



Background

Uncover the Cotswolds was a year 3 (2018/19) & year 5 (2020) VisitEngland Discover England Funded (DEF) project, led by Cotswold Tourism alongside the Forest of Dean and partners from the wider Cotswold Tourism Partnership.

Responding to the evidenced demand for the Cotswolds as one of the UK's best known destination brands and most highly sought after English experiences, yet recognising the relative dearth of product or experiences in the region that were actually bookable or truly travel trade market-ready, the project delivered a programme of industry engagement and training alongside the development of a number of new bookable experiences that could be sold via the international travel trade and the increasing range of digital channels.

Strategically, there was also a need for the project to look beyond the established locations and traditional honey-pot sites within the Cotswolds. Importantly therefore, the project also sought to reveal and bring to market some of the lesser-known locations that are not commonly included in established itineraries yet offer truly distinctive and authentic experiences.

The initial project therefore helped to develop a number of new bookable products across both the Cotswolds and Forest of Dean AONB areas. Targeting the emerging & potential of Nordic, Italian and Spanish markets, a programme of trade engagement, product testing and sales have also been delivered, since 2018 with ongoing activity.

A new trade website is now the focus of trade activity for the region www.cotswolds.com/trade

The Covid pandemic had an immediate impact on all international travel from 2020 with many tour operators laying off knowledgeable staff, meaning post pandemic a total reset was required.

Recent trade work:

2022 saw the first-year international trade operators resumed trips to Britain. VisitBritain hosted recovery FAM visits which saw German operators come to the Cotswolds. With business support the destination was represented at Destination Britain North America to rebuild the critical USA links and interest was strong. This event was followed by a virtual Great West Way event and a hosted buyers visit to Westonbirt & Malmesbury area.

Relationships were established with DIT SW allowing a small bid Dec 22 for European Structural and Investment Funds allowing the destinations trade directory to be updated, research on international markets and progress with businesses being trade ready. The fund also enabled further trade show attendance including ETOA'S BIM, Nordic marketplace and ExploreGB. Hosted visits as part of Showcase Britain also enabled tour operators from Netherlands, North USA, Canada and Italy to meet local businesses and listen to destination presentations for both The Cotswolds and Forest of Dean.

The partnership remained a member of UKInbound and has now rejoined ETOA.

Results from a business survey conducted in January 23 compared to 2019 shows progress to now base 23/24 travel trade objectives on.

Local business survey 2019/2023: top line comparisons

- ▶ 90 businesses responded to the current survey request, 27 in 2019
- ▶ In the 2019 data, there was clear evidence that the majority of respondents considered their business to be wholly domestic, with only 15% considering international market engagement.
- ▶ Even within this small percentage, in 2019, respondent's knowledge of target markets was unclear, and broken down as follows:
30% US and Canada 19% Asian markets 22% Europe 1% Australia/New Zealand 52% could not specify an international market.
- ▶ The respondents to the 2023 survey have shown a huge leap in interest in the international markets (99%). This is broken down by market as follows:
82% US and Canada 38% Asian markets 62% Europe 50% Australia/New Zealand 32% Nordics 14% India 2% Gulf states 10% of respondents were unsure if they wanted to attract international business and 0.2% did not want to engage with international markets
- ▶ It is now evident that the recognition of the opportunity offered by international markets for individuals (FITs), leisure and MICE is strong.

