered question		23
skipped question		10


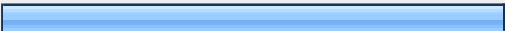

18. Do you promote your business as being part of the Cotswolds AONB?

	Response Percent	Response Count
Yes 	52.2%	12
No 	47.8%	11
<i>answered question</i>		23
<i>skipped question</i>		10

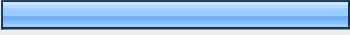
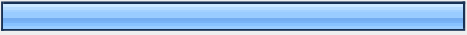
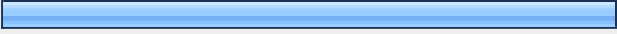
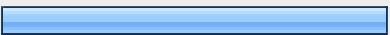
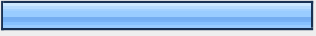
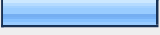
19. Have you visited the Cotswolds AONB website recently?

	Response Percent	Response Count
Yes 	52.2%	12
No 	47.8%	11
<i>answered question</i>		23
<i>skipped question</i>		10

20. If you have recently visited the AONB website, what is your overall opinion of it?

	Response Percent	Response Count
Excellent 	9.1%	1
Good 	81.8%	9
Average 	9.1%	1
Poor	0.0%	0
How could we improve the website?		6
<i>answered question</i>		11
<i>skipped question</i>		22

21. Are you aware of the following services offered by the Cotswolds Conservation Board? (Please tick all that apply):

		Response Percent	Response Count
Free guided walks programme		56.3%	9
Cotswold Voluntary Wardens		75.0%	12
Biannual 'Cotswold Lion' newspaper		100.0%	16
Explore the Cotswolds by Public Transport guide		62.5%	10
Rural skills courses eg dry-stone walling		50.0%	8
Sustainable Development Fund		25.0%	4
answered question			16
skipped question			17

22. Would you be interested in any of the following services from the Cotswolds Conservation Board?

	Yes	No	Response Count
Familiarisation/awareness visits	82.4% (14)	17.6% (3)	17
Business support and advice	64.7% (11)	35.3% (6)	17
Regular (but not too often) communication about AONB events and news	95.2% (20)	4.8% (1)	21
Marketing/promotional opportunities	90.5% (19)	9.5% (2)	21
Networking with other sustainable tourism businesses	77.8% (14)	22.2% (4)	18
answered question			22
skipped question			11

23. What do you believe will be the biggest challenges faced by your business over the next 5 years?

	Response Count
	16
<i>answered question</i>	16
<i>skipped question</i>	17

24. What do you believe are the priority areas that should be addressed when developing and promoting tourism in the Cotswolds AONB over the next 5 years?

	Response Count
	14
<i>answered question</i>	14
<i>skipped question</i>	19

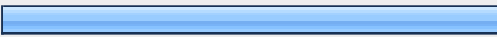
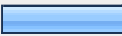
25. How do you think you can use the Cotswolds AONB as an asset to your business?

	Response Count
	12
<i>answered question</i>	12
<i>skipped question</i>	21

26. Do you have any further comments that you would like to make about your business, sustainable tourism, or the Cotswolds AONB in general?

	Response Count
	7
<i>answered question</i>	7
<i>skipped question</i>	26

27. Can we contact you again with regard to developing sustainable tourism in the Cotswolds AONB?

	Response Percent	Response Count
Yes 	81.0%	17
No 	19.0%	4
<i>answered question</i>		21
<i>skipped question</i>		12

APPENDIX E

South East Protected Landscapes Working on behalf of AONBs and National Parks

Sustainable tourism in our finest landscapes – Phase 1 project

1. Executive summary of the desk-top research carried out by Tourism South East

The South East Protected Landscape Group contracted Tourism South East to undertake a comprehensive review of all visitor research in the South East Protected Landscapes to provide descriptive, attitudinal and behavioural information about visitors to the region's protected landscapes. Post code data profiling was also requested to enhance knowledge about visitors and identify future target markets. From this review we are able to establish the following information.

