

## the national picture

Tourism is the UK's sixth largest industry. It is valued at £76 billion<sup>8</sup> and employs 7.4% of the workforce, sustaining 2.1 million<sup>8</sup> full time equivalent jobs. The Government recognised the importance of tourism in its first national tourism strategy, *Tomorrow's Tourism*, published in 1999. The message of the strategy is that tourism is important to the economy and needs to be attractive and competitive.



It set out three key aims:

- ▶ providing the right framework for tourism to flourish
- ▶ developing and spreading quality
- ▶ encouraging the wise growth of tourism

The Foot and Mouth epidemic of 2001 placed tourism higher still on the national agenda, showing up the vulnerability and lack of co-ordination of the industry, whilst subsequent international terrorist attacks and the ongoing 'war on terror' have severely damaged confidence in world travel.

Other deterrents to visitors from overseas have included the continued strength of the pound and the introduction of the Euro, which makes it more convenient for travellers within Europe to visit countries already accepting the currency.

Meanwhile, there are increasing alternatives for a hitherto loyal domestic market, as a result of:

- ▶ the rapid growth of cheap flights abroad, offering more financially viable and apparently more exotic short breaks;
- ▶ the rush of new attractions funded by National Lottery grants, spreading visitors more thinly and detracting from more established sites;
- ▶ the diversification of the traditional 'day out' to include, for example, leisure shopping at purpose-built complexes away from mainstream centres of tourism, and
- ▶ the stay-at-home ('slob') society brought about by the rise and variety of home entertainment such as computer games, television and DVD.

The current trend towards breaks and holidays overseas continues to be underpinned by the expectation of better weather and value for money and by the comparative ease of booking through, for example, the traditional high street travel agent or internet.

2003 saw the amalgamation of the former British Tourist Authority and English Tourism Council to form one body – VisitBritain – that is responsible for promoting Britain overseas and England to the domestic market. At the time of writing this strategy, business plans and priorities are only just beginning to emerge.

In spite of recent difficulties, there is still great confidence that the country's tourism industry will continue to thrive. Moreover, there are estimated to be approximately four domestic trips for every one visit from overseas, making the UK marketplace critical to the success of Britain's tourism industry. This is especially true for Winchester, which currently receives around 4.5 million UK visitors for every 42,000 from overseas.<sup>9</sup>



<sup>8</sup>Tomorrow's Tourism Today, DCMS 2004

<sup>9</sup>The Economic Impact of Tourism on Winchester District 2003



## the regional situation

The single most important regional agency working with tourism providers in the Winchester District has until recently been the Southern Tourist Board (STB). STB has now merged with the South East England Tourist Board to form a single new regional tourist board known as Tourism South East (TSE). The merger should facilitate new partnerships with other destinations across the south of England and bring new ideas, new ways of working and more examples of best practice into circulation across the region.



Winchester enjoyed a high profile in the Southern Tourist Board region and is forming strong links with the new board to ensure that the District continues to enjoy the privileges due to a recognised destination. It has already acquired a guaranteed place on the committee of the Hampshire Sub Region of TSE in view of its brand potential. Moreover, Winchester Tourist Information Centre won the TIC of the Year category in TSE's first Awards for Excellence competition in 2003.

Winchester's tourism industry also benefits from proactive and imaginative commitment by Hampshire County Council. Winchester provides a natural focus for County Council-led activity as the centrally located and easily accessible county town. The five key themes of the County's current tourism strategy are:<sup>10</sup>

- ▶ safeguarding Hampshire's environment and community
- ▶ increasing economic benefit
- ▶ providing a quality product and experience
- ▶ working together to create marketing impact
- ▶ developing a better understanding of tourism



<sup>10</sup>Tourism 2000-2005, Hampshire County Council

## the local setting

### Why do people visit?

In many ways Winchester is a typical historic city destination. Its obvious strength is its heritage, with the two most significant traditional attractions – in terms of visitor numbers – being the cathedral and the Round Table hung in the Great Hall. In addition to its place as England’s ‘capital’ in the time of King Alfred, the city is probably as well known for its Jane Austen connections. However, the tourism assets of the District are many and varied, and extend into the rural area which surrounds Winchester. Research shows that our visitors enjoy the following features of the District:<sup>11</sup>