- ▶ The emphasis on the domestic market as a key focus however remains; with a strong bias toward domestic holidays and direct business:
10% targeting day trips 86% want to be part of a domestic holiday itinerary 22% actively looking to work with tour operator partners 39% looking for international FIT business
- ▶ 29% actively targeting MICE business

Industry insights & trends

Recommendations: core industry insights 2023

- ▶ Tour groups are likely to remain smaller for the foreseeable future, even if numbers return to a 2019 level overall (which is likely to take at least another year, and regardless should be considered as an exception rather than a benchmark).
 - ▶ The key attributes of the smaller tours will be higher spending in return for more engaging experiences, at off peak/quieter times.
 - ▶ The current emphasis on engagement with more experience based products along with a wider variety of accommodation providers, with a minimum of 10 bedrooms for tour operator engagement will bode well for tour operators. The emphasis will be to ensure that businesses are 'trade friendly' as well as trade ready.
 - ▶ This will require a more fluid understanding and acceptance of changing numbers and more detailed requirements from tour operators, and extended seasonality.
 - ▶ For accommodation providers in particular, the emphasis will be on ensuring that a trade enquiry is not impacted by either direct sales or other dynamic pricing through consolidator platforms (e.g [booking.com](https://www.booking.com)). The essence of trade friendliness is honouring the price between enquiry and confirmation for an agreed period of time(usually 24 hours).
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- ▶ Historically hotels in the Cotswolds area have not worked well with the travel trade – focussing on direct bookings in high seasons, which has left a general sense of unhappiness based on the original research undertaken in 2019:
- ▶ “Currently, we are booking accommodation at [Thornbury Castle Hotel](#) and the Old Swan and Minster Mill. Oxford and Bath are the usual bases for [Cotswolds tours](#)”. **Angela Shanley Associates**
- ▶ “Our groups all stay in Cheltenham or Swindon as group accommodation is difficult to get within the Cotswolds. have some overnight experience using the Forest of Dean as a base.” **JAC Travel**
- ▶ The variety of accommodation opportunities now being targeted bodes well for a move from exclusively large hotels, to a more nuanced approach:
- ▶ “I believe hotels would make the packages too expensive and therefore she would rather include pubs, B&B and [similar](#)” **Cocktail**

- ▶ Sustainability remains a very high agenda item for international visitors, and this will be reflected in trade enquiries and bookings through OTAs
- ▶ The report from World Travel & Tourism Council, [Trip.com Group](#) and Deloitte reveals a heightened appetite for sustainable tourism.
- ▶ It found 69% of travellers actively seek sustainable travel options.
- ▶ ‘[A world in motion: shifting consumer travel trends in 2022 and beyond](#)’ shows that sustainability is an aspiration.
- ▶ Another survey also found that around three quarters of high-end travellers are willing to pay extra. Consumers were willing to stretch their budget, with 86% of travellers planning on spending the same or more. Nearly one third (31%) said they intend to spend more on international travel.
- ▶ Julia Simpson, WTTC CEO, said: “Sustainability is top of travellers’ agenda, and highlights the value they put on protecting nature.”

Objectives

Promoting Cotswolds Plus areas distinctive strengths & experiences to core international target markets. With a focus on FIT’s, sustainable travel and niche small groups.

Work to recover the international audiences that have not yet fully returned to the area following the pandemic, focussing on Northern European particularly during 2023/24 and continuing to build back the USA market.

Work with businesses to develop bookable trade ready product including accommodation providers including training. Look to hold a minimum of one training event for businesses a year.

Highlighting to businesses distribution options including TXGB, VisitBritain shops and destination websites to encourage more bookable product

Increase travel trade products being sold and distributed by domestic and international travel trade operators.

Attend min of 3 key travel trade events to promote the region to build back the Northern European market to 75% of pre-pandemic levels by December 2024.

Look to focus on USA & Nordics for 24/25 with decision needed by management board on when or if to retarget Asian markets. See appendix of potential shows

Supporting businesses to provide a welcoming and authentic visitor experience

Look for cross regional opportunities to target secondary markets such as Middle East with Shakespeare's England, Nordics or Asia with Visit West and linking as ambassadors for Great West Way.

Seek funding opportunities from private sector, Department for International Trade, county & local authority councils, and partners to ensure core trade and group focus can support the wider region.

Scope out a commercial model for trade & MICE focus across the Cotswolds Plus LVEP region with potential to seek commercial streams in Worcestershire and surrounding rural region.

