

8.0 Tourism (map 6a and 6b)

8.1 Tourism trends

Tourism continues to be a significant economic driver. The river lies within the Tourism South East Region.

In 2004 the region attracted 16.6 million domestic tourist trips with a value of over £3,006 million, making it the second most visited of all the regions apart from London.¹ However, the South East has been losing market share to other regions.

Longer domestic holidays are declining whilst the trend for more short breaks looks certain to continue. The Thames, with 10.5 million people living within 30 kilometres of the river, is well placed to benefit.

The number of overseas visitors to the UK fell between 1998 and 2001 (with a 9 per cent fall in 2001, the year of the foot and mouth epidemic). There was steady recovery in 2002 and 2003. Then a 12 per cent increase made 2004 a record year

with 27.8 million visitors from overseas (with a further 5.5 per cent growth predicted in 2005).²

The South East Region, with 14.2 per cent of the UK total, receives the highest number of overseas visitors outside London. In 2004, 3.95 million visitors spent £1,467 million in the region. The river, with its proximity to the major UK gateways of Heathrow, Gatwick, Dover, Portsmouth and Southampton, is well placed to gain potential benefit from these overseas visitors.

The Thames is being developed as a significant brand for tourism.³ In addition, the historic towns of Oxford and Windsor, Henley and its regatta, and the areas of outstanding natural beauty (AONBs) are all recognised and valued as key tourism assets of the region.

The traditional river activities of boating and fishing provide a potential focus for promoting tourism.

Policy 3 - tourism

We will promote the Thames as a 'must visit' destination, developing it as a key brand within Tourism South East

Possible actions

- 1 provide up-to-date information that inspires people to visit the river
- 2 work in partnership through the River Thames Alliance Marketing Group
- 3 maintain, improve and publicise the www.visitthames.co.uk website
- 4 establish a brand identity for the River Thames
- 5 seek positive media coverage to raise the profile of opportunities on the river
- 6 publish up-to-date tourist information about the river, including camping, angling and boat hire
- 7 provide a telephone answering service about the river
- 8 maintain an atmospheric photographic image library
- 9 erect signs on bridges and main routes identifying the River Thames
- 10 support and promote events based on the river

¹ The United Kingdom Tourism Survey, 2004. The survey covers trips away from home lasting one night or more taken by residents of the United Kingdom for holidays, visits to friends and relatives, business and conferences. Tourism is measured in terms of volume (trips taken, nights away) and value (expenditure on trips).

² International Passenger Survey, 2004, Office for National Statistics

³ The Thames has been identified as a key brand within the Tourism Berks, Bucks, Oxon sub-region of Tourism South East.

The river faces strong competition from other destinations employing significantly greater marketing spend.

Case study 3



Marketing the River Thames

The River Thames Alliance has set up a marketing group to pool resources and develop coordinated actions to promote the river. The group is a partnership of private and public sector organisations including trade associations, local authorities, and attractions like the River and Rowing Museum, Henley, Tourism South East, Thames Path National Trails and the Environment Agency act as a steering group.

