

## the importance of tourism

Tourism is an established part of the economic prosperity of the District and is recognised as such by businesses and residents. It creates and sustains commercial activity and jobs from bar staff to senior management posts. These include 'starter jobs' that can support people through education courses or provide a valuable first step into the working world. Tourism employment also provides opportunities for those who need to fit work around other life choices and commitments, and for those with practical talents as well as those with academic or management skills.

But tourism is also a key factor in sustaining the quality of life of our local residents. The presence of visitors and the money they spend here helps to:

- ▶ ensure that many of our favourite attractions, eating places and shops continue to exist;
- ▶ encourage a sense of ownership and civic pride in the community;

- ▶ secure funding for new facilities, transport improvements and events such as Winchester Hat Fair;
- ▶ encourage public service providers to ensure that facilities are well looked after and services are of a high standard;
- ▶ stimulate interest in rural diversification, regeneration and environmental projects;
- ▶ encourage businesses to participate in local initiatives such as Winchester in Bloom, the results of which are enjoyed each year by all who live and work here;
- ▶ attract the interest of entrepreneurs from other industries, like the many craftspeople and high technology businesses who have chosen the District as their home.

The City Council is committed to the continued delivery of these benefits to local residents and the local economy by promoting and managing tourism.

Winchester and surrounding area



## who are winchester's visitors?

Thanks to the City Council's ongoing programme of tourism research, we know a great deal about who visits the Winchester District and why. Key features are:

- ▶ an increasing number of day visitors and a steady decrease in overnight visitors (4.1 million day trips compared with 355,000 overnight stays in 2003)<sup>3</sup>
- ▶ a strong UK market with significant but slowly declining numbers of overseas visitors (42,000 overseas visits, equating to 333,000 bednights in 2003)<sup>3</sup>
- ▶ visitors from right across the UK, as far north as the Scottish Borders<sup>4</sup>
- ▶ two significant market segments: DINKs ('Dual Income No Kids' – the 30-something professionals with high spending capacity) and Empty Nesters (older couples whose children have left home)<sup>4</sup>



What has become very clear from the latest economic impact and visitor survey reports<sup>5</sup> is that visitor profiles and segments are gradually changing. In particular, an increase in day visiting is offsetting the slow decline in overnight stays. Whilst this is in keeping with other UK destinations, it would clearly be preferable to stimulate more, lucrative staying visits rather than excessive numbers of lower-spending day trips.

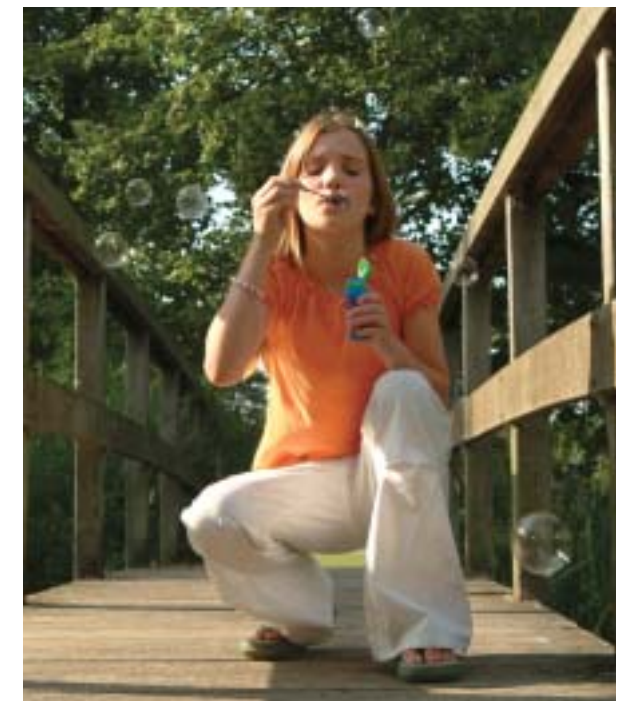
## the big numbers

Evaluating the value and volume of tourism is not an exact science. Models vary and there is a lack of consistency in the base data at national level which is compounded by difficulties in the collection of data at a local level. Most local authorities use one of two accepted UK models in order to achieve a degree of comparability. Winchester City Council has



commissioned regular economic impact studies using the Cambridge Model from the Southern Tourist Board<sup>5</sup> over the last decade. The findings of the most recent study are set out in the table over the page.<sup>6</sup>

For the past four years, the City Council has also jointly commissioned an ongoing study entitled Hampshire Tourism Trends. Using a stable set of respondents, this survey plots accommodation occupancy profiles, visitor levels at attractions and tourist information centre customer numbers in order to gain an overview of visitor patterns on a district by district basis. Over the three years from 1999 to 2002, the Winchester District appears to have held its own in terms of accommodation occupancy levels and the length of stay of visitors.