Activities to be carried out 23/24/25

Activity	Expected Outcome	Responsible	Priority (1 Key to 5 low)	Cost of Activity	Provider(s)	Start date	Scheduled Completion Date	Actual Completion Date
<p>Seek funding opportunities to support trade activity for 23/24 and longer term to enable a dedicated focus. Travel trade works min 18 months in advance and relationship building is key.</p> <p>Asia market to be left for the moment to tick over with strong relationships built with Japanese operators, VB China & Japan but potential opportunity to build back with DIT keen to focus on this market.</p> <p>Funding sources</p> <p>DIT, Glos CC, Oxlep, LA's - any suggestions to bid?</p> <p>Part funded by Businesses</p>	<p>Business continuity and focus will ensure operators see the region as travel trade friendly. Opportunity for focussing accommodation in Cheltenham & Gloucester particularly.</p>	<p>Cotswolds Plus LVEP Reaching to County council</p>	1	<p>Seek an overall annual focus £30k min</p>	<p>DIT</p> <p>County councils</p> <p>LEP's</p> <p>Local authorities</p> <p>Private sector</p>	<p>June 23</p>	<p>ASAP to secure overall plan</p>	
<p>Establish a trade focussed virtual group</p> <p>Set up a new virtual sector group focussed on travel trade to engage directly with key influencers in the Travel trade sector in the wider region to ensure direct input & support of the overall travel action plan</p>	<p>Business input</p> <p>Bring together recent data research</p> <p>Refocus following Covid</p>	<p>Cotswolds Plus LVEP</p>	1		<p>Cotswolds Plus LVEP</p>	<p>July 23 – linking to LVEP application</p>	<p>Ongoing</p>	

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<p>Travel trade business as usual</p> <p>Responding to trade operator requests in a timely manner including introducing relevant businesses</p> <p>Updating VisitBritain overseas trade officers with content</p> <p>Supplying trade content to trade media including UKinbound & ETOA</p> <p>Keeping www.cotswolds.com/trade up to date</p> <p>Officers to keep product knowledge updated and look to train up new partners in region</p>	<p>Business continuity and reliability. Ensure operators see the region as travel trade friendly with current information. Cascade information to new officers longer term</p>	<p>Cotswolds Plus LVEP</p>	<p>1</p>	<p>Officer time approx 1.5 days per week</p>	<p>Cotswolds LVEP trade leads time</p>	<p>April 23</p>	<p>Ongoing</p>	
<p>Trade website improvements</p> <p>Provide better travel information for operators to arrive by rail including suggested itineraries</p> <p>Provide suggestions for emerging themes & regular requests such as wellness, aviation, history, local experiences</p> <p>Funding sources</p> <p>Core Budget Cotswolds Plus</p> <p>BID made to GWR community fund (May 23) for mainly domestic consumer focus but small amount for trade collateral</p>	<p>Ensure operators see the region as travel trade friendly with current information reaching into wider region</p>	<p>Cotswolds Plus LVEP</p>	<p>2</p>	<p>Officer time to bring together</p>	<p>Cotswolds LVEP trade leads time with others to feed content in</p>	<p>August 23</p>	<p>Ongoing</p>	
<p>Training</p> <p>Follow up from the business survey with businesses keen to learn more about travel trade to signpost training.</p> <p>Seek demand for holding Taking England to the World course or local course as well as focussing on importance of welcome. Look to hold suitable virtual meetings which</p>	<p>Better educated businesses & more travel trade product</p>	<p>Cotswolds Plus LVEP</p>	<p>2</p>	<p>£1000</p>	<p>VisitBritain And Cotswold Tourism Officer time</p>	<p>June 2023</p>	<p>31/03/2024</p>	<p>Enter date</p>

