



# VISIT WINCHESTER

## WINCHESTER VISITOR ECONOMY : AUDIENCE INSIGHT 2025

PRESENTATION REPORT

# A survey research programme with existing and potential visitors, to support the development of a new tourism strategy for Winchester City and District.

Online survey developed and distributed via an independent research panel and via databases held by Visit Winchester and supporting social media activity.

Survey live between 30<sup>th</sup> May and 22<sup>nd</sup> June 2025.

Sample of 1,015 interviews achieved – 330 via research panel and 685 via Visit Winchester – resulting in a robust dataset for analysis.

Sample structured to be inclusive of those who have and have not visited Winchester, as well as local and non-local respondents.

## SAMPLE DEFINITIONS

Recent visitor	Has visited Winchester City and or District for leisure in the last 2 years
Past visitor	Has visited Winchester City and or District previously for leisure, but over 2 years ago
Non visitor	Has not visited Winchester City and District previously for leisure, but are open to visiting
Local	Lives in Hampshire
Non-local	Lives in UK, but beyond Hampshire

## SAMPLE STRUCTURE [no. of interviews]

Recent visitor	360
Past visitor:	305
Non visitor	350
Local	248
Non-local	767

- CORE RESEARCH OBJECTIVES:
- To profile existing and potential audiences
  - To measure awareness and understanding of Winchester as a visitor destination
  - To explore which aspects of the Winchester visitor offer carries greatest appeal

Significance testing is undertaken to a 95% confidence level. Statistics marked with a red box are significantly higher than their counterparts; statistics marked with a blue box are significantly lower.

## RELATIONSHIP WITH WINCHESTER



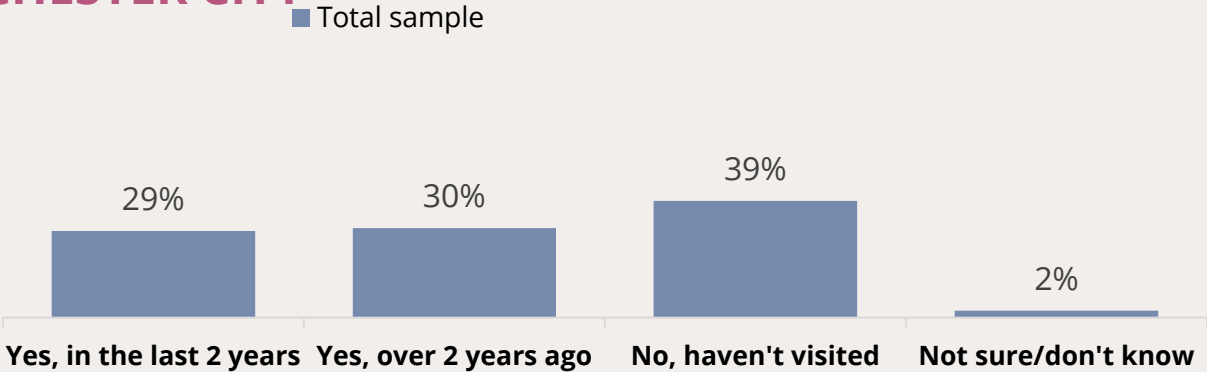
# Winchester visit history



- Good spread of visitor types within the sample.
- Past visitors less likely to have ventured beyond the city.

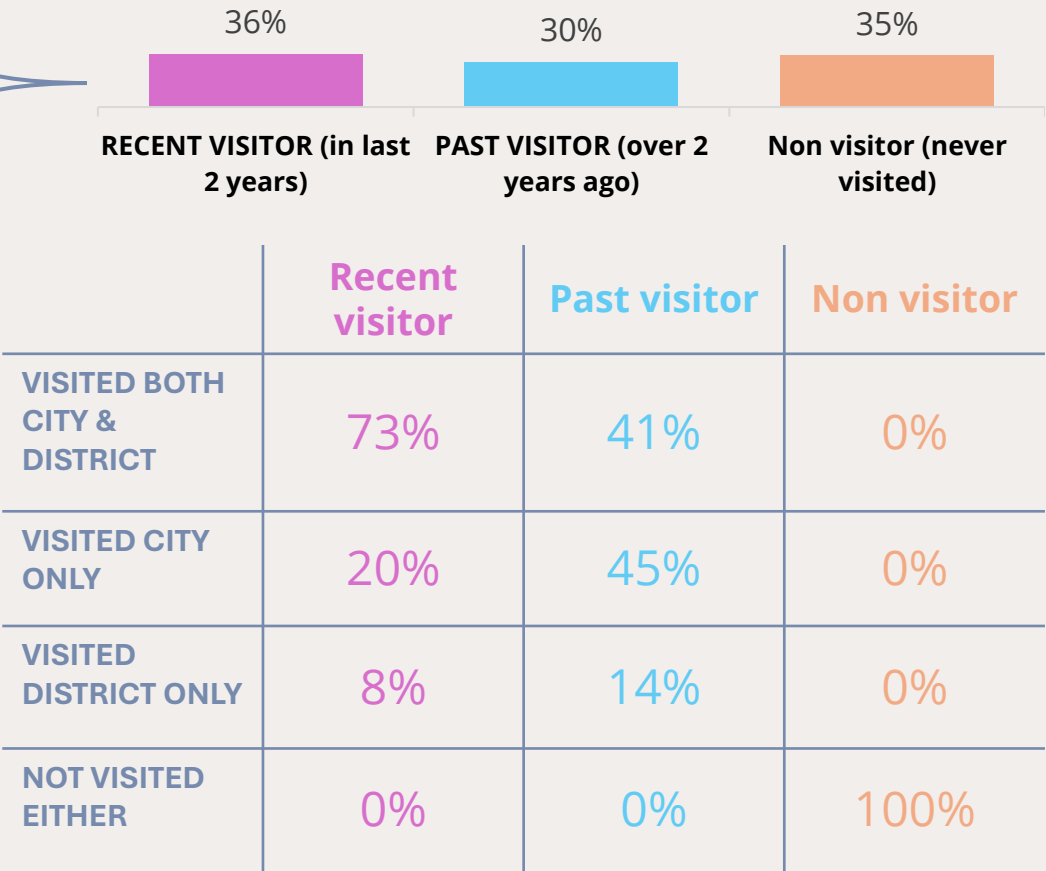
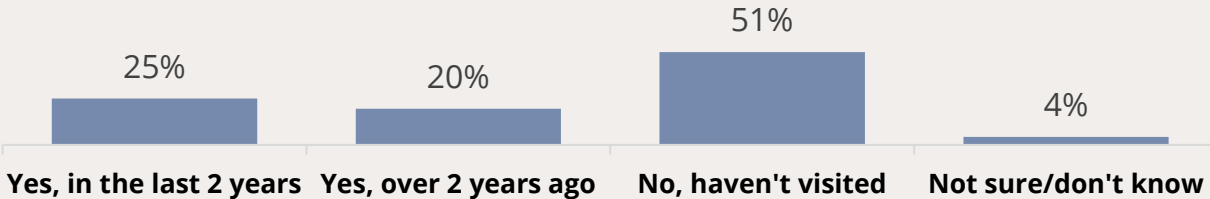
Which, if any, have you ever visited for a day trip, short break or holiday?

## WINCHESTER CITY



## WINCHESTER DISTRICT

[MAP SHOWN]

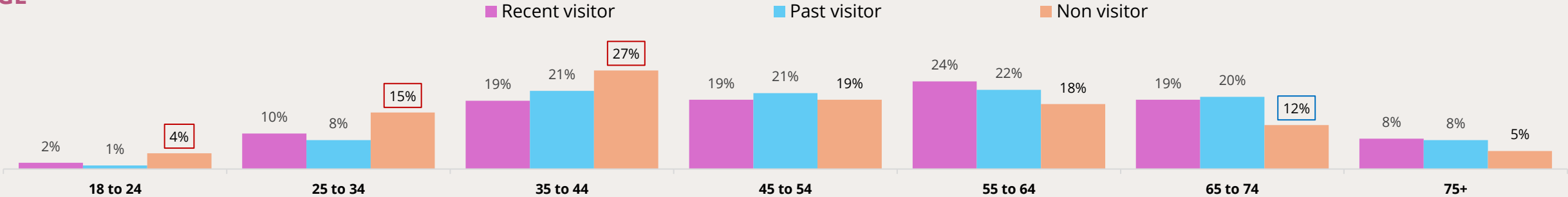


# Profiling the visitor segments

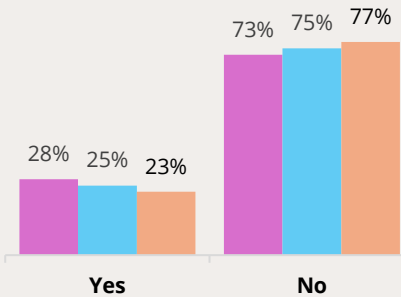


- Visitors (recent and past) have an older age profile than non visitors.
- Relatively consistent socio-economic profile across the audiences. Incidence of family groups also comparable, although indication that adult only groups are in the majority within Winchester visitor base.