Visitor profile

The review reveals a number of 'core' features among the profile of people who visit the region's countryside. Those who visit the countryside are more likely to be day visitors, older adults, in employment, car owners, and from higher occupational grades (ABC1's). Most people also visit in the company of others, typically involving two people and will have visited the area on several previous occasions.

Key target markets

The top 10 market segments identified through the Mosaic profiling are:

E20 Golden Retirement	G29 Footloose Managers
B10 Parish Guardians	B08 Dormitory Villagers
C11 Squires Among Locals	B06 Yesterday's Captains
B07 Distinctive Success	B09 Escape to the Country
A03 Business Class	F24 Garden Suburbia

E20 Golden Retirement and B10 Parish Guardians are represented by older people living active, independent and comfortable lifestyles, including some of the wealthiest in the retired population. Leisure time is spent walking or participating in other country pursuits and travel is also popular.

Types C11 Squires Among Locals and B07 Distinctive Success largely represent the wealthy family market made up of relatively well off families or couples who live in rural or semi-rural settings and who take several expensive holidays a year, often to exotic foreign locations. Types C11 are more country orientated and enjoy shooting, fishing and going for walks.

Types B07 are high profile careerists who enjoy exclusive holiday, often having a holiday home at the place they visit regularly. Types A03 Business Class B06 and B08 Dormitory Villagers typically represent the empty nester market, with Types A03 and B06 characterised by well off couples in their 50's or 60's with substantial disposable incomes while Type B08 are typically middle class married couples, with adult children and whose lifestyles are a mix of domestic fun and outdoor pursuits, enjoying many sporting activities.

Types G29 Footloose Managers represent a good target for upmarket, mainstream brands which express significant lifestyle and technology values (high internet users). Personal ease and comfort are important considerations when it comes to taking a day trip or holiday. Whilst there is a strong desire for quality and personal service,

Footloose Managers are comfortable with an easy going, informal service style. The final key market segment is Type F24 Garden Suburbia. Typically Garden Suburbia have both the time and the money to make well informed decisions, they buy on the basis of quality of service and reliability and are prepared to pay a premium for convenience. The Internet will be used to check on price comparison sites as well as for entertainment and people are happy to purchase online and by telephone.

Key trip features:

Overnight market small but potential for growth

The vast majority of visitors are local residents and day visitors from home. The overnight market is relatively small representing around 2% to 4% of the overall tourism market and the vast majority of holiday-makers and those visiting friends and family in the area are domestic visitors. Last year (2009) there was strong evidence of a surge in holidaying at home, the so-called 'staycation boom', as UK consumers' concerns over the recession mean more abandon foreign holidays and stay in the UK instead. For many, this has led to a rediscovery of UK's heritage and landscapes, and coupled with a preference for camping or staying in caravan parks and self-catering cottages, these developments should benefit countryside locations.

Walking the most popular activity

Among the variety of outdoor pursuits available to visitors, walking is the most dominant activity engaged in and is more often than not cited as the main reason for the visit. Visitor also place significant importance to the flora and fauna of the place and its tranquillity, attributes which can be enjoyed more fully when walking.

Use of formal pre-trip information source low

The majority of visitors will have visited on several occasions before and therefore the use of marketing literature such as brochures/leaflets and destination websites to inform the planning of trips was found to be low. If pre-trip information was consulted, it usually involved maps to provide directions to places.

Use of formal pre-trip information source low

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Ease of convenience and perceived lack of alternatives makes car the main mode of transport

Despite growing concern among the public about ecological issues and a greater appreciation of the country's natural assets, most people still travel to and around the countryside by car. However, there is some evidence that many people would chose public transport but feel these are inadequate and therefore that the car is the only viable form of transport available to them.

Visitors make a significant contribution to the local economy

The direct economic value of tourism activity in the South East is approximately £10.5 billion and supports over 300,000 jobs in the region. Drawing on data from the national tourism surveys, it is estimated that trips to the region's countryside which will include the 10 Protected Landscapes, contribute £403 million through overnight trip expenditure and £1.35 billion through day trips expenditure.