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<p>could involve setting up a trade group or learning from GWW trade group</p> <p>Funding sources</p> <p>Core Budget Cotswolds Plus</p>								
<p>Promotion & trade relationships</p> <p>Attend key trade shows both virtually and in person to maximise promotion of Uncover the Cotswolds products to the Travel Trade. Ideally look to attend key event such as World Travel market (Nov 2024), Vakantiebeurs, Netherlands (Jan 2024) or ITB Berlin (Mar 2024) alongside VisitBritain</p> <p>For trade events in 2025 review Destination Britain North America & Nordics to reinforce relationships built in 22/23</p> <p>Seek to attend a min of one domestic group trade event such as Best of Britain & Ireland or Excursions</p> <p>Funding sources</p> <p>ESIF funding/ Strategic partners/LEPs ?</p>	<p>Look to generate a min of 20 new leads from B2B meetings & maintain min 20 existing relationships per show. (will differ per show)</p> <p>Contacts across the travel trade updated and kept up to date with regular update emails. By attending events it can give exclusive event / FAM opportunities with UKInbound / Visit Britain.</p>	<p>Cotswolds Plus LVEP</p>	<p>2</p>	<p>£10K min annually for overseas</p> <p>£4k min annually for domestic shows</p>	<p>VisitBritain/ UKInbound / House of Britain</p>	<p>Autumn 23 – March 24</p>	<p>31/03/2025</p>	<p>Enter date</p>
<p>Promotion</p> <p>Develop more product on the trade website both accommodation and experience led. Trade officers led engagement with suitable businesses from across the region to be actively showcased to operators via the regular travel trade newsletter and operator meetings.</p> <p>Funding sources</p>	<p>Keep product on the trade website current and relevant alongside increasing new products. Look to add a min of five new products onto the trade website.</p>	<p>Cotswolds Plus LVEP</p>	<p>4</p>	<p>Officer time & business time</p>	<p>Private Businesses & trade officer's time</p>	<p>April 23 ongoing</p>	<p>31/03/2025 & ongoing</p>	

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Core Budget Cotswolds Plus								
Virtual workshop (or at a in person forum) focussed on bookable opportunities from TXGB & VisitBritain shop/Lottery tickets Funding sources Core Budget Cotswolds Plus	Highlight case study biz to membership on those already using TXGB/VB shop before holding a virtual workshop or in person at forum	Cotswolds Plus LVEP	4	Officer time	TXGB officer/VB officer / partners sending out to membership	Autumn 23 ongoing	31/03/24 & ongoing	
Promotion and trade relationships Attend VisitBritain Marketplace in Spain or Nordics 24/25 to promote Forest of Dean and Wye Valley Tourism and Uncover the Cotswolds direct to Buyers. Funding sources ESIF Funding ?	20 new leads generated direct in Market for the Spanish or Nordics. Products actively promoted in follow up emails.	Cotswolds Plus LVEP	5	£2000	VisitBritain / ETOA	Autumn 23	31/03/2025	Enter date
Data, research, shows & training Continue membership of both ETOA & UKInbound to gain access to research and buyers details for the Travel Trade and virtual & in person trade events. Funding sources ESIF Funding ?	Promotion through ETOA / UKInbound networks. Research on overseas markets accessed and used to inform marketing practices in 2024. Useful training webinars for staff	Cotswolds Plus LVEP	3	£4000	ETOA	05/01/2023	05/01/2025	Click here to enter a date.
Commercial model	Bring a coherent & consistent approach to biz	Cotswolds Plus LVEP	3	Officer time & £250 for		Autumn 24 to launch	Ongoing	