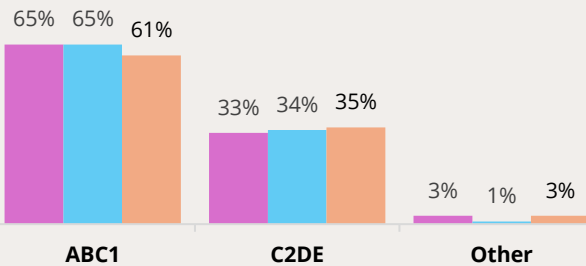
## AGE



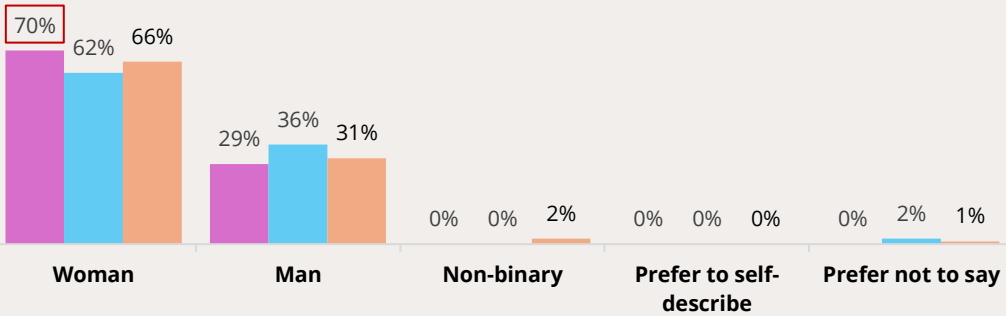
## UNDER 16s AT HOME



## SEG



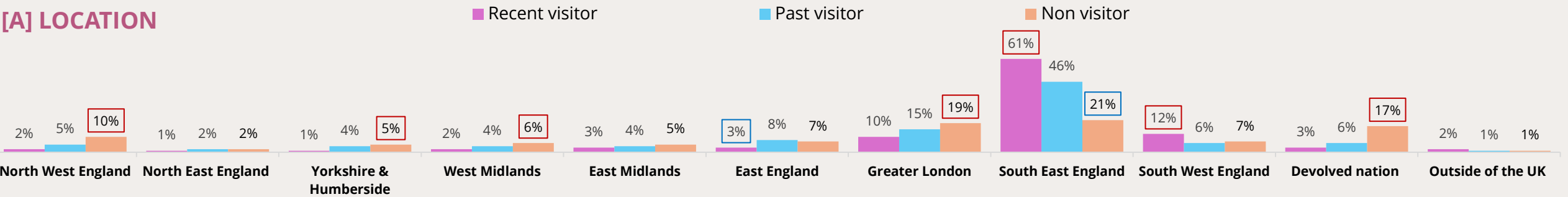
## GENDER



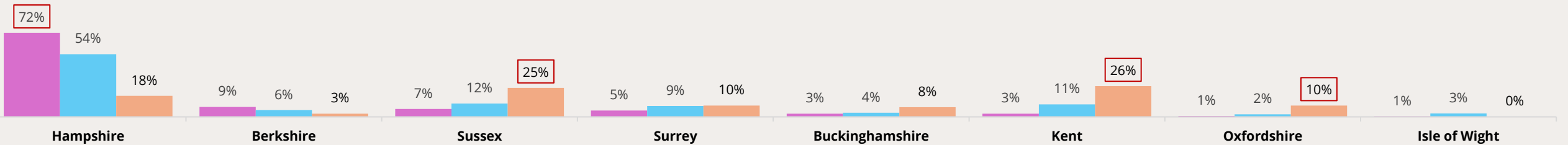
# Profiling the visitor segments

- 3 in 5 recent visitors live in South East England. The majority of these live in Hampshire.

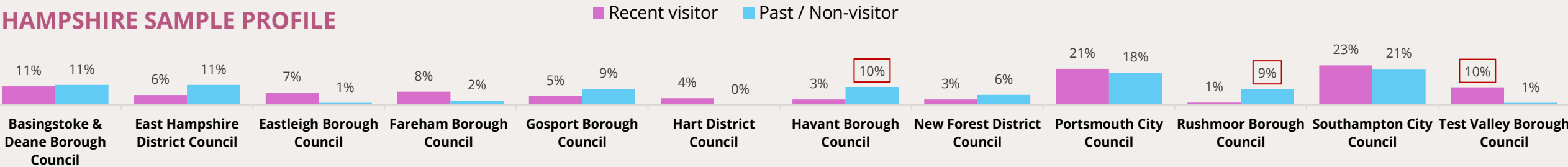
## [A] LOCATION



## [B] SOUTH EAST SAMPLE PROFILE



## HAMPSHIRE SAMPLE PROFILE



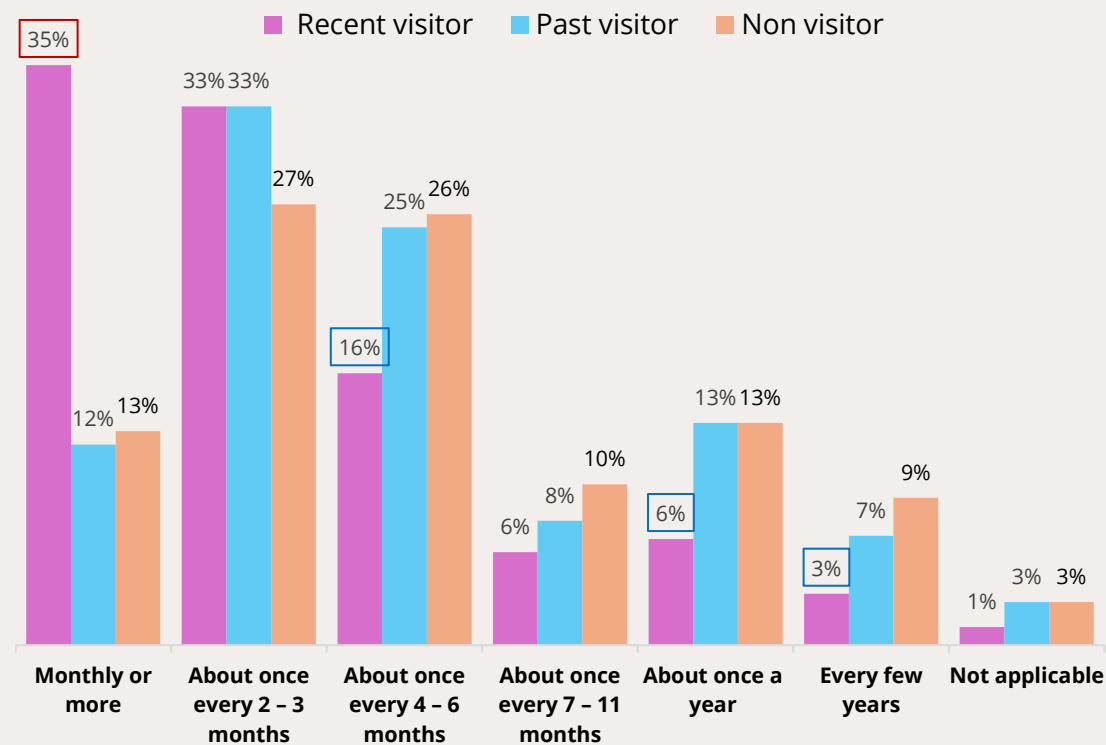
## LEISURE BEHAVIOUR



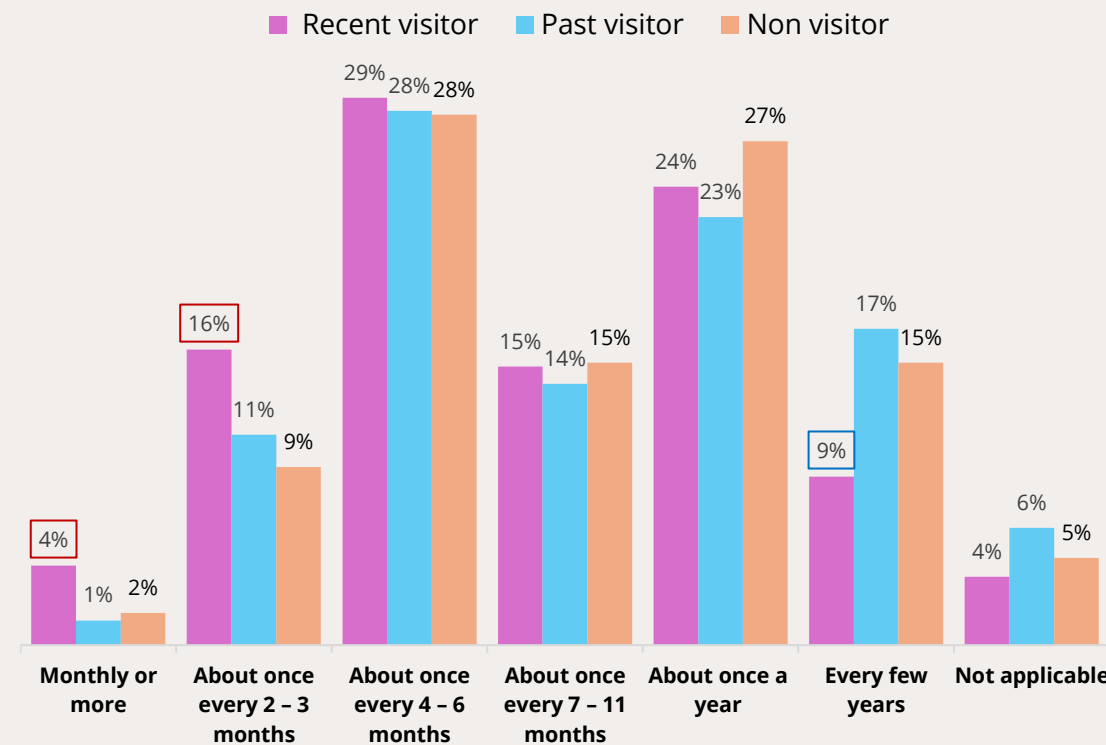
# Frequency of UK day trips, short breaks or holidays

- Recent visitors day trip in the UK regularly – 1 in 3 monthly or more.
- Indication that all audiences are most likely to take a UK short break or holiday once or twice a year.

How often, if at all do you typically go on a day trip within the UK?



How often, if at all do you typically go on a short break or holiday within the UK?





