

England's Economic Heartland Board

24 September 2026

Item 8: Visitor Economy Action Plan

It is recommended that the Board:

a) Notes the progress on development of a regional visitor economy action plan.

1. Purpose of the Report

- 1.1. To provide the Board with an update on the progress that is being made on the development of a visitor economy action plan.

2. Key Points to Note

- 2.1. The region already has a strong visitor offer. The next decade, including the arrival of East West Rail and Universal Studios, will provide significant opportunities to further grow it.
- 2.2. Recognising the need for specialist support, EEH has commissioned Experience Oxfordshire and the Placemaker to create a visitor economy action plan for the Oxford-Cambridge Growth Corridor.
- 2.3. It is being developed in partnership with local visitor economy partnerships (LVEPs) and local authority economic leads across the corridor to achieve a co-created approach that will ensure local ownership.
- 2.4. Some of the emerging themes and analysis from the work are discussed below – including around connectivity, skills, and the importance of the overseas business market, driven by the region's strengths in science and technology innovation.
- 2.5. EEH is also utilising its extensive data library to add value to the work being done by consultants, including mapping of attractions and green spaces.

3. Context

- 3.1. Research commissioned by EEH shows the Oxford-Cambridge Growth Corridor (taken to encompass the entirety of EEH's geography) already has a visitor economy worth almost £10bn, directly supporting 160,000 jobs (5% of all jobs).
- 3.2. The arrival of East West Rail and Universal Studios, alongside other upcoming or expected projects such as Puy Du Fou; Silverstone 2035; National Forest; Varsity Way; airport expansions; and high population and economic growth presents a once-in-a-generation opportunity to:
 - Use these changes in the Corridor as the catalyst for an enhanced visitor offer, creating new jobs and economic growth.
 - In doing so, improve the quality of life and lifestyle offer for existing communities.

In regard to the latter, a 2025 report by Visit England found significantly higher levels of community pride, sense of wellbeing and social cohesion amongst residents living and working in areas frequented by both domestic and international visitors. 58% of residents surveyed in these destinations felt connected to their community compared to 35% elsewhere.

- 3.3. As part of the East West Rail legacy programme, EEH commissioned Experience Oxfordshire, (a local visitor economy partnership – LVEP) and consultancy The Placemaker to produce a visitor economy action plan. There has been engagement with other LVEPs, destination management organisations (DMOs), local authorities and other stakeholders. Bringing these partners together across the region has been useful in of itself.
- 3.4. The work is being finalised and should be ready to present to the Board in December 2026. The sections below highlight some of the emerging findings and draft suggestions.
- 3.5. Once agreed, it is anticipated that the work will be shared with Government (notably DCMS and No 10 North/HMT), MPs and regional partners, and be used as a starting point for further conversations and funding bids. While EEH may not necessarily lead future work, it can play a useful convening role as required to move forward actions.
- 3.6. EEH’s work on integration can also use the evidence in the report, given that the first/ last mile of journeys is emerging as a key theme.
- 3.7. It is worth noting that on 10 September, Government announced that Mayors and leaders of Foundation Strategic Authorities will be handed the power to introduce an Overnight Visitor Levy – a fee on overnight stays – to reinvest into their communities.