2. Executive summary of consumer research carried out by Responsible Travel

The survey was conducted in January 2010 by One Poll on behalf of Responsible Travel Ltd. It was done online from January 5th-13th and there were 2015 respondents in total – 41% from London and 59% from the South East and a fairly even gender split.

There is clearly a very strong level of interest in taking a break in the SEPLs – with 84% of people interested in a trip including an overnight visit. Given the population of London and South East England, this high figure strongly suggests that if only a small proportion of this translated into business it would provide very significant incomes to local communities and help support the conservation of natural and cultural heritage.

The majority (61%) prefer to stay in a place offering activities/experiences rather than just looking for a place to stay (39%). However 50% of people preferred to book accommodation in advance but choose activities and things to do when they arrive. Only 8% would prefer to book a package of accommodation and activities.

This reflects a desire for people to have the time and flexibility to just relax as well as to take part in activities and experiences, and presents a challenge to those organising the activities to ensure space is available for those choosing them at the last minute.

Some strong themes came through as to the type of break most people were looking for including; food and local produce; historic houses; gardens and sites; wildlife and nature; and walking routes. Specific products that matched these themes scored best; however, as with the experience of Responsibletravel.com, it is possible that with marketing targeted to audience niches other types of product could also do well. More experiences suitable for families were requested, as were those around arts & crafts and nature.

The area that without doubt created the most feedback was the concept of group travel. This strongly polarised people, with the majority finding it off putting (20% said that they would be prepared to book a group trip, 34% said they would not). If groups are to be successfully marketed then they need to be very carefully thought out and marketed. Specific issues and concerns are raised in the report.

Data splits showed a slightly stronger interest in the activity/experience themes and the specific products from those living in Greater London than those outside, although both were strong.

Age splits show a clear preference for different products by different age groups, and this can be of help for product and marketing planning. People who travel alone showed unique preferences, whilst there were fewer differences between different group types (travelling with partners, families or in a group with friends).

3. Conclusions of the product development programme report produced by The Tourism Company

The response to the project from both the Protected Landscapes and tourism enterprises has been overwhelmingly positive. We have identified significant support and enthusiasm for being involved in this project from a wide range of individuals, enterprises and organisations.

All the Protected Landscapes have shown interest in the project, although the level of commitment has varied and for some this is new territory. Any reluctance has generally been driven by lack of resources rather than lack of interest. All see the potential for raising awareness of the special qualities of their area and their work, developing better relationships with their businesses and raising people's game.

There are, however, some resource implications for the Protected Landscapes in driving this forward in the next stage of the project which will need to be addressed. The enterprises themselves welcome the idea of developing closer working relationships with the Protected Landscapes, see this as an opportunity to develop better networking locally with other like-minded enterprises and value the idea of being part of a wider initiative with a bigger impact. We have already exceeded the original target of 75 participants but the degree of enthusiasm and response to the workshops suggests to us that there is potential to recruit considerably more enterprises in the next stage of the project.

We have identified 27 products all of which have attracted some support from enterprises and which look capable of forming the core of the Phase 2 programme. They will, however, require further development and refinement in the next Phase.

In all, 111 enterprises have formally indicated their commitment to Phase 2 of the project by completing a form about their performance and future intentions. In terms of measuring baseline performance we have recorded information for a range of measures. In summary:

- About half of the enterprises provide accommodation but there are a wide range of enterprises involved.
- The vast majority are small, employing an average of 5-6 FTE staff
- The majority of the accommodation enterprises are quality graded. Average occupancy is around the regional average and business is relatively buoyant.
- Over half of the respondents have no previous experience of working with others to promote tourism packages.

These enterprises have shown strong support for the project and expressed a willingness to invest both time and money in complying with, and furthering, the aims of the project. A majority have indicated that they are prepared to:

- Invest time in working collectively to develop and deliver the project;
- Improve sustainability and environmental impact of individual enterprises;
- Improve quality and level of service of individual enterprises generally and to specific groups;
- Spend time receiving training on local area knowledge and environmental management.