# What they look for

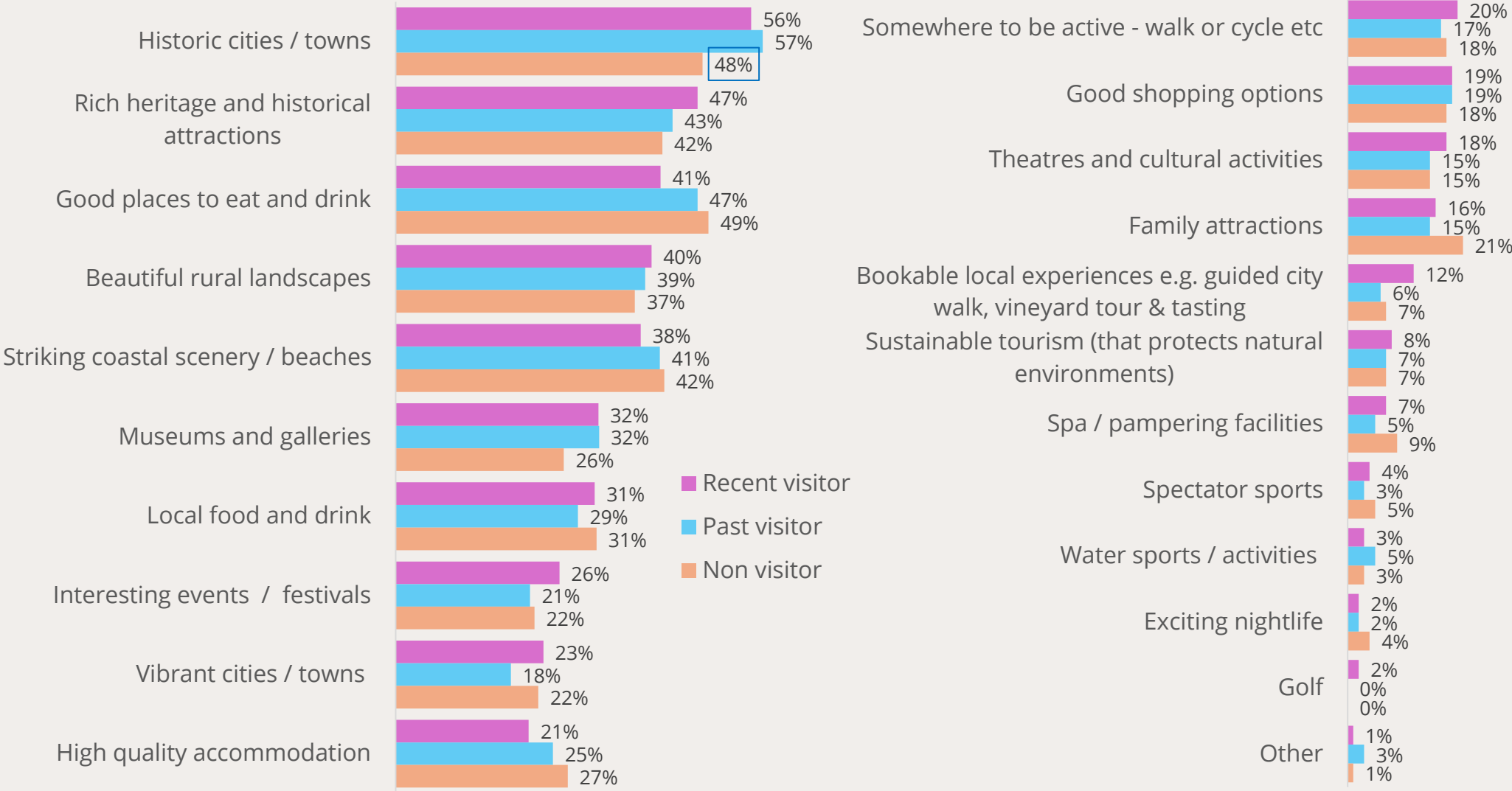
- All three audiences are drawn to similar things when it comes to choosing a UK destination.
- Historic cities / towns leading factor for both recent and past visitors. It is also a leading requirement for non visitors, albeit with slightly less weight.

Thinking about the places that you like to visit, please tell us the top 5 things that you look for: TOP 10



# What they look for – all factors tested

Thinking about the places that you like to visit, please tell us the top five things that you look for:



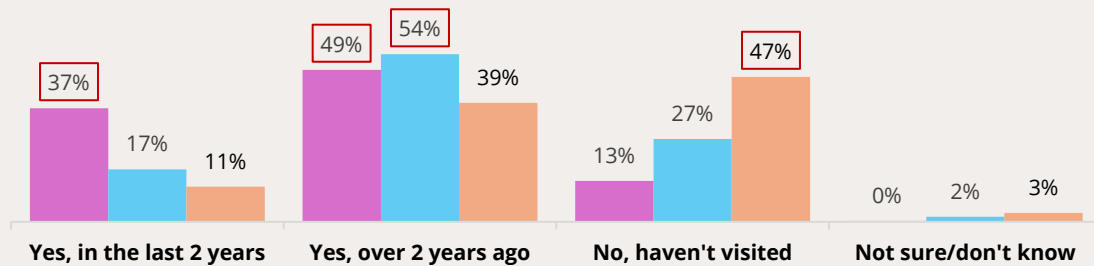
# Other cities visited for a day trip, short break or holiday

- York has most consistent visitor behaviour across the audiences.
- 3 in 10 recent visitors also been to Salisbury in last 2 years, but notably less popular amongst non visitors.

Which, if any, have you ever visited for a day trip, short break or holiday?

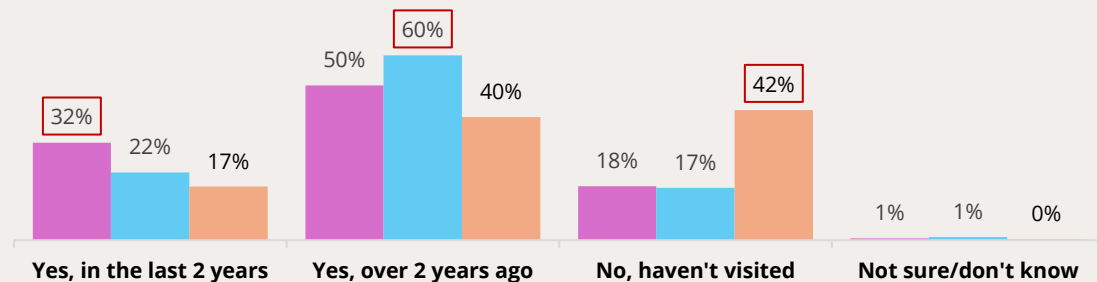
## BATH

Recent visitor Past visitor Non visitor



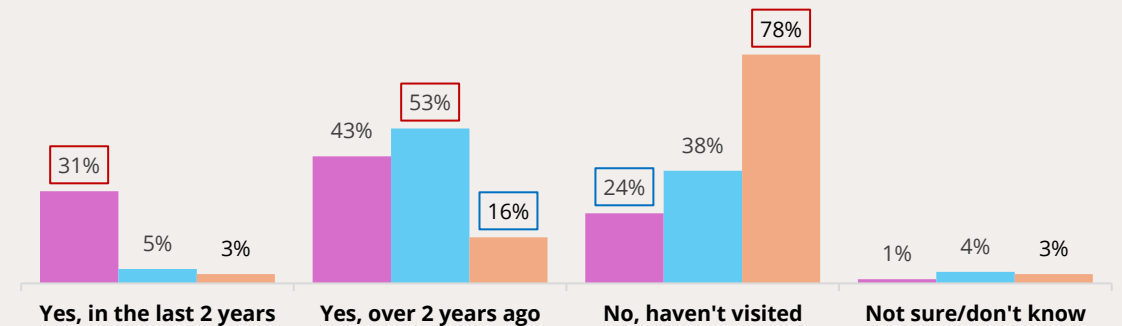
## BRIGHTON

Recent visitor Past visitor Non visitor



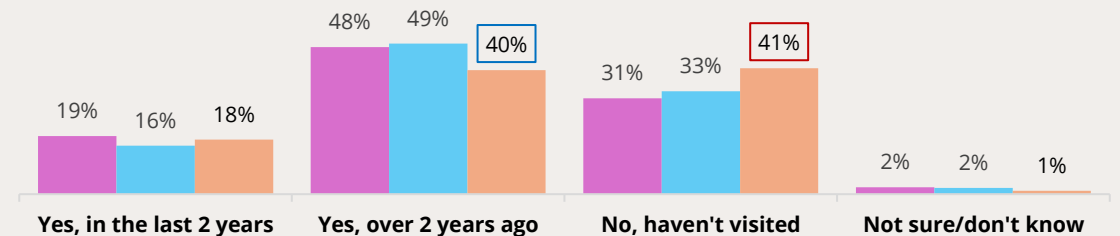
## SALISBURY

Recent visitor Past visitor Non visitor



## YORK

Recent visitor Past visitor Non visitor

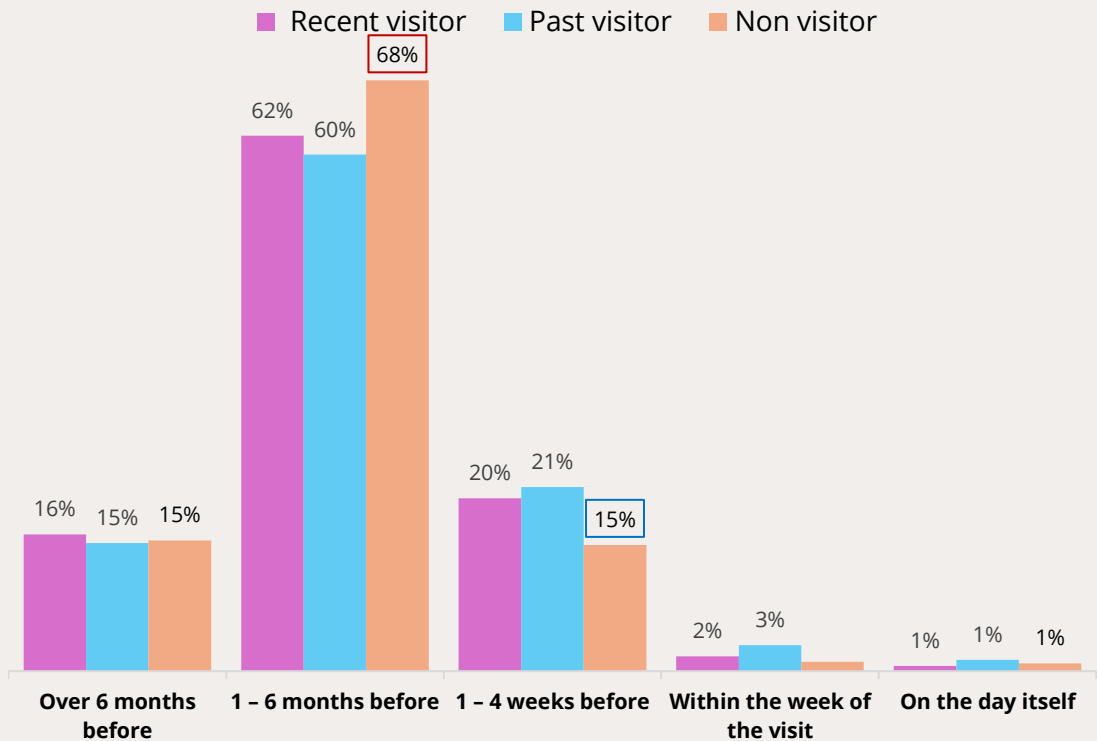


- Non visitors more likely to plan day trips and short breaks / holidays in advance.