4. Economic Impact of Tourism

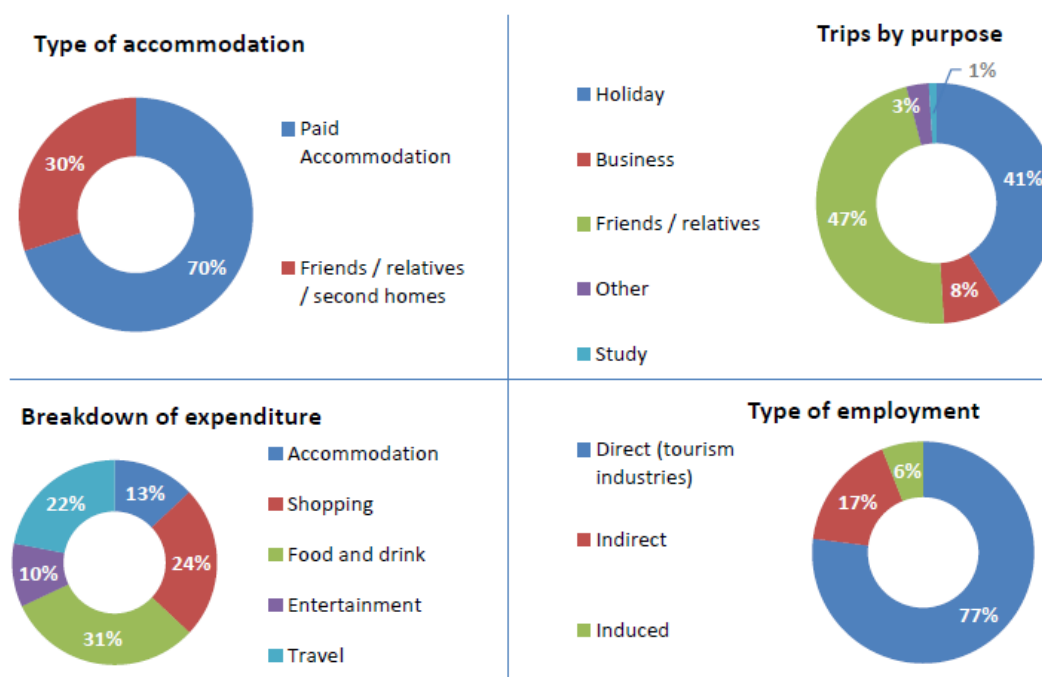
- 4.1. As part of this Visitor Economy workstream, a baseline analysis of the economic impact of tourism in the region was undertaken. Using the latest available data from 2024, the headline figures for the region are:

<u>Day Trips</u>	2024
Day trips volume	90,730,000
Day trips value	£3,677,968,000
<u>Overnight trips</u>	
Number of trips	11,580,000
Number of nights	45,127,000
Trip value	£3,529,763,000
Total value	£9,231,208,000
Actual jobs	157,716

The arrival of attractions such as Universal United Kingdom Resort will undoubtedly significantly alter these numbers.

- 4.2. The analysis also considered the types of trips being made, and a breakdown of visitor expenditure in the region:





5. Baseline insights

5.1. A draft SWOT analysis of the region's visitor's economy is in annex 1.

5.2. Insights by Experience Oxfordshire and the Placemaker so far include:

- Day trips in the region provide exceptional volume, while staying and overseas visitors create higher value per trip.
- The overseas business market is particularly valuable. This reflects the region's universities, science and technology clusters, major employers, conference activity and international business relationships.
- Four major airports (Luton, Heathrow, Stansted, Birmingham) sitting within or close to the region is a strength, and each has a different rail relationship.
- There is an opportunity to increase the proportion of day visitors who add a second activity, extend their visit into the evening, use local food and drink, or convert to an overnight stay. Transport integration and visitor information are central to this conversion, given they are key factors in determining whether additional movement feels practical.
- The quality and 'legibility' (i.e. information and access) of the complete visitor journey is a current barrier for the region's visitor economy. Attractions and accommodation must be visible from the point of planning; interchange must be manageable; onward public transport, walking, cycling, taxi and coach options must be clear; and the visitor must have a reason to make a linked journey.
- Without deliberate dispersal and destination readiness, benefits may concentrate in already strong anchors or immediate host locations.

6. Action plan themes

6.1. A draft version of the action plan is with stakeholders (LVEPs, DMOs, local authorities) for comment.



- 6.2. The plan will be amended in line with feedback received and a simple summary version will be produced that will be supported by a range of technical documents.
- 6.3. These will be presented to the Board in December 2026 (due to be held at Silverstone Museum), including practical actions to realise the ambitions below.
- 6.4. The current draft action plan identifies six key themes, alongside two cross-cutting themes. These are:

Visitor economy theme	Rationale and 10-year ambition
<u>Complete visitor journeys</u>	Rationale: strong strategic access is repeatedly undermined by interchange, last-mile, information, accessibility, service-span and booking friction; EWR is an enabling spine rather than a complete solution. Ambition: priority visitor journeys are easier to plan, buy and complete, with gateways and local modes working more coherently from the visitor perspective.
<u>Gateway capture & dispersal</u>	Rationale: airports, stations and major anchors generate demand, but access does not automatically create linked stays or wider spend; Universal UK will significantly increase visitors to the region and we need to capture and link these visitors to the wider visitor offer. Ambition: gateways and anchors act as springboards into a wider offer, with visitors to places such as Universal generating additional value to surrounding areas.
<u>Understand, Communicate and Convert Priority Markets</u>	Rationale: partners support collective communication, linked product development and targeted thematic or campaign propositions to extend value and add reach. Ambition: shared market intelligence guides selective joint campaigns, travel-trade activity, product development and gateway/transport communications while established destination brands remain visitor-facing.
<u>Prepare Destinations for Transformational Growth</u>	Rationale: Universal UK Resort and other attractions, EWR, gateway investment and regeneration will reshape accommodation, workforce, transport and business-readiness needs; readiness is uneven. Ambition: Accommodation, skills, visitor information, public realm, local transport and business readiness develop ahead of demand.
<u>Build Shared Evidence, Intelligence and Strategic Case-Making</u>	Rationale: Accommodation, visitor-flow, product and capacity data remain inconsistent; partners also want stronger shared case-making. Ambition: a live evidence and GIS platform, common indicators and a clear economic narrative support investment, transport and funding decisions without creating a burdensome reporting system.
<u>Accelerate Capability, Ownership and Delivery</u>	Rationale: destination-management capacity and resources vary significantly, while duplication is a genuine concern and appetite for practical peer support is strong.

Ambition: Regional coordination and shared tools, peer learning, clear roles and funding mechanisms widen participation and turn collaboration into deliverable programmes.

Cross-cutting theme

How it should shape delivery

Skills, workforce & business capability

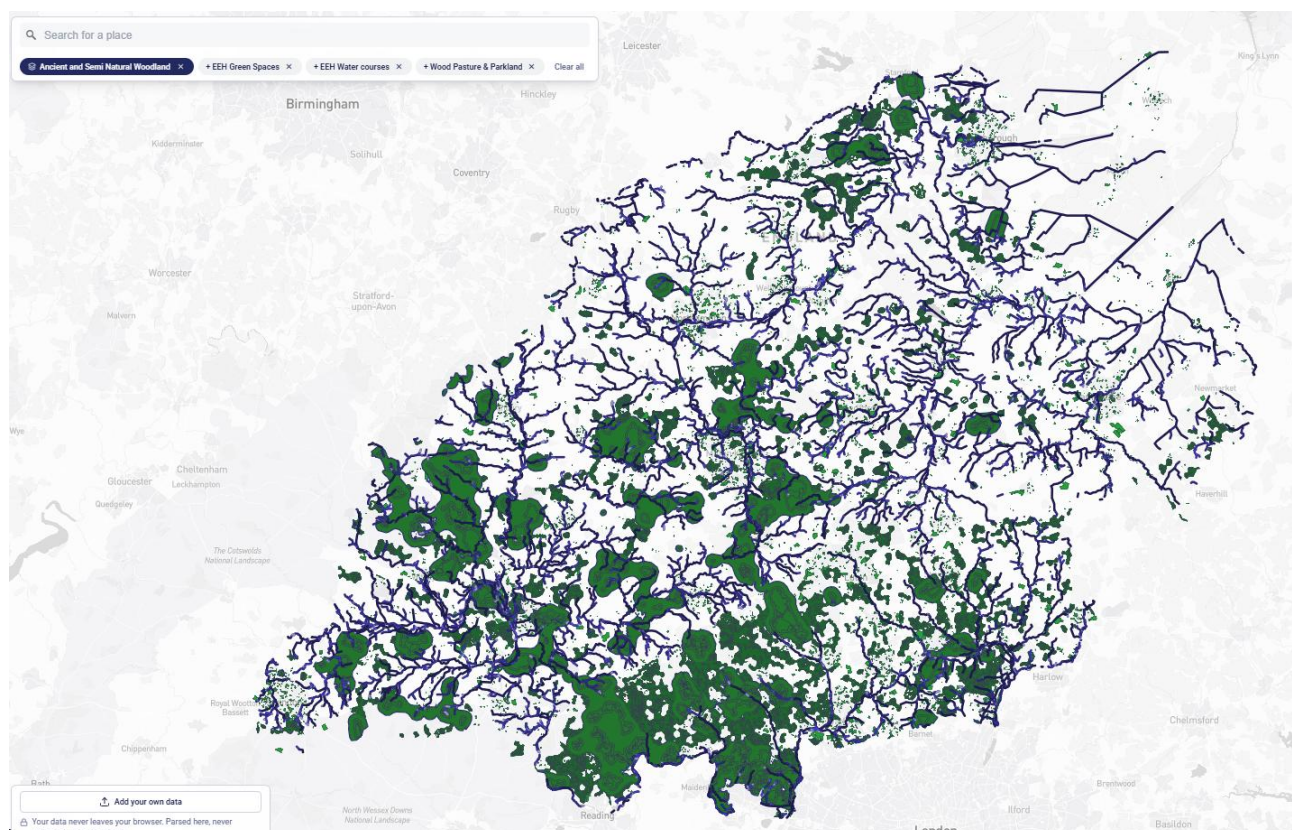
Future demand can be serviced locally; align employers, skills providers and destination partners early; consider recruitment competition, progression, business readiness and opportunities for local supply chains.