In addition enterprises have put forward a range of practical ideas and proposals for their involvement which suggest that they have given it serious thought. In the light of this, and the feedback we have received, we believe there is every indication that the project will be capable of attracting the necessary support and commitment to succeed. Having said this, the project is still at an early stage. Success will require more work to be done in Phase 2 to refine the products, develop and cement relationships with enterprises and work out the fine detail of how the project will operate and be carried forward.

The list of themed short-break products for all 9 protected landscape areas

Product	Description
CHILTERNNS	
Easy access breaks	Short break packages for those with limited mobility or wheelchair users. focussing on the Princes Risborough/Wendover/Tring area.
Walking breaks	Self-guided, 2 day walking breaks starting and finishing in the market towns of Princes Risborough, Tring, or Wendover..
Cycling breaks	2 day, self guided cycling breaks along the newly created Chilterns Cycleway.
COTSWOLDS	
Cycling breaks	Cycling breaks centred on cycle routes in the Kingham area.
Conservation holidays	Short break packages which combine accommodation and practical courses to learn rural skills such as dry stone walling.
Green weekends	A package of 'green' themed activities, attractions and accommodation.
HIGH WEALD	
Vineyards	A vineyard themed break involving tastings, tours and demonstrations at local vineyards with links to visitor attractions in the area.
Bushcraft and forest crafts	A break with a menu of activities centred around survival skills, forest crafts and woodland ecology. There is an option to build your own shelter and accommodation
Cycling	A short break with a cycling theme based around family friendly cycling facilities at Bedgebury Forest and Bewl Water with cycle hire, itineraries and transport.
ISLE OF WIGHT	
Night Wight	Breaks with a range of activities taking place at night including observing the night sky, wildlife watching, night fishing and sunrise picnics.
Wight Rocks	Breaks with excursions and activities exploring the geology, fossils and dinosaurs of the Island.
Wight Inspiration	A series of arts-themed weekends/short breaks based on activities and arts inspired by and growing out of the AONB landscape
KENT DOWNS	
Elham Valley	A short break based on discovering the unspoilt villages and rolling landscape of the Elham Valley with options to book special activities.
Orchard experience	A short break centred on Brogdale, home of the National Fruit Collection, and an opportunity to enjoy activities and events at some of the nearby orchards..
First Light Coast and Countryside	A short break based on a special welcome to explore this unique location where the Kent Downs meets the sea with a menu of green activities on offer.
NEW FOREST	
Cycle New Forest	A break centred around a festival celebrating cycling in the New Forest with bike hire, guided rides etc
A Taste of the New Forest	A series of food themed weekends/short breaks celebrating New Forest produce including tastings, guided visits, demonstrations etc
Getting Close to Wildlife	Breaks, which will include a programme of experiences enabling consumers to experience, and learn more about the wildlife of the

	New Forest
NORTH WESSEX DOWNS	
Riding and racing	Packages aimed at those with an interest in horses and racing, involving visits to racing stables, ride a thoroughbred and recreational riding
Walking the Stones	Breaks offering a menu of guided walks around the pre-historic monuments such as Avebury in the North Wessex Downs.
Cycling tours	Breaks based in towns such as Newbury or Marlborough with bike hire and transport to off-road cycling using NCR 4 and Kennet and Avon Canal.
SOUTH DOWNS	
A Taste of the South Downs	Short breaks will combine stays in accommodation specialising in their use of local produce with visits to local producers, gourmet trails etc .
Mountain biking on the South Downs Way	An end to end mountain bike holiday with inclusive 'cycle-friendly' accommodation, cycle pick-up and drop-off or mountain bike hire.
Horse riding breaks	Short break for horse-riders who either wish to bring their own horse or hire a horse for a few days. Centred on the Midhurst / Petersfield area.
SURREY HILLS	
Get Active in the Surrey Hills	A short break comprising involves 'activity friendly' accommodation and a pre-booked menu of interesting, reasonably physical and exhilarating outdoor activities which people can choose from
Arts and Crafts	Accommodation plus organised visits to a number of the properties and sites associated with the Arts and Crafts movement in the early 20 th century.
Walk the North Downs Way	A place to place, self-guided walk along a stretch of the North Downs Way, accessible by public transport with luggage transfer and pre-booked accommodation.