- ▶ attractive architecture
- ▶ compact nature of the city
- ▶ proximity of countryside, water meadows, parks and green spaces
- ▶ riverside walks
- ▶ tranquil, intimate atmosphere
- ▶ specialised shopping
- ▶ wide range of pubs and restaurants, farmers’ markets, delicatessens and local producers for food-lovers
- ▶ scenic, traditional towns and villages (eg Alresford, Bishop’s Waltham, Wickham, the Meon Valley)
- ▶ lively, colourful events such as the Hat Fair and Folk Festival
- ▶ galleries and public art
- ▶ year-round beauty

Industry experience shows that visitors also enjoy the wide variety of permanent attractions, many of which are on offer throughout the year with no closed season in the winter. There are high-profile attractions such as the cathedral, Marwell Zoological Park and Mid Hants Steam Railway. And there is a fine line-up of smaller, specialist attractions – such as the collection of six military museums at Peninsula Barracks or the recently restored Theatre Royal. A number – including the renowned Great Hall – are free to enter.

Visitors are also delighted by the range of entertainments on offer, particularly during the summer season. A varied programme of festivals and special events – from folk to street theatre; from music to children’s events, and from civic displays to Christmas celebrations – creates a vibrant atmosphere in the streets and open spaces of the District, complemented by prize-winning floral decorations and a growing café culture.

<sup>11</sup>Winchester City Council’s Marketing Image Review, February 2003

Winchester was rated the UK’s fifth favourite city in the 2003 Guardian/Observer Travel Awards, with only one other English destination ahead of it. The same awards ranked the Hotel du Vin chain, which began life in Winchester, as the country’s best in both 2003 and 2004.



### The Winchester District



The District enjoys the advantages of being easily accessible from London and near to ferry and air terminals, with the city being well connected to car, rail and coach routes. It will be a gateway to the proposed new South Downs National Park and is already well positioned as a destination for outdoor pursuits such as walking and cycling. Winchester itself is compact in size and easy to navigate on foot, but it is also situated on the route of four long-distance paths as well as forming the start (or end) point to the South Downs Way.

Winchester is fortunate to have a well-resourced local authority tourism service. This has the support of City Councillors and colleagues and also very active relations with tourism providers of all sizes, particularly in the hospitality and attractions sectors. There is a strong tradition of partnership working, ranging from public/private PR and conference consortia to a cross-departmental City Council officer group working on signage improvements. This positive approach to tourism management has undoubtedly contributed to the quality of the visitor experience in the District, which prompts 94% of those who come here to say that they would recommend Winchester to others.<sup>12</sup>

### Winchester’s marketing challenge

For many years Winchester has used its status as ‘England’s ancient capital’ as a basis for marketing and PR campaigns. However, the District lacks the internationally recognised features of other historic cities such as Bath’s thermal waters, Shakespeare’s birthplace at Stratford on Avon or the university colleges of Cambridge. If these are ‘premier league’ destinations, then Winchester has ‘first division’ status alongside such cities as Chichester, Canterbury and Salisbury. This has some advantages in that the District is unlikely ever to

<sup>12</sup>Winchester Visitor Survey and Destination Benchmarking 2003

become dominated by the effects of tourism to the exclusion of other activity, but it presents the local industry with the following challenges:

- a) raising the profile of Winchester in the crowded international marketplace when there are limited resources available for marketing;
- b) providing and managing a visitor experience which is of a standard to match the District’s premier league rivals, and
- c) exploiting innovative opportunities to project a truly distinctive identity for Winchester and so make the District a destination of choice for potential visitors.

The most recent benchmarking study carried out on behalf of Winchester by TSE showed that the District scored well across the board in terms of the facilities, services and general atmosphere encountered by visitors. The overall standard of our tourism product and infrastructure is high, and the City Council continues to promote a quality approach – for example, through the introduction in 2003 of an assessed-only policy for visitor accommodation in the District. The biggest challenge for the coming years is not, therefore, one of product but one of promotion. Whilst this strategy is committed to the continuous improvement of the visitor experience, the most important element must be to raise the profile of the District in key markets and so generate more high-yield visits.