Generally speaking, how far in advance would you usually plan a day trip within the UK?

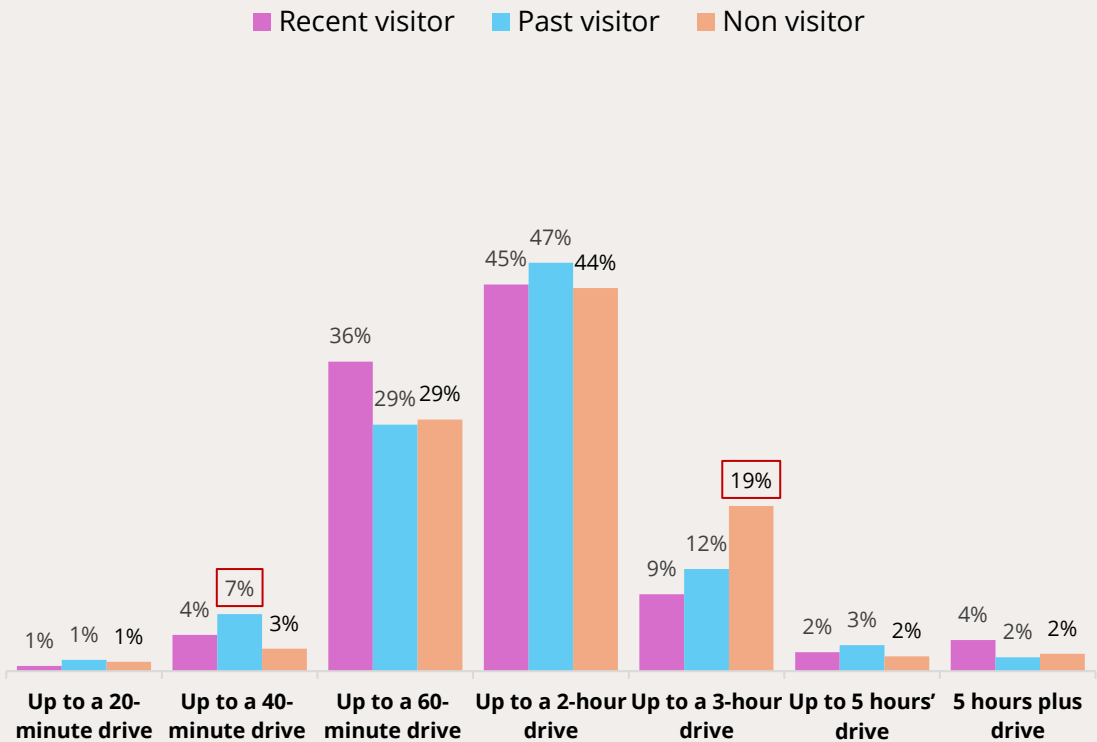


Generally speaking, how far in advance would you usually plan a short break or holiday?

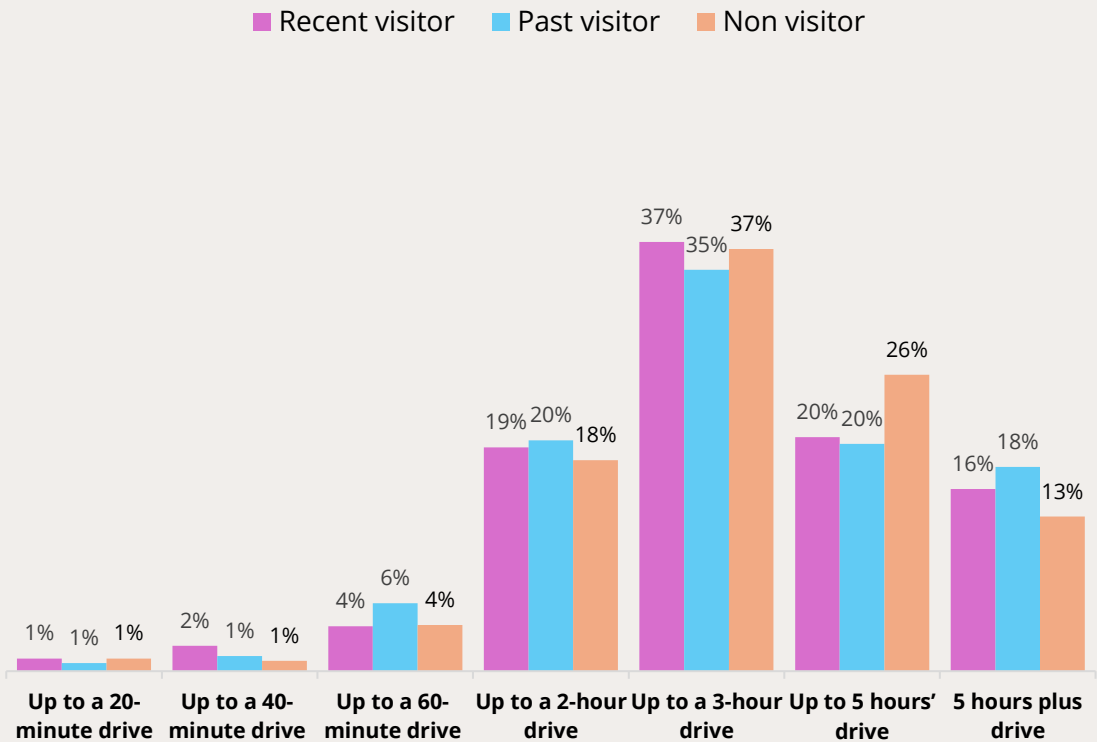


- Across all audiences, most are willing to travel up to 2 hours for a day trip.
- Up to 3 hours optimum catchment area for short breaks or holidays – across the audiences, approximately 3 in 5 willing to travel this distance.

Generally speaking, how far are you willing to travel for a day trip within the UK?

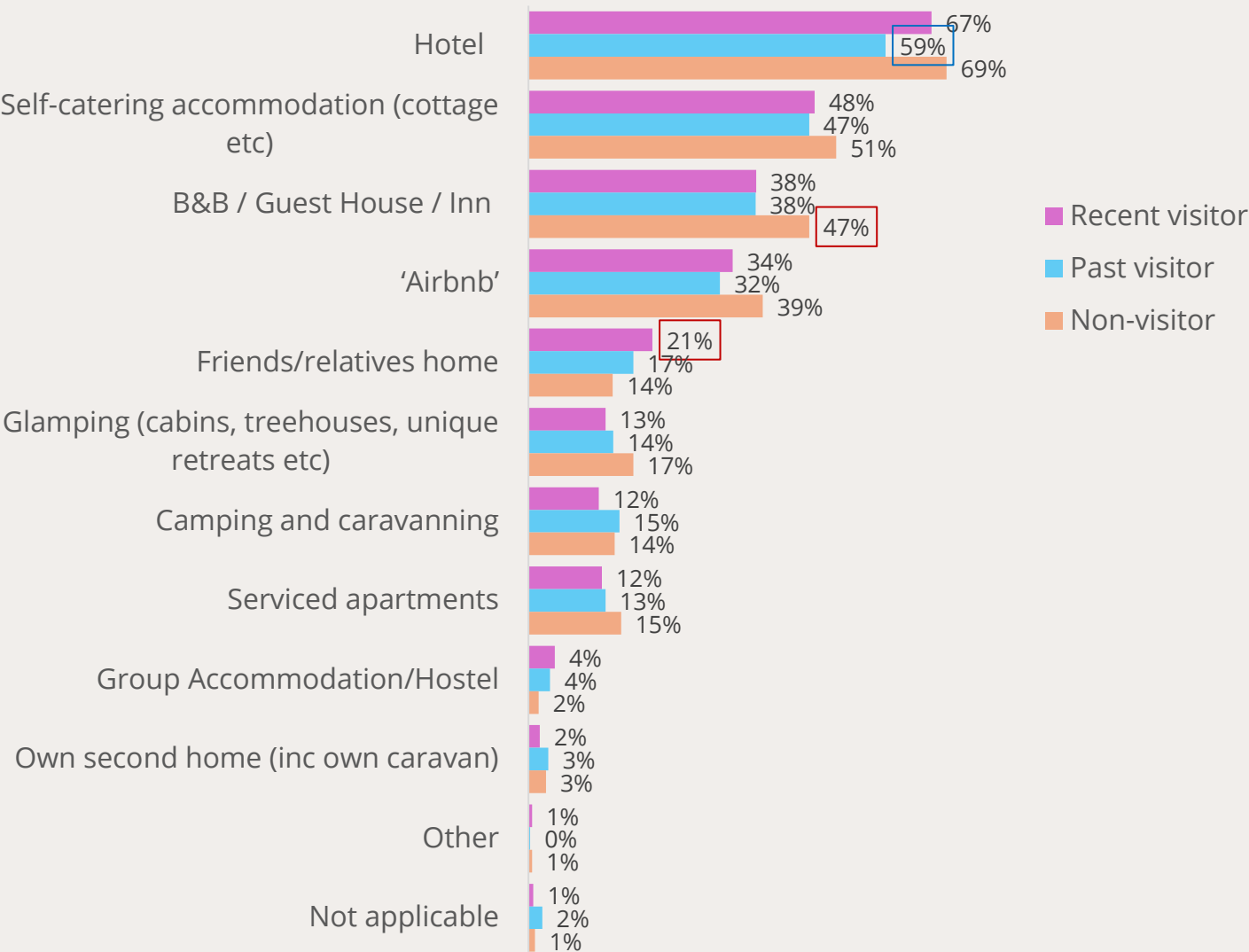


...and how far are you willing to travel for a short break or holiday within the UK?