**The European Agricultural Fund for Rural Development:
Europe investing in rural areas**



Appendix F Walking in the Cotswolds

Guided Walks Programme



The guided walks programme has been run by the Cotswold Voluntary Wardens for many years and it has become a well-established and popular walking programme in the AONB. During 2009/10, wardens prepared and led 277 walks which attracted 3,546 local people and visitors. The guided walks programme is currently promoted via the following methods:

- Sixty thousand copies (50,000 in winter) of the biannual Cotswold Lion newspaper distributed at shows and via TICs, libraries, attractions, etc.
- Cotswolds AONB website events and guided walks pages.
- Press releases issued prior to the beginning of the new walks programme
- 'Calling cards' handed out by wardens
- Some local promotion carried out by individual wardens eg posters in shop windows.

A survey of participants in guided walks was conducted during 2006. This survey made the following conclusions:

- The majority of people attending the walk were white, British retired people who travelled between 10 and 20 miles by car.
- Most of the walkers were female, between 50 and 80, retired, alone or with a partner/friend and came on the walks for company and to learn about the area.
- The majority had been on at least 5 walks before.
- The retired women were most likely to favour the walks for safety.
- The most important publicity for the walks was the Cotswold Lion.
- The guided aspect of the walk, in terms of being led and given useful information about the area was a key attraction of the walks.
- Most felt that the walks could not be improved in any way but some would like more longer walks.

The walks programme is being further developed to try and reach out to a wider audience.

Walks on Wheels



Walks on Wheels is a series of fifteen short, flat routes throughout the Cotswolds AONB that can be explored by users of wheelchairs, power scooters and children's buggies.

Taking in some of the Cotswolds' best scenery and attractions, the walks help people to enjoy and explore quiet, accessible country paths, villages and market towns.

The Cotswolds' highest point at Cleve Common, the prehistoric Rollright Stones, a magnificent aqueduct and classic Cotswolds market towns are just some of the walks' highlights and attractions.

All of the routes have been tested by disability and access groups from across the Cotswolds and have been carefully chosen to ensure that they are appropriate for users.

The project was devised by the Cotswold Voluntary Wardens in 2008 to mark 40 years of helping to improve access to the Cotswolds and conserve its landscape. Due to their popularity, more routes are being devised by the wardens.

Cotswold Way Circular Walks



The Cotswold Way National Trail stretches 164km (102 miles), following the Cotswolds escarpment from the World Heritage City of Bath in the south to the beautiful market town of Chipping Campden in the north.

The Cotswold Way is not just a long distance trail for long distance walkers. A short walk anywhere along its length will lead to beautiful landscapes, views and some of the best parts of the Cotswolds. To encourage more people to experience walking the trail in smaller sections, a series of short, easy to follow walks on and from the trail were designed by the Cotswold Way team.

Each route is designed to be as accessible and convenient as possible, following the same high quality standards as the main National Trails. The routes are aimed at walkers of various abilities and are graded accordingly. They are accessible by public transport, way-marked throughout, include car parking and refreshment stops, and most contain optional short-cuts making them suitable for a much wider audience such as less-experienced walkers, families etc.

The series of 12 routes were featured monthly in Cotswold Life magazine and are all available to download from the Cotswold Way website, free of charge. They have been extremely popular since they were launched and more routes are being planned.

Explorer Walks

Explorer Walks are a series of 10 walks in the north Cotswolds area based around Bourton-on-the-Water, Burford, Chipping Norton and Stow-on-the-Wold. They are suitable for all ages and abilities and are designed to enable people to get to their starting point using public transport and enjoy the leisurely walk back.

The walks aim to help all people explore the quiet and hidden charm of the Cotswold countryside including houses and manors, springs and ancient woods, plus National Trust sites and properties.

All walks are available to download from the AONB website.