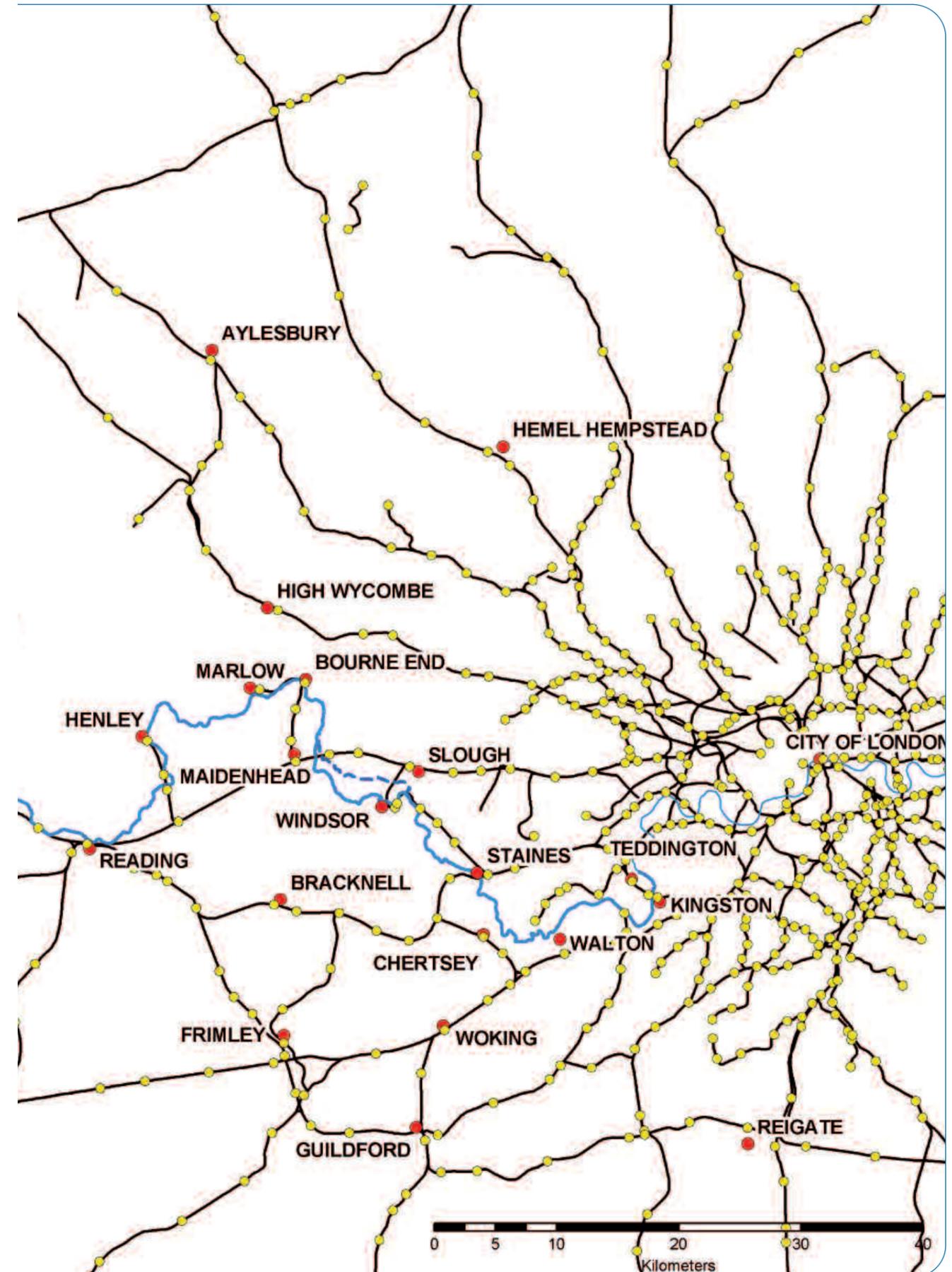
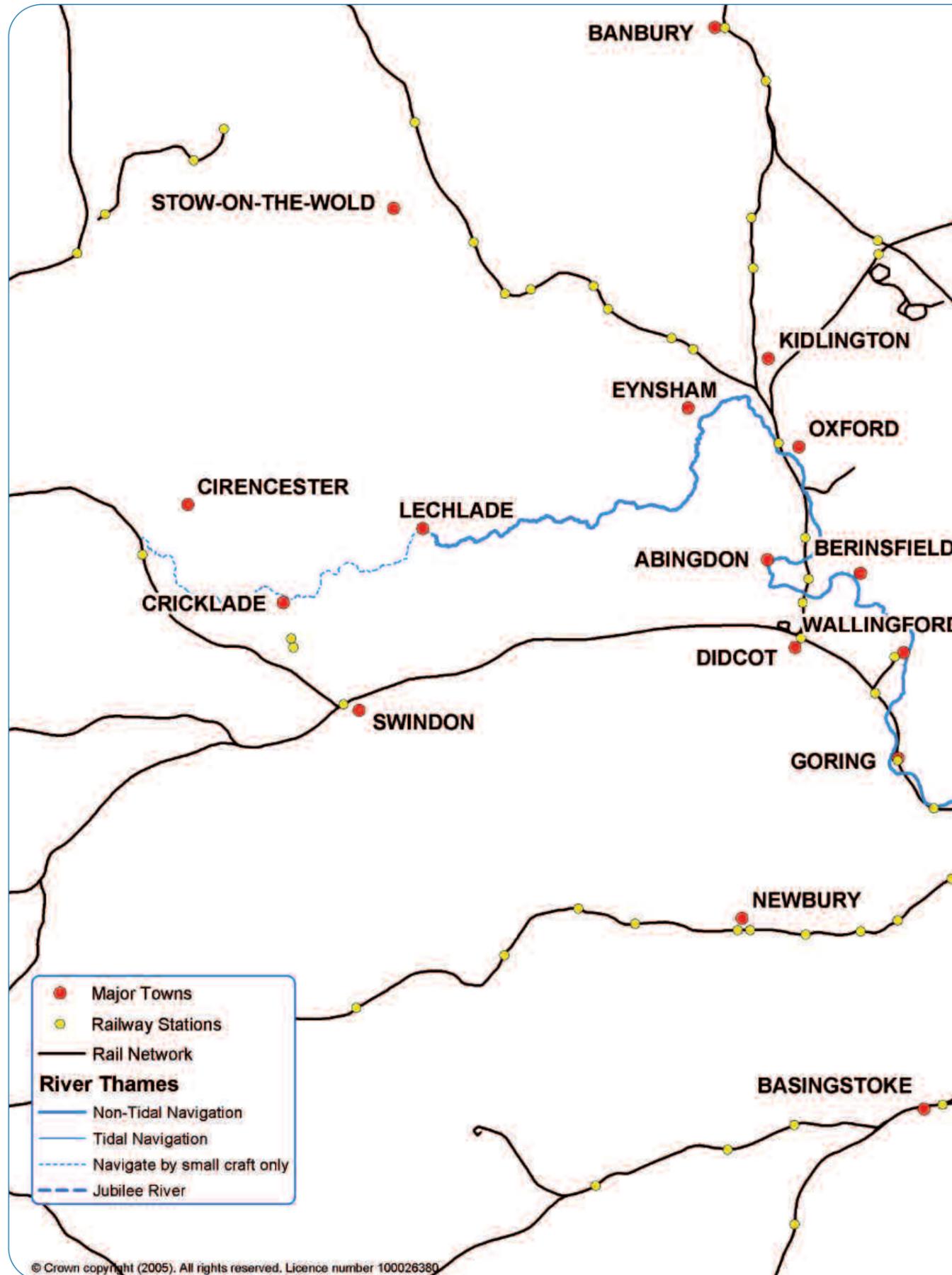
The *Discover the River Thames* campaign coordinates leaflets, posters, a website and public relations with simple, focussed images and messages, free from competing individual partner logos.