<sup>3</sup>The Economic Impact of Tourism on Winchester District 2003

<sup>4</sup>Winchester Tourism Customer Profiling Report, Southern Tourist Board March 2002

<sup>5</sup>Southern Tourist Board was the predecessor of Tourism South East which formed in April 2003

<sup>6</sup>The Economic Impact of Tourism on Winchester District 2003

<sup>7</sup>Copies of recent research findings can be found on [www.visitwinchester.co.uk](http://www.visitwinchester.co.uk)

Spending on overnight visits has increased substantially – by 30% between 2000 and 2003, in the case of overseas visitors – adding weight to the case for promoting Winchester first and foremost as a destination for short breaks. Also significant is the size of the ‘VFR’ market – those visiting friends or relations in the District – which makes up 43% of staying visitors. Local residents are, consequently, an important channel for both direct and indirect marketing.

In the tables to the right, the following terms are used:

▶ **domestic staying visitors**

visitors who stay at least one night in the District whose normal place of residence is elsewhere in the UK

▶ **overseas staying visitors**

visitors who stay at least one night in the District, whose normal place of residence is outside the UK

▶ **day visitors**

visitors from outside the District who spend time in the District for leisure or business purposes other than those that might be considered routine (eg regular shopping trips, coming to normal place of work)

**The total spend generated by all these visitors is £171.3 million per annum.**

▶ **FTE jobs**

the number of jobs measured in full time equivalents, as opposed to the ‘actual’ number of jobs which would include part time, seasonal and other types of working

▶ **indirect jobs**

jobs outside the tourism industry sustained as a result of the needs of the industry (eg in groceries, butcher’s, shops, laundries)

▶ **induced jobs**

jobs created because employees employed as a result of visitor expenditure spend their wages locally on goods and services such as food, clothing and housing

**Tourism sustains almost 3,700 actual jobs, or 2,645 full time equivalents.**

**Table one: volume and value of tourism to the Winchester District**

Domestic staying trips			
	2000	2002	% change
Trips	346,000	313,000	-9.5%
Nights	1,263,000	832,000	-51.8%
Spend (£)	35.8m	38.7m	8%
Overseas staying trips			
	2000	2002	% change
Trips	55,000	42,000	-23.6
Nights	289,000	330,000	14%
Spend (£)	13.0m	17.0m	30.7%
Day trips			
	2000	2002	% change
Trips	3,625,000	4,145,000	14%
Spend (£)	86.9m	106.5m	22.5%
All visitors			
	2000	2002	% change
Trips	4,026,000	4,500,000	11.7%
Spend (£)	135.6m	162.2m	19.6%

**Table two: visitor expenditure by sector in the Winchester District**

	2000	2002
Accommodation	£17.27m (13%)	£17.10m (11%)
Catering	£48.37m (36%)	£50.83m (31%)
Retail	£37.15m (27%)	£52.38m (32%)
Attractions, ents. & leisure	£14.40m (11%)	£16.08m (10%)
Transportation	£18.42m (13%)	£25.80m (16%)

**Table three: employment in tourism (actual jobs)**

	2000	2002
Direct	3,037	3,095
Indirect & induced	926	591
Total	3,964	3,685

*All figures taken from The Economic Impact of Tourism on Winchester District 2003*



**Partnerships at Work**

*Discover Winchester*

*The Discover Winchester consortium was established over eight years ago at the suggestion of Winchester Cathedral’s Commercial Director. Members contribute an annual subscription into a joint fund which pays for the year-round services of a professional public relations agency. The agency is set the task of securing editorial features in the national consumer media in order to stimulate short breaks to the District. During its life, Discover Winchester has been responsible for around £6 million of editorial coverage (in advertising equivalent terms). It was also behind a successful bid for European funding to create a network of interpretive plaques on the key buildings in the city, supported by a self-guided trail leaflet called **The Winchester Walk** which is now one of the City Council’s most popular pieces of tourism print. Among the members of Discover Winchester are hotels, attractions, conference venues and local authority services, all of whom believe that it is important to generate a national profile for the District if we are to attract visitors in a competitive market place.*