Miles Without Stiles

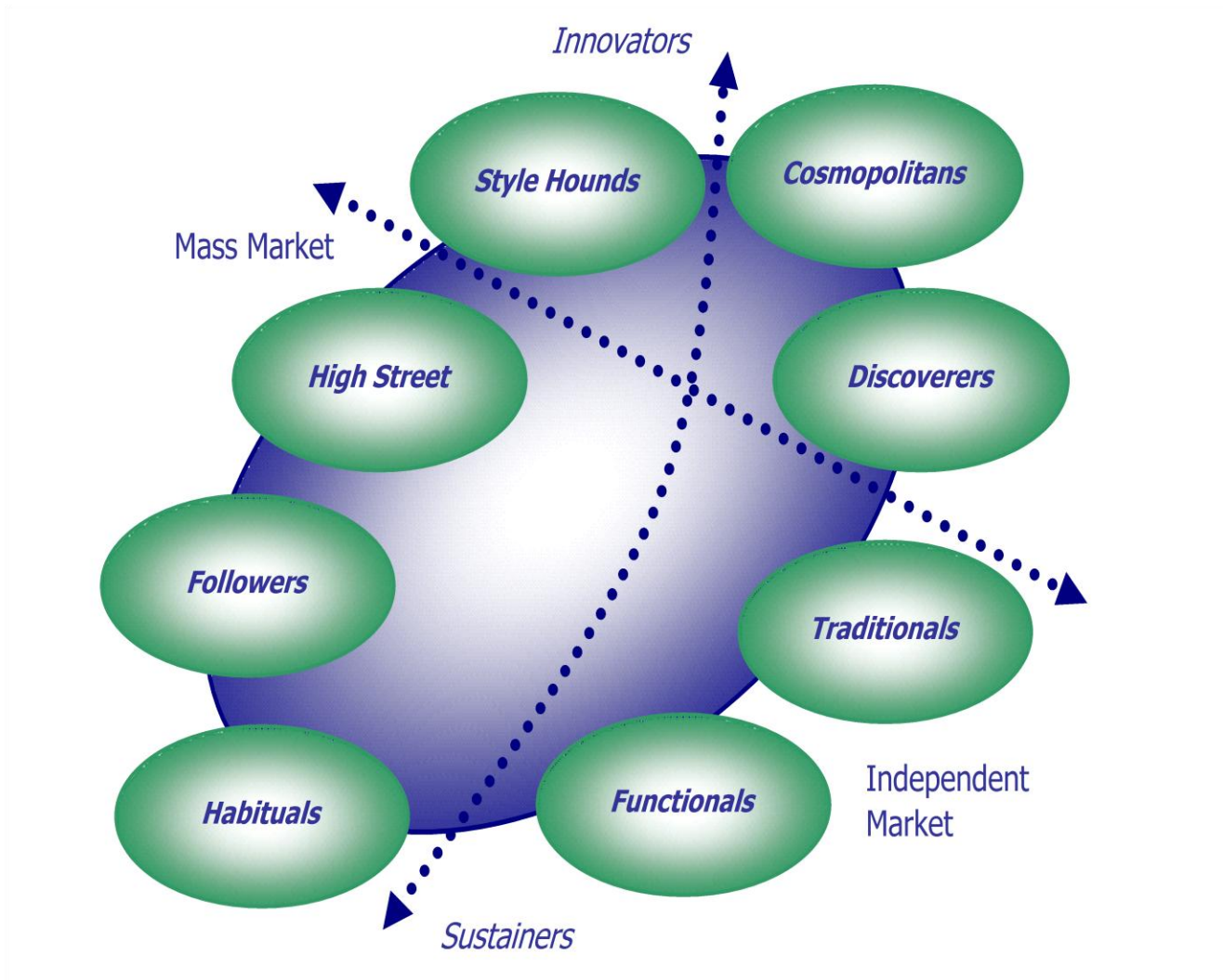
Miles Without Stiles is a series of 30 walks throughout the AONB which have been specifically designed by the Cotswold Voluntary Wardens to avoid difficult routes and those with stiles to enable more people to easily participate in walking in the Cotswolds.

The walks were compiled in booklet form some years ago and were considered very popular by those who used them as well as by staff at tourist information centres.