# Preferred accommodation type

What is your preferred accommodation for short breaks or holidays in the UK?



Base: Recent visitor (360), Past visitor (305), Non visitor (350)

- Hotels and self-catering accommodation most popular.
- Camping, caravanning and glamping have niche appeal amongst families.

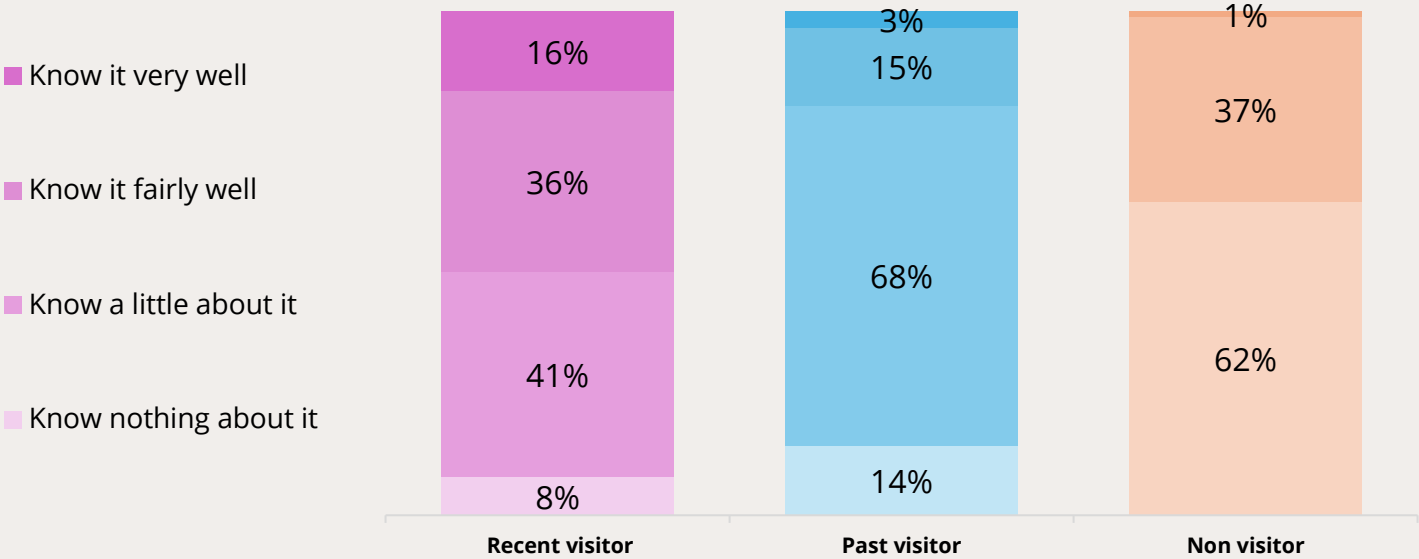
- Family groups more likely to prefer:
  - Airbnb (47%)
  - Camping & Caravanning (23%)
  - Glamping (24%)

## PERCEPTIONS OF WINCHESTER



- Little knowledge of Winchester amongst non visitors – 3 in 5 feel with they know nothing about it.
- Recent visitors most informed, but only a minority feel that they know it very well.

Which of the following statements best describes what you know about Winchester - as a place for a day trip, short break or holiday?

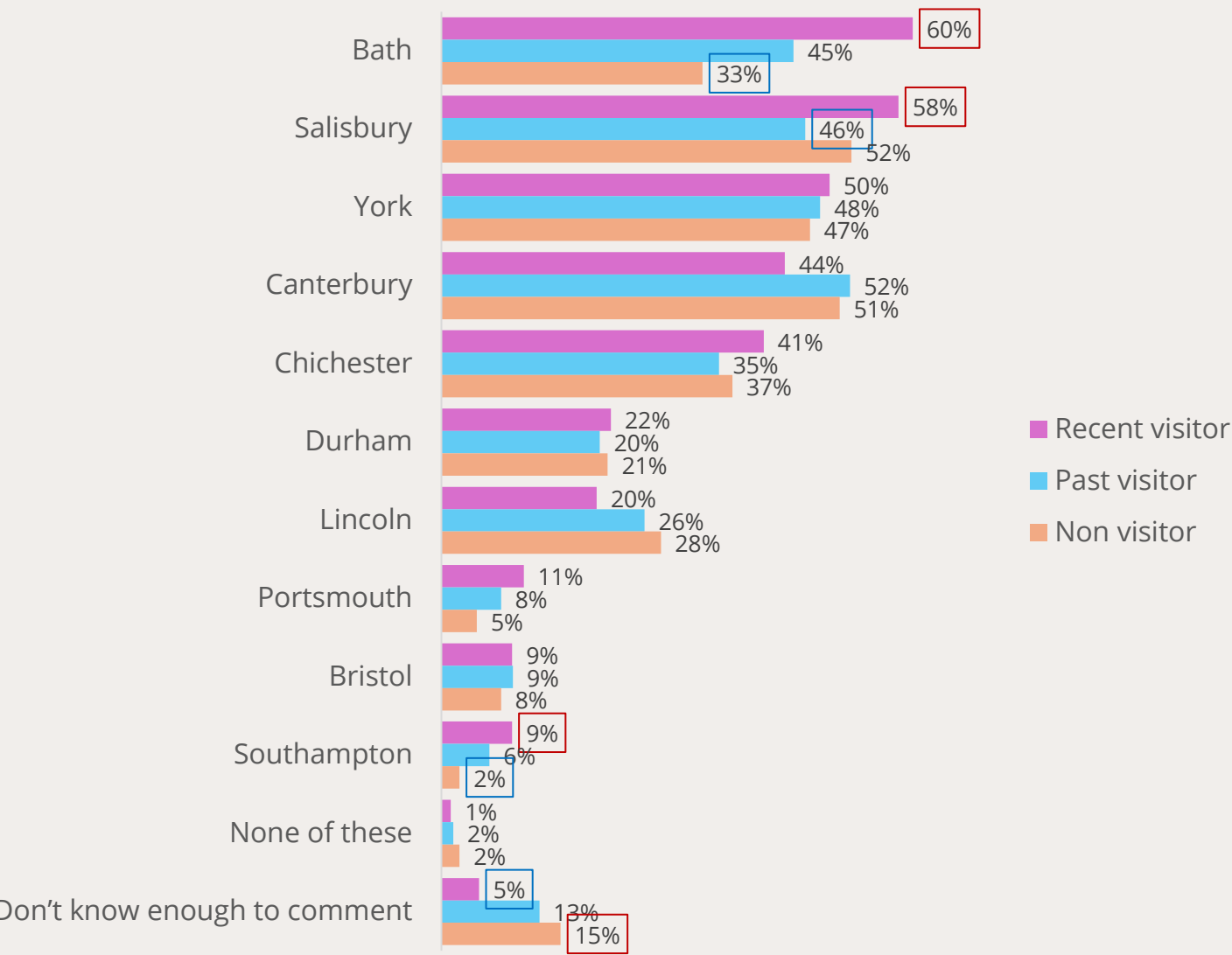




# Comparable destinations



Which of these destinations, if any, do you think are similar to Winchester, in terms of what it has to offer as a destination for a day trip, short break or holiday?

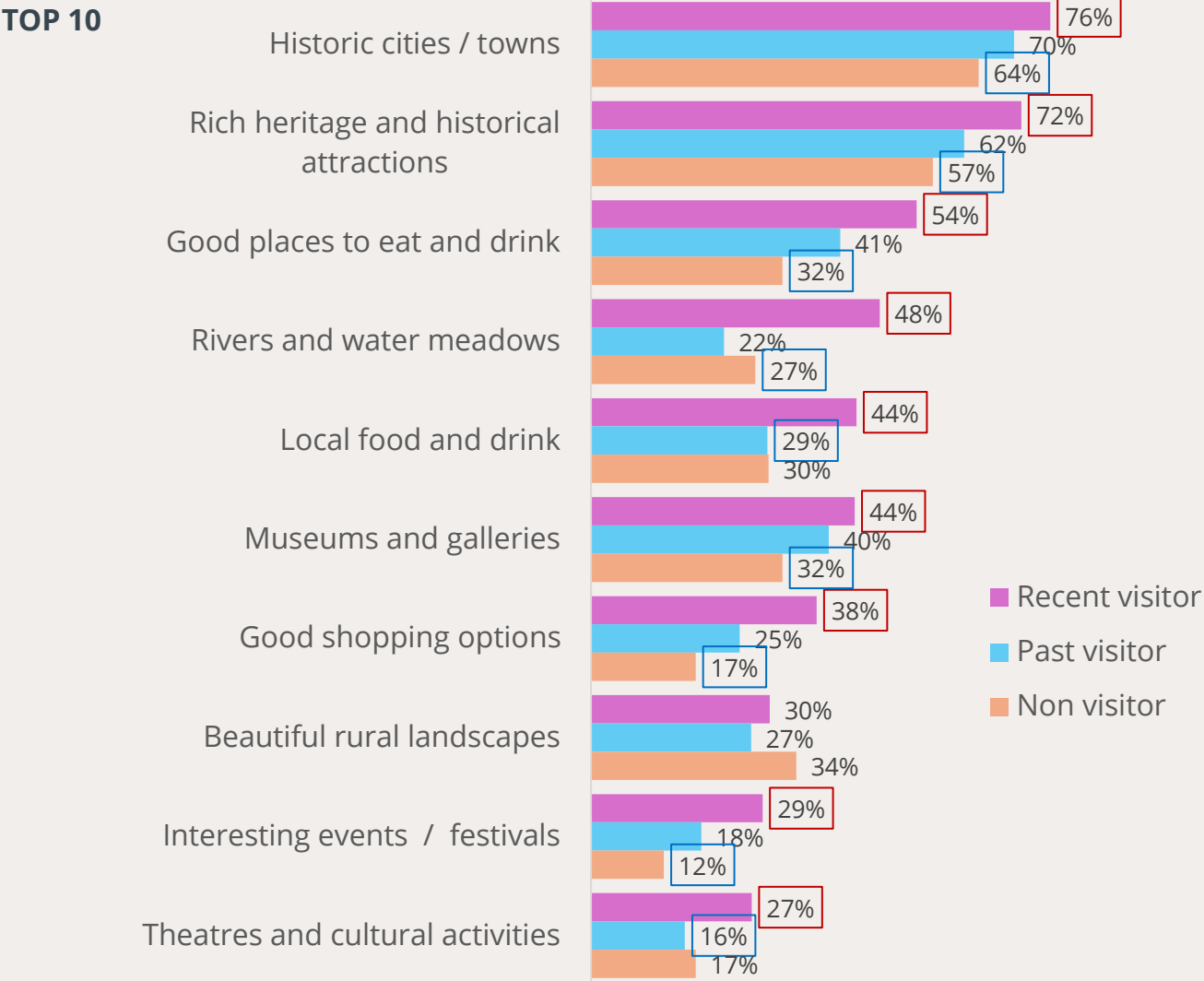


- Recent visitors most likely to see Winchester as similar to Bath and Salisbury.
- Approximately 1 in 2 non visitors anticipate that Winchester will be similar to Salisbury, Canterbury or York.