The marketing provides ideas for days out and healthy things to do on and alongside the river.

Relevance to plan policies:

- helps to establish a brand identity for the Thames
- promotes increased use of the river
- encourages use of public transport to get to the river
- promotes active recreation
- partnership working





8.2 Visitor attractions (map 7)

The Thames has a tremendous wealth of nearby visitor attractions. It offers more than any other inland waterway. There is great potential to develop tourist day and staying visits based on the river. Better visitor moorings at places of interest and improved signing to attractions from the towpath are needed to help realise this potential.

The number of visits made to attractions in England increased by 11 per cent between 2000 and 2004.¹

Visits to farms (by 48 per cent), gardens (36 per cent) and heritage centres (31 per cent) increased most, those to farms showing good recovery after falling dramatically in 2001 because of the foot and mouth epidemic.

Visitors to country parks (18 per cent), museums and art galleries (16 per cent) also increased over the same period. Wildlife attractions and zoos (8 per cent) and historic properties (4 per cent) had smaller increases, whilst visits to leisure and theme parks stayed about the same.

Legoland, Windsor, is the top attraction charging admission in the Tourism South East Region with 1.37 million visits in 2004. In the same year, Windsor Castle had 923,280 and Hampton Court 498,377 visits.

8.3 Visitor expectations and product quality

Visitors expect ever-higher quality of product and service. Competition for leisure spend is intense and new products and destinations are fast appearing. The rapid growth in new short-break destinations opened up by the low-cost airlines is a current example of such competition.