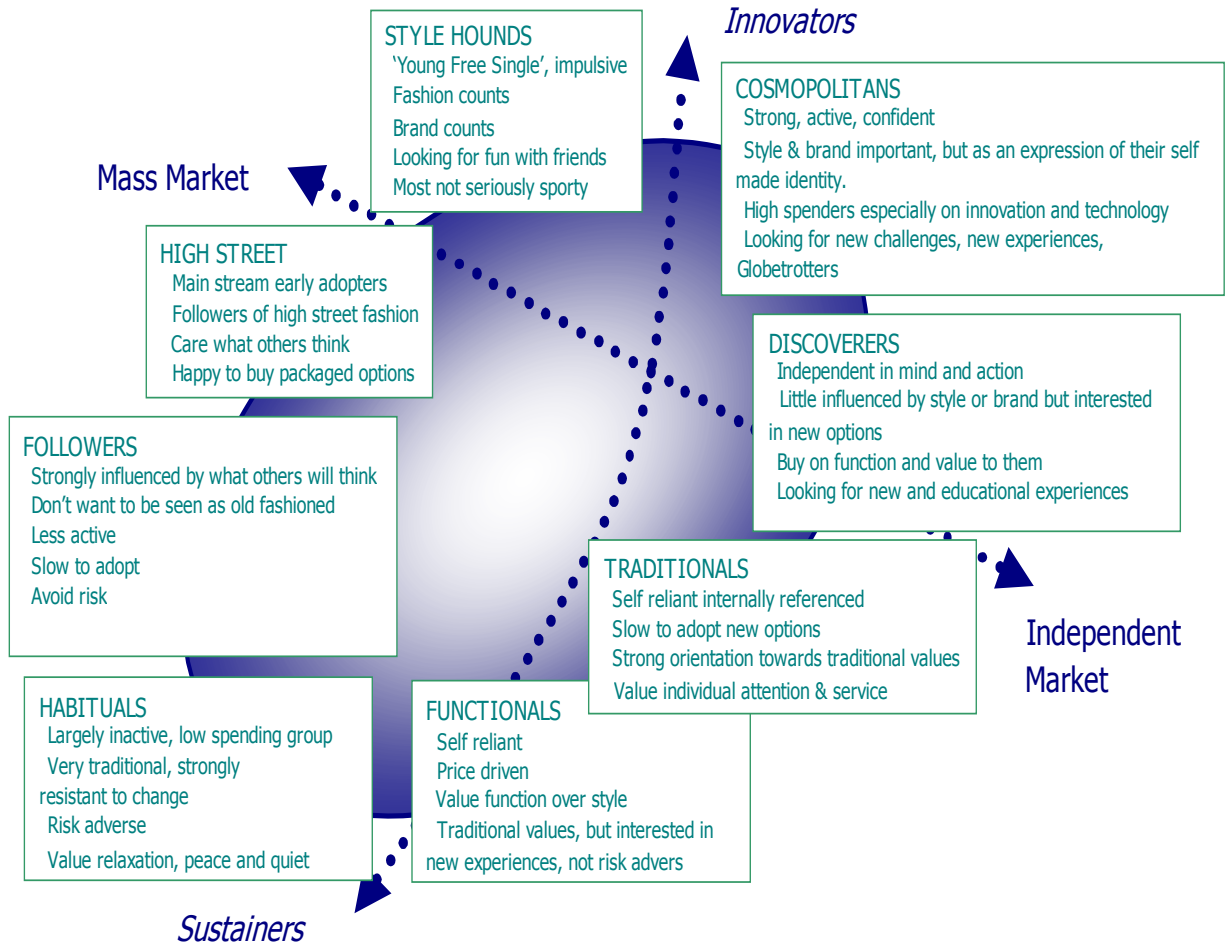
The Voluntary Wardens are currently considering a review of the walks so that they can be amended where necessary and made available to download from the AONB website.

APPENDIX G

The ArkLeisure® Model



The ArkLeisure[®] Model







Cotswolds

Area of Outstanding
Natural Beauty



Cotswolds Conservation Board

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Northleach

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