Base: Excluding those who Know nothing about Winchester: Recent visitor (333), Past visitor (263), Non visitor (132)

# Associations with Winchester

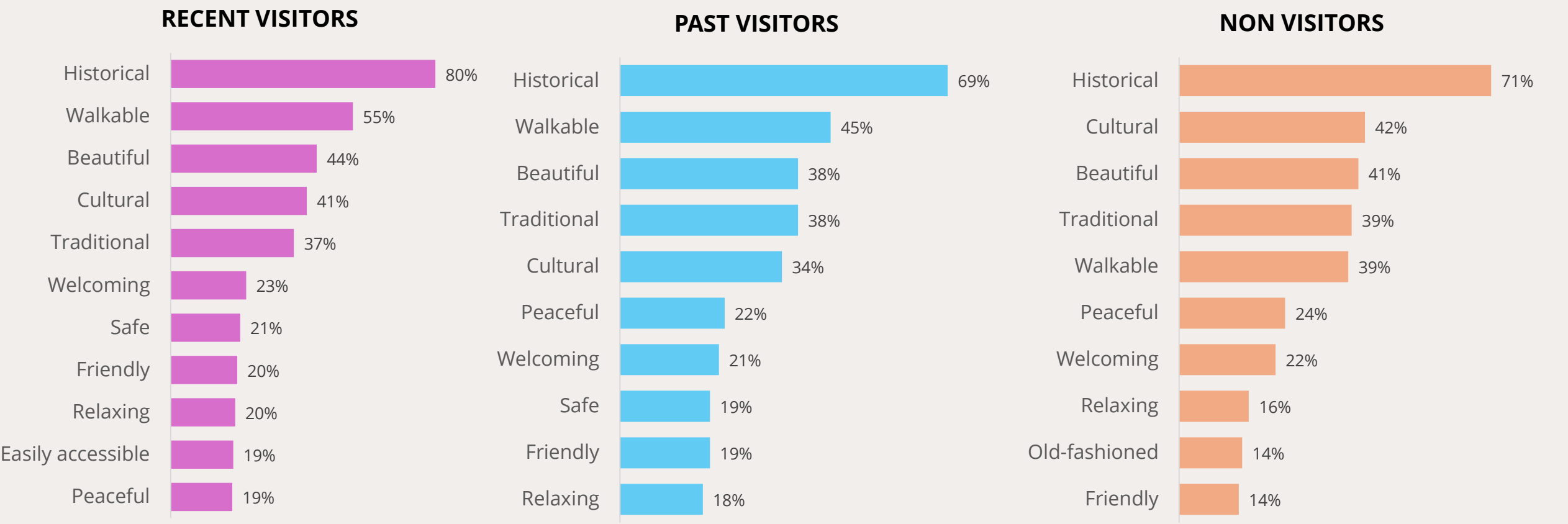
Thinking again about things that people might look for from a destination for a day trip, short break or holiday. Which, if any, do you associate with Winchester?



- All 3 visitor audiences are most likely to associate history and heritage with Winchester.
- Whilst still within the top 10 associations, relatively few associate rural landscapes with the area.
- Scope to broaden awareness of the breadth of Winchester’s offer across all audiences.

- **High degree of consistency across the three visitor audiences – Winchester is, first and foremost, historic, traditional, beautiful and cultural. Walkable also features in the top 5 across all audiences.**
- **‘Old fashioned’ makes it into non visitors’ top 10 perceptions.**

Please select up to 5 words which you feel best describes Winchester – as a destination for a day trip, short break or holiday: TOP 10

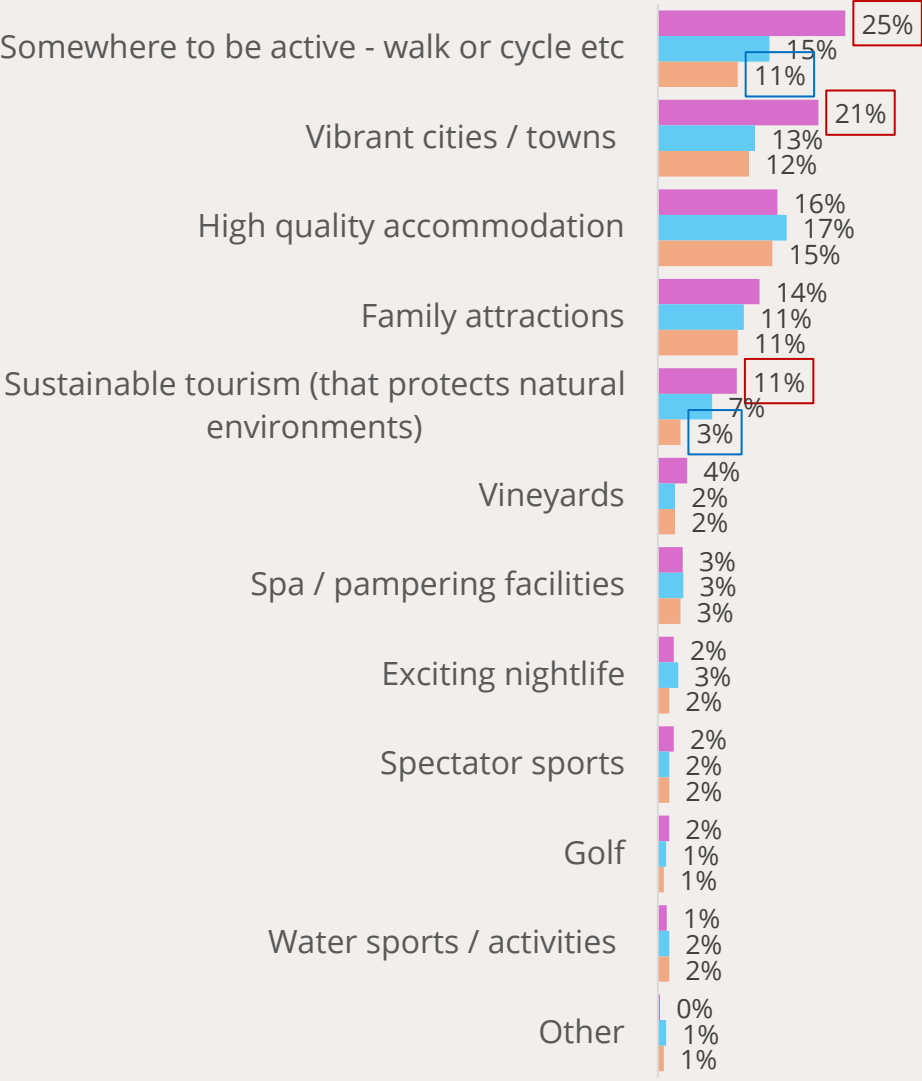
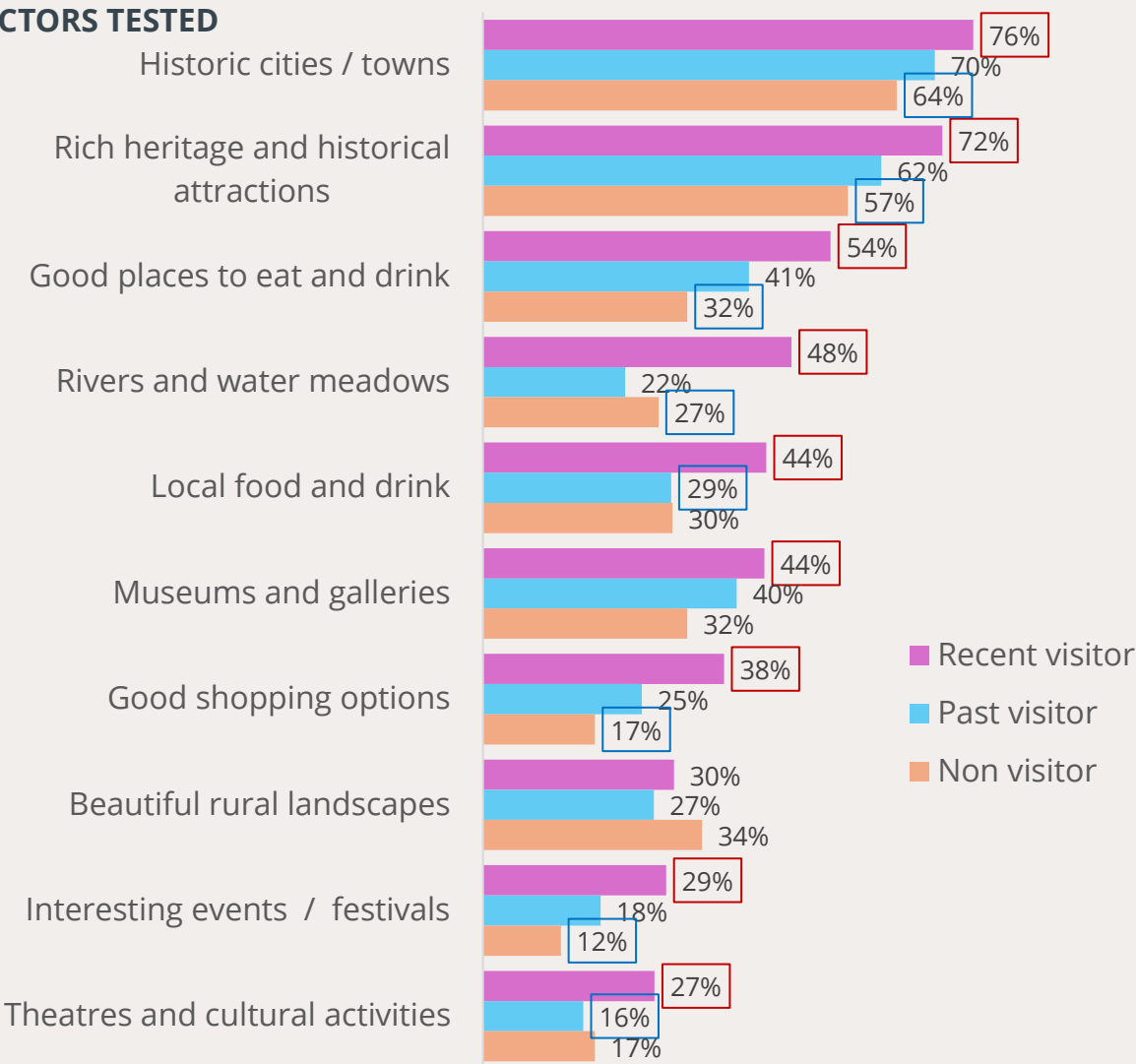


# Associations with Winchester – all factors tested



Thinking again about things that people might look for from a destination for a day trip, short break or holiday. Which, if any, do you associate with Winchester?