We know from survey work what walkers and boaters would like to see improved.²

Top of the list are better provision of toilets and water points. Better maintenance of the Thames Path is also needed with 29 per cent complaining about it being muddy and 27 per cent concerned about dog mess. Visitors would also like better provision of refreshments and information, with signing to places of interest. The greatest need specifically for boaters is for short-term or visitor moorings to access nearby pubs, shops, restaurants and places of interest.

Policy 4 - tourism

We will provide information and interpretation for visitors at the riverside

Possible actions

- 1 provide interactive touch screen Thames information at key lock sites and principal towns along the river
- 2 display local information at all lock sites
- 3 include information about the landscape, wildlife and fishing
- 4 provide signs from the Thames Path to nearby shops, pubs, restaurants and places of interest
- 5 promote sensitive design and siting of signs through adoption of *Thames Environment Design Handbook* guidance

Visitor surveys have revealed a strong demand for better information.

¹ Visitor Attraction Trends, England, 2004, VisitBritain, August 2005

² National Trails Thames Path User Survey 1999, Centre for Leisure Research
Environment Agency Navigation licence survey, Test Research, June 2003
Rivers and Broads Hire Cruiser Industry Study, Ken Dodd Associates, Nov 1998
Environment Agency Customer Satisfaction Survey 1998, Maritime Leisure Research Group, Southampton Institute. Land-based visitors.

Policy 5 - tourism

We will provide an excellent experience for visitors to the Thames

Possible actions

- 1 set waterway standards for the provision of services and facilities
- 2 encourage take-up of quality grading schemes including hire boats
- 3 improve provision and quality of riverside facilities

Operators along the river must offer the highest standards.

Case study 4

Cotswold Water Park

Cotswold Water Park is Britain's largest water park with 133 lakes created by gravel extraction, covering over 40 square miles. It adjoins the Thames Path and provides a network of footpaths, cycleways and bridleways. It is a significant tourist attraction in the upper reaches of the river.

The park is a nationally recognised area for wildlife, with spring-fed water of the highest quality. There are three nature reserves with bird hides. In spring and summer the place is alive with warblers, hobbies, sand martins and numerous birds in passage. Dragonflies abound on warm summer days around the shores of the lakes. Between the lakes there are old meadows full of flowers and butterflies. Along the streams and rivers visitors may see kingfishers, dippers, wagtails, otters, crayfish and the now rare water vole. During winter the park hosts over 20,000 waterfowl of 40 different species.

The park offers a wide range of opportunities for water-based sport, including sailing, windsurfing, kayaking and water skiing. Other activities include angling, cycling, horse riding, paintballing and a high ropes aerial adventure. There are two country parks open to the public. Keynes Park is the larger, providing a range of facilities year round including a children's beach, café, adventure playgrounds and a variety of water sports and activities for all the family. Neighbourbridge offers visitors a less developed, relaxed setting.

The park and vicinity offers camping and caravanning, self-catering holiday chalets, bed and breakfast, log cabins, and traditional inns.

Day-to-day management is carried out by the Cotswold Water Park Society. It was established in 1997 as a not-for-profit environmental body with charitable status, dedicated to improving the environment of the Cotswold Water Park for its residents and visitors.

It works in partnership with the local authorities in the area: Cotswold District Council, North Wiltshire District Council, Gloucestershire County Council and Wiltshire County Council. Working through a Joint Committee, the four authorities control large scale strategic and planning issues. The Society is dedicated to fund raising, establishing partnerships with other bodies, and practical management on the ground. This includes operating a ranger service and running the country parks. The Society also works with privately owned businesses to market the area. The Society has a board of members drawn from the local authorities, parishes, sports and conservation organisations as well as businesses in the park and nearby. Its founder patron is professor David Bellamy OBE.

Cotswold Water Park illustrates many of the Thames waterway plan objectives relating to sport, recreation, landscape, biodiversity, accessibility, education and tourism. The guiding principle of the Cotswold Water Park Strategy is that of sustainable development, where the needs of business, people (including existing residents) and wildlife are successfully met without prejudicing the quality of life for future generations.