Sustainable, accessible, inclusive & community-positive growth

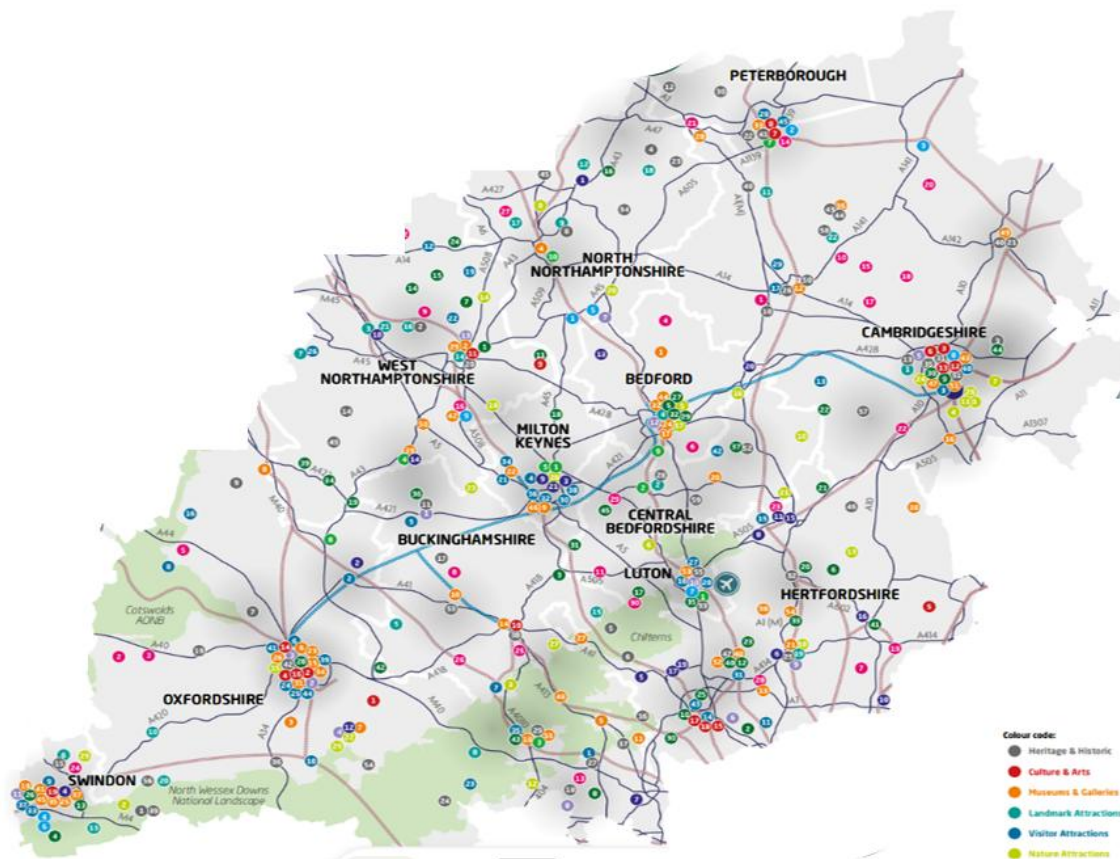
The end-to-end accessible journey, practical low-carbon travel, resident and community benefit, carrying capacity, place quality and social value. Growth should create value for host places as well as visitors.