## ALL FACTORS TESTED



# Relationship with aspects of Winchester

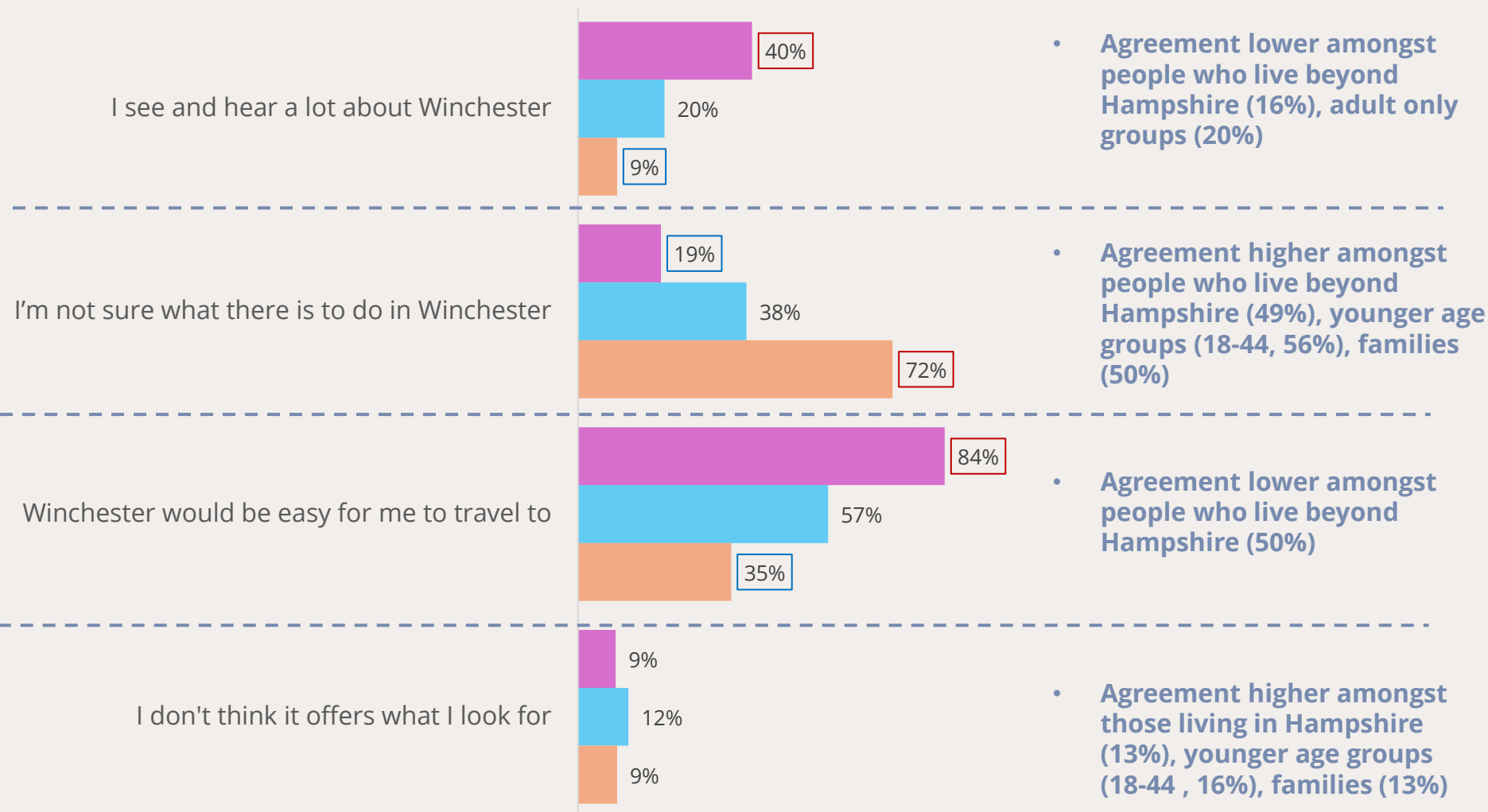
To what extent do you agree or disagree with the following statements about Winchester as a destination for a day trip, short break or holiday?

% AGREE (strongly agree or agree to some extent)

Recent visitor

Past visitor

Non visitor

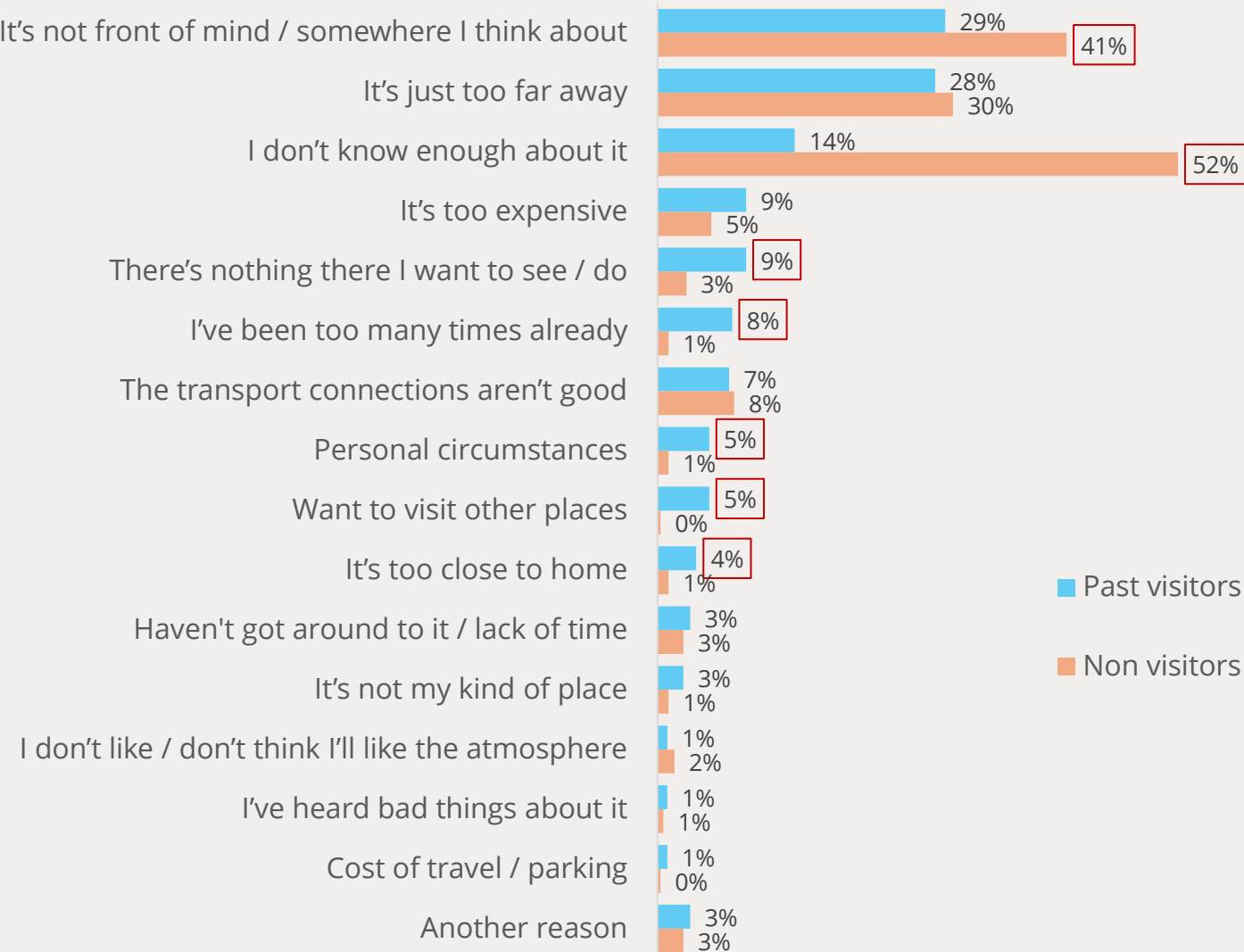


Base: Recent visitor (360), Past visitor (305), Non visitor (350)

- Very few reject Winchester's offer but low recall of information about the offer.
- Low awareness of what there is to see and do in Winchester is also apparent.
- Perceptions around ease of travel a barrier for non visitors.

# Barriers to visiting

You say you haven't visited Winchester before, or for a while. Why is that?



- A lack of awareness main barrier to visiting amongst those who have never been.
- This is also a factor amongst those who haven't visited recently, along with distance to travel.
- A desire to visit other places is a reason for not visiting amongst those who have been previously.

- **Key themes:**

## Those who know it rate it highly

"I loved visiting the castle there and also went on a ghost tour recently. It has a beautiful history and some amazing historic buildings. I would recommend it to most people especially couples, families and lovers of art and history. I found some interesting independent shops and bars there and find it a great place for a relaxing weekend away."