9.0 Sport and recreation (map 8a and 8b)

9.1 Government policy

Government has published a strategy for delivering its sport and physical activity objectives.¹

It found that the quality and quantity of participation in sport and physical activity in the UK is lower than it could be, and levels have not changed significantly over recent years:

- for sport: only 46 per cent of the population participate in sport more than 12 times a year, compared to 70 per cent in Sweden
- for physical activity: only 32 per cent of adults in England take 30 minutes of moderate exercise five times a week, compared to 57 per cent of Australians.

Participation is lower among women and some ethnic minority groups: for example, Indian (31 per cent), Pakistani (21 per cent), and Bangladeshi (19 per cent) women in particular have a lower involvement in sport than the national female average of 39 per cent.

There are also wide variations between young disabled people and their non-disabled counterparts.

Participation falls dramatically after leaving school, and continues to drop with age. But the more active in sport and physical activity you are at a young age, the more likely you are to continue to participate throughout your life.

One overarching strategy objective is to achieve a major increase in participation in sport and physical activity, primarily because of the significant health benefits and to reduce the growing costs of inactivity. The target is for 70 per

cent (currently 30 per cent) of the population to be reasonably active (for example 30 minutes of moderate exercise five times a week) by 2020.

Sport England's vision of making England an active and successful sporting nation means getting and retaining significant numbers of new participants.² The Regional Sports Board South East has the responsibility for reflecting these objectives in the strategic plan for the region.³ The River Thames can play a significant part in meeting many aspirations that form part of the Board's vision. In particular those to:

- drive up participation levels in the South East by at least one per cent year-on-year
- use the natural resources of the region to increase participation
- encourage informal active recreation.

Sports clubs on the river have a major role in achieving other Sport England aims to:

- increase club membership
- increase the number of people receiving coaching and tuition
- establish a network of multi sport Community Clubs.

Dorney Lake (close to the river between Windsor and Maidenhead) is the venue for the rowing, sculling and sprint canoeing events at the 2012 London Olympics. The 2006 World Rowing Championships will also be held there.

The high profile of these events will raise interest in sport, providing a platform to increase participation.

The more active in sport and physical activity you are at a young age, the more likely you are to continue to participate throughout your life.

¹ Game Plan, Prime Minister's Strategy Unit, Dec 2002

² National Framework for Sport 2003

³ A short length of the river from its source falls within the Sport England South West Region. Their South West Plan for Sport has similar objectives.

9.2 Trends in participation

The table below shows the percentage of young people (aged 6 to 16) participating regularly in sport in 2002 comparing it to levels of participation in 1994.¹ The top three most popular sports are shown followed by other sports relevant to the river.

Figure 1 Percentage of young people participating regularly in sport 2002

Sporting activity	participation in 2002	Change since 1994
Swimming	51%	up by 1% (from 50%)
Cycling	49%	down 8% (from 57%)
Football	37%	no change
Walking (over one hour)	22%	down 1% (from 23%)
Fishing/angling	5%	down 2% (from 7%)
Rowing/waterskiing/canoeing	3%	down 1% (from 4%)
Sailing/windsurfing	3%	up 1% (from 2%)

Note that these are national statistics and do not necessarily reflect activity on the Thames. Nevertheless, they do indicate a challenge that needs to be addressed, particularly as activities taken up in childhood are most likely to continue into adulthood.

Policy 6 - sport and recreation

We will use the river to increase participation in sport and active recreation

Possible actions

- 1 ensure that the Thames waterway plan is consistent with other regional strategies such as the South East Plan for Sport
- 2 encourage innovative, inclusive and sustainable schemes to involve more people
- 3 explore benefits from 2012 London Olympics
- 4 plan and manage increased use to minimise potential conflict
- 5 publish codes of conduct in consultation with users

The river is one of the region's major natural resources, right on people's doorsteps.

Policy 7 - sport and recreation

We will work with sports and recreation clubs and other providers on the river to help increase their membership and levels of participation

Possible actions

- 1 support sport governing bodies and clubs with outreach programmes that encourage participation by all sections of society
- 2 provide accurate up-to-date information about sport and recreation opportunities on the river
- 3 provide facilities for multi-sport clubs
- 4 review provision of block licences for unpowered craft

Canoe, sailing and rowing clubs provide people with access to boats, training and facilities. Angling clubs can promote participation.

¹ Young People and Sport in England, Trends in Participation 1994-2002, MORI for Sport England 2003