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<p>Look to research and establish a commercial trade/mice membership model for Cotswolds Plus LVEP to launch fully 2024/25</p> <p>Funding sources</p> <p>Core Budget Cotswolds Plus LVEP</p>	<p>engagement with biz paying for service.</p>			<p>design rate card</p>		<p>Jan or Mar 25</p>		
<p>Business progress</p> <p>Conduct annual survey Jan 24 & audit of Cotswolds LVEP businesses to see who has taken steps to be travel trade ready as a business in 2023 to work with overseas tour operators and if there are any businesses identified who could consider exporting goods longer term.</p> <p>Funding sources</p> <p>Cotswolds Plus LVEP Core Budget</p>	<p>4 businesses identified to work towards travel trade ready and listed on the trade website</p> <p>Potentially identify 1 business interested in starting to work with Department of International Trade to consider exporting goods longer term</p>	<p>Cotswolds Plus LVEP</p>	<p>4</p>	<p>£2000</p>	<p>South West Research Company</p>	<p>05/01/2024</p>	<p>31/12/2024</p>	<p>Enter date</p>
<p>Promotion and trade relationships</p> <p>Encourage FAM visit to the region from either USA or North European markets with VisitBritain</p> <p>Look to scope a FAM visit focussed on sustainable travel methods using train, Blenheim shuttle & others that allow operators to see how using public transport can work</p> <p>Funding sources</p> <p>Core Budget Cotswolds Plus LVEP</p>	<p>Look to host a trade operator visit to the region encouraging visits to trade friendly locations. Host dinner with presentations</p> <p>Look to enable to sustainable travel focus to the visit.</p>	<p>Cotswolds Plus LVEP</p>	<p>4</p>	<p>Look to work with VB & private sector to min cost to £5k</p>	<p>VisitBritain overseas VB officers & private sector Could work with GWW</p>	<p>Autumn 23 or 2024</p>	<p>31/12/2024</p>	

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<p>Promotion & adaptation</p> <p>Adapt to new trends and niche markets from operators to design suitable suggested itineraries focussing particularly on sustainable & wellness trends.</p> <p>Funding sources</p> <p>Core Budget Cotswolds Plus LVEP</p>	<p>Design min of two new itineraries for trade operators</p>	<p>Cotswolds Plus LVEP</p>	<p>4</p>	<p>£600</p>	<p>Artworks for design</p> <p>New niche itineraries</p>	<p>Winter 23</p>	<p>31/12/2024</p>	
<p>Promotion and trade relationships</p> <p>Attend any virtual free VisitBritain events such as ExploreGB to promote Cotswolds Plus region</p> <p>Funding sources</p> <p>Event is usually free but officer time required including to reply to operators</p>	<p>20 Travel Trade leads as min for each event</p>	<p>Cotswolds Plus LVEP</p>	<p>2</p>			<p>15/03/2023</p>	<p>31/12/2025</p>	
<p>Promotion</p> <p>Update images for Uncover Cotswolds Travel Trade Image Library to include additional focus on Gloucester, Cheltenham, new Tewkesbury outlet centre as well as trade friendly products</p> <p>Funding sources</p> <p>Partners Core Budget</p>	<p>100 new images of key destinations and travel trade ready businesses to be uploaded</p>	<p>Cotswolds Plus LVEP</p>	<p>4</p>	<p>£750</p>	<p>Tourism officers Time in each location to supply & Cotswolds LVEP trade officer time</p>	<p>01/05/2023</p>	<p>31/12/2025</p>	
<p>Create upto four Travel Trade newsletters annually using Uncover Cotswolds Travel Trade database throughout year to update operators on new product, key changes including</p>	<p>Trade database stands at 680 contacts (April 23) emailed with the latest news</p>	<p>Cotswolds Plus LVEP</p>	<p>3</p>	<p>£200</p>	<p>1 day Cotswolds Tourism Time</p>	<p>05/05/2023</p>	<p>31/12/25</p>	