**Partnerships at Work**  
Improving information provision

Winchester City Council's Signage Review Group consists of officers from the tourism, highways, PR and planning teams, along with Winchester's City Centre Manager. It considers all issues relating to motor and pedestrian signing in the District, supporting a consistent approach to new signing policy and providing a mechanism by which to review existing provision. In 2002, the group successfully bid for a £10,000 grant from the Winchester Movement and Access Plan fund with which to erect a network of 9 static tourist information points for all car parks in the city. These complemented existing points outside the railway station and tourist information centre, and were matched in 2003 with a further three points at the Bus Station and Morn Hill Campsite.



**New developments**

Scope for large-scale tourism development in the Winchester District is very limited: there is just one site identified for a hotel in the city (at Morn Hill) in Winchester City Council's Local Plan, for example. This is under development at the time of publication. In spite of this restriction, the range of visitor facilities and attractions continues to expand.

2001 saw the much-anticipated reopening of the refurbished Theatre Royal, and in 2002 the futuristic new INTECH centre for hands-on science and technology came to life at Morn Hill. 2003 brought the refurbishment of a former guard house at Peninsula Barracks as a visitor centre for the site and the new Adjutant General's Corps Museum. It also saw the opening of a new public garden in the city centre to mark Hyde Abbey, King Alfred's last known resting place. In terms of open air developments, 2002 marked the launch by Hampshire County Council of a long-distance walking route called the St Swithun's Way – a 34 mile trail linking Winchester to Farnham. In addition, there is ongoing work by Hampshire County Council to expand the capacity of the city's Park and Ride service, which included the opening of a new car park in late 2003. This added 420 spaces along with toilets, vending facilities, information boards and an on-site parking attendant.

Three major capital projects are now being planned which will have a significant impact on Winchester. The City Council is ensuring that the development of the city's tourism 'offer' is integral to both. These are:

- a) the redevelopment of the Broadway/Friarsgate area of Winchester to enhance the lower end of the High Street, incorporating a new bus station and mixed-use development of housing and retail outlets, and
- b) the refurbishment of the High Street in Winchester, which was one of the earliest in the country to be pedestrianised.
- c) the development of a cultural centre in Jewry Street. Winchester is creative in the re-use of existing buildings, and this joint venture by Hampshire County Council and Winchester City Council will expand the existing lending library to form an impressive new facility. This will house both the lending and reference libraries; a flagship art gallery; lifelong learning, heritage display and computer facilities and information services. With the theatre and restaurants close by, it will help to establish a 'cultural quarter' in Jewry Street.

The Winchester District is also at one end of the proposed South Downs National Park, which is still under discussion at the time of writing this strategy. It is well placed to benefit from the National Park Authority's remit to increase leisure use and public awareness of this large expanse of countryside. The City Council has already been in discussion with the East Hampshire Area of Outstanding Natural Beauty Management Board and is keen to maintain a sensitive partnership approach to the many possibilities and possible problems posed by the park's designation.

**Partnerships at Work**  
Visitor management in action

In 1996 Winchester Tourism developed a new Parking and Access Map for the city, in collaboration with the City Council's engineers and parking divisions. The use of this map in the annual **Days to Treasure** leaflet and **Visitor Guide**, supported by appropriate advice from the tourist information centre and on the internet, has had dramatic results. Numbering 500,000 pieces of print in total, these two publications have been widely distributed outside the District in order to give would-be visitors the information they need before they arrive. A 13% increase in the use of long term car parking in just two years from 1998 to 2000 has been attributed to the widespread circulation of the map, and this has been complemented by a 34% increase in those staying more than four hours in these car parks between 1996 and 2000. By actively managing visitors in this way Winchester City Council has helped to reduce car movements in the historic city centre thereby decreasing congestion, noise, pollution and other motor disturbances.