7. EEH data

- 7.1. Running concurrently with Experience Oxfordshire and the Placemaker's work, EEH is utilising its data tools, connectivity expertise and mapping to provide additional insight into the visitor economy.
- 7.2. For example, the map below on our Data Hub GIS system (available via EEH's website) shows green spaces, ancient woodland, parkland and water courses. It can be interrogated down to street level, with layers added or removed as appropriate.



- 7.3. EEH has also compiled the locations of attractions in the region (with input from the stakeholders involved in the action plan). This is also available as a layer on the Data Hub and other useful layers can be added – for example, rail lines, rail station usage, bus data and roads.
- 7.4. In addition, we are developing a public facing graphic showing the location of attractions. The below is a draft version but gives an indication of how this may look.



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September 2026

Annex 1: Draft SWOT analysis of regional visitor economy

Strengths

- £9.231 billion total tourism value and nearly 158,000 supported jobs.
- High-value international and staying markets alongside very large domestic day demand.
- Two global anchor cities (Oxford and Cambridge) plus across the region an unusually diverse portfolio of heritage, culture, leisure, retail, countryside, screen, motorsport, events and business assets.
- Four major airport and international rail influences, and strong national road and rail connections.
- East West Rail and Universal UK create exceptional visibility and momentum. Eg, 1.7 million people will live within 10 miles of an East West Rail station
- Proximity and easy access to London & Birmingham.
- Unusually strong pipeline of transport, attraction, regeneration and cultural investment.

Weaknesses

- Day-trip volume is high but does not automatically convert into longer stays or broader dispersal.
- Day-trip volume does not automatically convert into longer stays, linked experiences or wider spend.
- East-west and last-mile journeys remain less legible than London-facing and north-south access.
- Destination-management availability, capacity, investment and evidence quality are uneven across the geography.
- Strong tourist attractions (anchors) can overshadow secondary destinations and the corridor itself is not a consumer-recognised geography.
- Accommodation supply, visitor-flow and product data are not consistently comparable corridor-wide.

Opportunities

- Use EWR and gateway investment to create more practical multi-place and rail-enabled journeys.
- Use Universal UK as a catalyst to strengthen regional visitor offer and spread value into surrounding places.
- Convert airport and anchor demand into overnight stays, secondary-destination visits and wider place spend.
- Build shared intelligence, investment cases and delivery tools where scale reduces duplication.
- Prepare accommodation, skills, products and visitor infrastructure before demand changes fully materialise.
- Use new services, access improvements and product development to build awareness of the corridor's connected visitor offer while retaining established destination identities.

Threats

- Major developments operate as self-contained destinations with limited local or regional spillover.



- Growth is concentrated in Oxfordshire, Cambridgeshire, London-facing routes or self-contained host sites.
- Infrastructure improves but information, last mile connectivity, product and destination readiness lag behind
- Accommodation, labour and transport pressures reduce service quality and displace existing demand.
- Airport proximity is overestimated while interchange and onward travel remain unresolved.
- Proposed schemes are delayed or altered, while strategies become dependent on uncertain delivery.
- Changing project, devolution and local-government arrangements make a static plan age quickly.
- Uncoordinated local activity competes for the same markets and scarce delivery resource without adding collective value
- No overall regional co-ordination will miss opportunities for maximising benefits of Universal and greater connectivity provided by East West Rail