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<p>Bourton coach parking and encourage booking appointments at events. Help to keep Cotswolds & wider region in mind of operators as they develop new itineraries and build back international visits</p> <p>Funding sources</p> <p>Cotswolds Tourism Core Budget via mailchimp</p>	<p>and opportunities for working with businesses in Forest of Dean and Wye Valley, Cotswolds and Gloucestershire</p>							
<p>Establish closer commercial approach with Visit Worcestershire to act as regional trade focus by training staff, business engagement and encouraging business promotion on www.cotswolds.com/trade</p> <p>Funding sources</p> <p>VisitWorcestershire Partner contribution to expand offering to key VisitWorcestershire businesses & key VisitWorcestershire businesses</p>	<p>Support trade focus across wider rural region</p>	<p>Visit Worcestershire Cotswolds Plus LVEP</p>	<p>4</p>		<p>Cotswolds LVEP trade leads time</p>	<p>Winter 23/24 onwards</p>		
<p>Review destinations attendance at domestic group shows and appetite from businesses to resume this to help benefit the wider region either by working in partnership or offering stand sharing opportunities ourselves.</p> <p>Funding sources</p> <p>Core Budget Cotswolds Plus LVEP/ Private sector covering costs of shows</p>	<p>Support local businesses to reach domestic group operators to ensure attractions continue to attract a range of visitors all year round.</p>	<p>Cotswolds Plus LVEP Potentially with VisitWest / GWW</p>	<p>2</p>	<p>£4000</p>	<p>Cotswolds LVEP trade leads time</p>	<p>05/05/2023</p>	<p>31/03/2025</p>	

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<p>Aspiration to conduct direct to consumer marketing campaign delivered into the Northern European market subject to funding through Facebook advertising in spring 2024 or working with VisitBritain or specialist operators such as House of Britain or DFDS</p> <p>NOTE THIS WOULD REQUIRE BIDDING FOR FUNDING</p> <p>Funding sources</p> <p>ESIF Funding?</p>	<p>Increased overnight stays from overseas visitors measured through business survey to accommodation providers.</p>	<p>Cotswolds Plus LVEP</p>	<p>5</p>	<p>£3000</p>	<p>Digital Media Provider / VB / Operators</p>	<p>01/03/2024</p>	<p>31/03/2025</p>	<p>Enter a date.</p>
<p>Engage with VisitWest to work together on Asian markets focus in 25 onwards subject to management board consideration on long haul markets</p>	<p>Recover Asian market</p>		<p>5</p>			<p>2024/2025</p>		

Appendix Potential shows held annually

<https://www.etoa.org/events/>

<https://www.visitbritain.org/proposed-events-programme-2023-24>

Trade events being considered	Details	Estimate cost	Dates	Resource required / poss stand share
VB Destination North America		5k & travel & Acc (£8	7-9 September	
UK Inbound convention	Glasgow		20 - 21st September	
VB Spain trade	Spain - multi city networking	£1k + travel/Acc		Chris does speak Spanish
World Travel Market	London - part UK Inbound stand/ Sta	£6K ?	6-8 November	2 people min
Great West Way Market Place	Hybird event - virtual opportunity	£500?	Mid November	
Vakantiebeurs, Netherlands	Utrecht Netherlands	£4k?	11 - 14 January 2024	2 people min
ETOA Best of Britain & Ireland	London		£1 End Jan 2024	
VB Nordics marketplace	Nordic location		Mid Feb 2024	
ITB Berlin	Berlin Germany	£5k travel & Acc	5 - 7 March 2024	2 people min
ETOA Market Place virtual USA or As Virtual so could be worth checking out			Nov 23 Asia Mar 24 USA	
Domestic related group focussed shows				
Group Leisure	Milton Keynes			Oct-23 Berkeley castle stand shared with GWW
Excursions	London			Jan-24 GWW attend Berkeley castle & WWT stand shared with VisitWest. Cotswold Farm park potentially keen
British Tourism & travel show	Birmingham		20 - 21st March 2024	
Consumer focussed show				
Destinations show consumer focussed	Manchester & London		11 - 14 Jan 24 Manchester 1 - 4 Feb 24 London,	
Luxury travel fair	London		2 - 5 Nov 23	
Camping & Motorhome show	Birmingham			Feb-24 Uncover Britain roadtrips have attended