**Other key issues for tourism in the Winchester District**  
A substantial programme of local research and consultation took place between 2000 and 2003 to inform and develop this strategy. Details can be found in Appendix Two. The list below is of the critical concerns identified by Winchester City Council during this process:

- ▶ the more lucrative overnight visits, especially from overseas, are slowly but steadily declining. Reversing this trend is a priority and apparently simple actions, such as a commitment by retailers to accept the Euro, could make a real difference.
- ▶ traditional forms of promotion (eg PR, advertising) offer diminishing returns and need to be supported by a more original marketing strategy.

- ▶ visits to the cathedral have been seriously declining as part of a national trend. As the District's main heritage attraction, the industry needs to work with the cathedral to help reverse this decline.
- ▶ there is both market potential for and developer interest in an additional budget-style hotel in the city<sup>13</sup> with between 80 and 130 rooms. The new style of 'designer' budget hotel would be appropriate for Winchester's image, although established national chains would be equally acceptable to consumers.



- ▶ there is demand for campsite facilities closer to the city centre, although appropriate land is unlikely to become available in the foreseeable future.
- ▶ group accommodation is in short supply, particularly during term time, and the existing youth hostel is threatened with closure at the time of publication.
- ▶ it is perceived that there is a lack of evening entertainment for visitors across the District, although new licensing regulations may help to stimulate the evening economy in the coming years.

<sup>13</sup>Hotel Sector Shortage Study for Hampshire, August 2001



- ▶ partnership working with the market towns and rural parishes in the District should be improved to provide better support for effective local tourism initiatives.
- ▶ there is too little communication with the important retail and restaurant sectors and with providers in the rural parts of the District. More effective mechanisms are required to close this gap and so increase partnership opportunities.
- ▶ it is difficult to develop sustainable transport options and so effectively promote rural areas in Winchester (as elsewhere in the country, as a result of national weaknesses in the public transport infrastructure). By continuing to work closely with the County Council and private operators, the City Council should aim to make significant, if localised, improvements to transport provision which will benefit visitors and residents alike.
- ▶ there is an urgent need to provide for a new generation of 'money rich, time poor' tourists who require better information, better product packaging and the ability to make quick, last-minute bookings using new technologies. Winchester – like much of the UK's tourism industry – has been slow to make this provision.
- ▶ there is a legal requirement from October 2004 to improve physical accessibility to services in the public and private sector for those with disabilities, under the terms of the Disability Discrimination Act 1995.
- ▶ there is a political and social desire to increase opportunities for residents on low incomes to enjoy days out and to visit public attractions.
- ▶ consumer expectations – in terms of product quality, availability, diversity and ease of booking – are constantly rising. We cannot assume that what we have done in the past will be good enough in the future.
- ▶ in common with other tourist destinations, there are poor service levels in some sectors of the industry, resulting from stereotypical low paid jobs with poor development opportunities. More attention needs to be paid to the training, development and morale of staff in key sectors.
- ▶ changing leisure patterns, such as increased weekend working and six-term school years, will lead to 'flatter' seasonal profiles for the industry. Winchester, with so much 'year-round' product, is well placed to exploit this opportunity.
- ▶ there is increasing reliance by consumers on web-based information and services. Winchester Tourism works in partnership with the *Visit* destination management team to develop IT solutions for marketing, e-commerce and other areas of work. New facilities need to be added more quickly to the current range in order to satisfy consumer expectations and compete with other destinations around Europe.
- ▶ house prices in Winchester, as in many other historic towns, are prohibitively high for many essential, front-line workers in the tourism industry. Whilst this is a problem which is unlikely to be resolved in the life of this strategy, a creative approach to development may afford opportunities to alleviate the situation.

## Partnerships at Work Student skills

*Successful student placements should result in a two-way exchange of benefits. In 2003 and 2004, Winchester Tourism hosted three very different placements. The first was a two-term internship for a Tourism and Heritage Management degree student from King Alfred's College. Her placement gave rise to the production of **The Winchester Watercress Tour**, a brand new rural product which required detailed research to compile. The second, a short-term arrangement with a student studying for an MSc in multimedia systems at London Metropolitan University, resulted in a CD Rom-based press pack for use by the Discover Winchester group. Finally, a management trainee working in the marketing unit on the national graduate development programme researched and initiated Winchester Tourism's first venture into the group travel market. These projects were made possible because of the additional time and interest dedicated by our student colleagues.*