"Love the mix of old and new. Wonderful museums and historical sites to visit but also quirky shops and some great places to eat. Beautiful parks and gardens to relax in too."

"Beautiful & majestic cathedral. Older architecture and sites of historical interest. A good vibe walking around. Military museums. School & college buildings. Links to Jane Austen."

"Winchester has a really special feel to it. It's the kind of place that feels both peaceful and full of stories. As a day trip or short break, it's perfect if you want to slow down a bit and enjoy somewhere with charm and character. You can wander through pretty streets, pop into little independent shops, and find cosy cafés that make you want to sit and stay a while.

The Cathedral is stunning, and even just walking around the grounds or along the river feels calming. It's not too big or overwhelming – just the right size to explore without feeling rushed. Whether you're into history or just want a break from the busy pace of life, Winchester offers a lovely balance of culture, nature, and a bit of quiet magic."

- **Key themes:**

**But some small stress points amongst a highly rated place.**

“Winchester is a lovely city but, not surprisingly, choking with traffic because the layout was designed before motor vehicles. The Park and Ride is fairly useless because you don't have bus lanes. I've used the Park and Ride and still sat for ages in the same traffic jam, because the bus doesn't have any priority. I just drive in to one of the City Centre car parks now and take the hit on the parking prices. Signposting for public toilets etc., is very poor. You need more public toilets for the amount of tourists that go to the City.”

“Historical references, the parks and green spaces, river Itchen, the walks are all highlights. The only areas of weakness or in need of improvement are maybe a better choice of shops, Debenhams closing was a real shame and the river park area is run down since the old recreation centre closed. There was talk of an open-air swimming pool which would be nice. It's a good space more could be done with it to smarten it up, it lets down the rest of Winchester.”

“Parking is too, too expensive and the high street has become rather run down in recent times with many stores leaving the area.”

“Outside of central area the pavements are narrow, feels dirty, not easy to walk if mobility restricted.”



## VISITOR EXPERIENCE

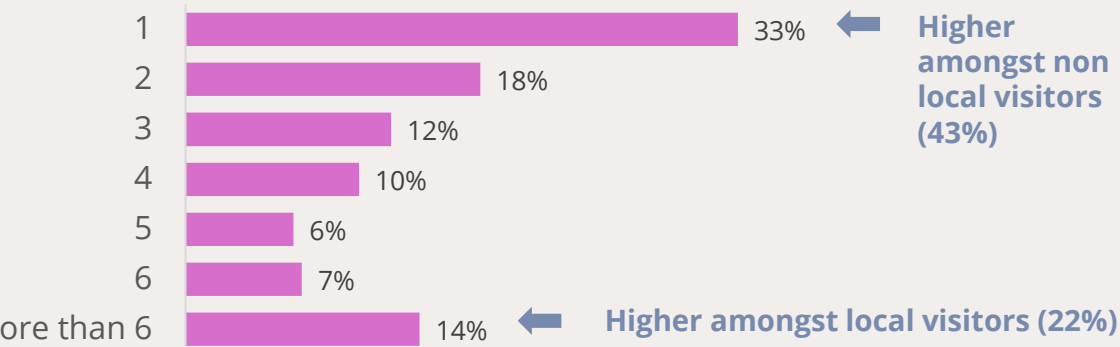


# Previous Winchester visits

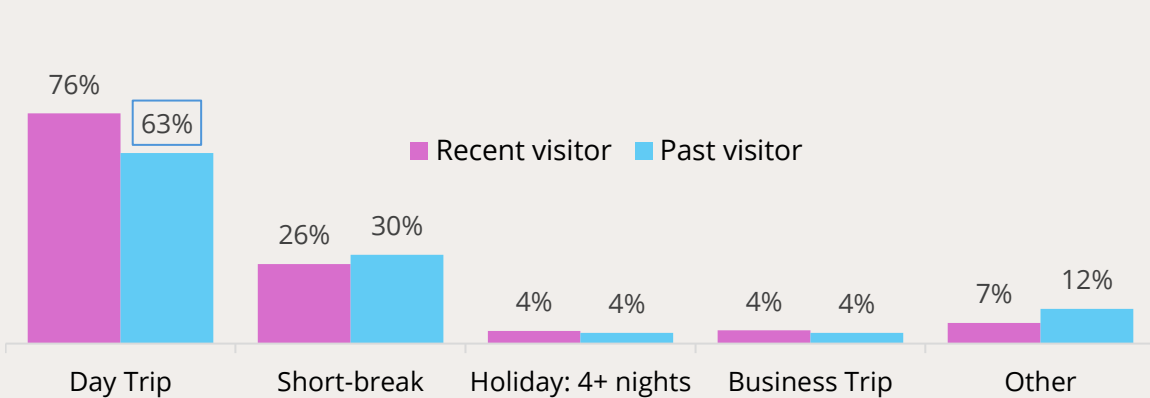
- Spread of visit frequency amongst recent visitors, but visiting 1 or 2 times in the last 2 years most common.
- Day trips most prevalent amongst both recent and past visitors.
- Most travelled by car, followed by train.
- Adult only groups most typical.

In the last 2 years, how many times have you visited Winchester?

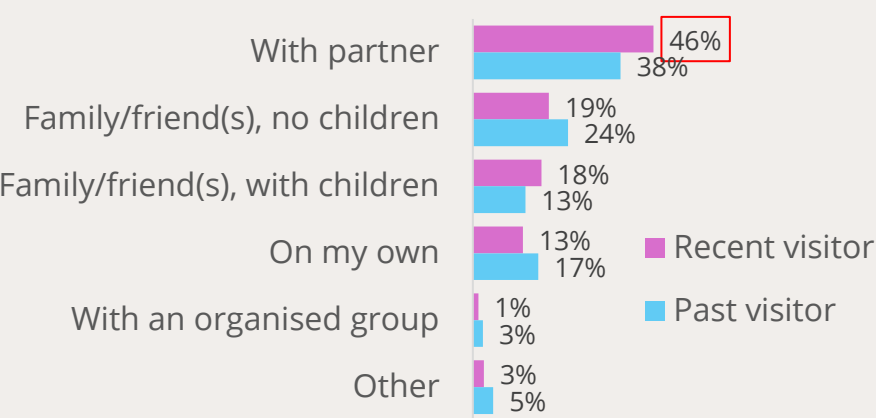
## RECENT VISITORS



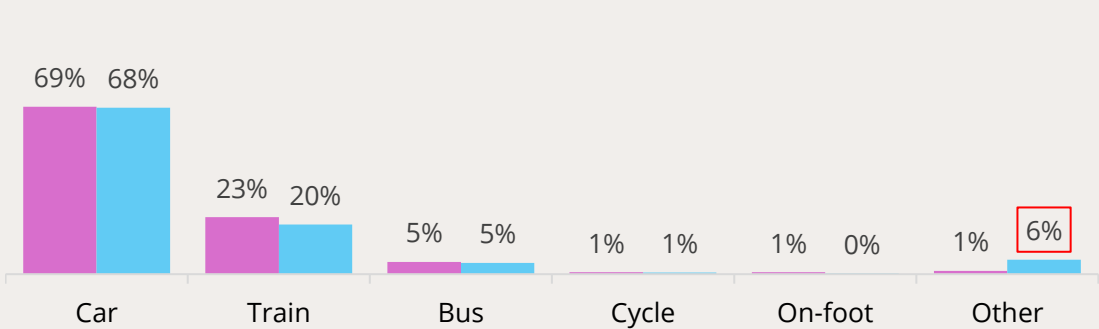
Which of the following best describes your past visits to Winchester?



Who did you visit with?



Thinking about your last visit to Winchester, what mode of transport did you use to travel there?

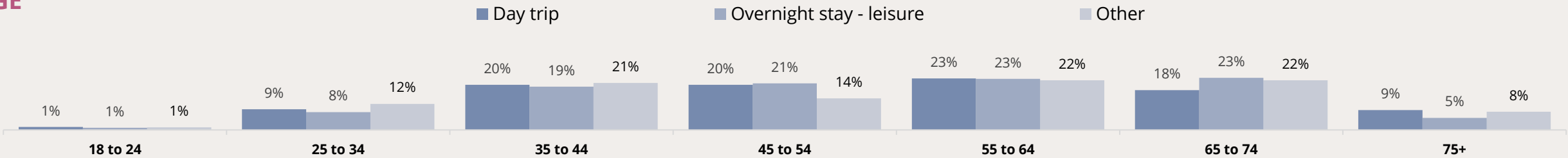


# Profile by visit type

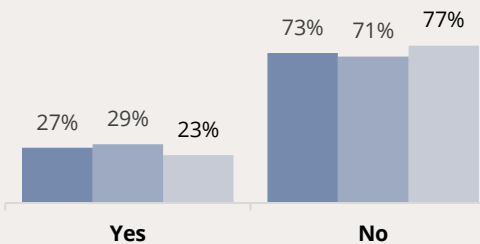
- No differences between the demographic profile of day-trippers and overnight visitors to Winchester.
- Half of overnight visitors travel from the SE region or Greater London.

ALL VISITORS

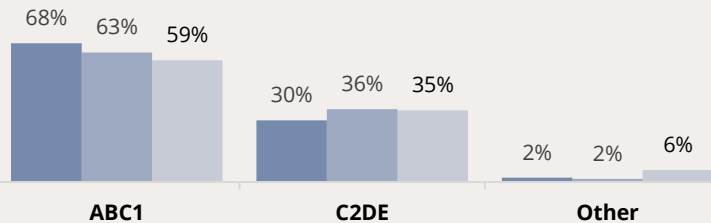
## AGE



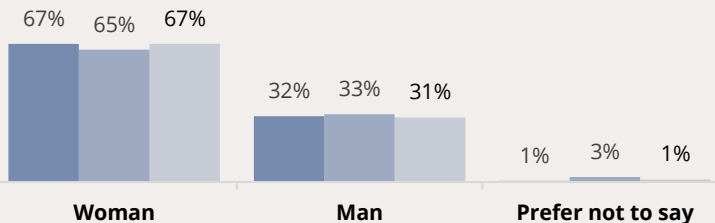
## UNDER 16s AT HOME



## SEG

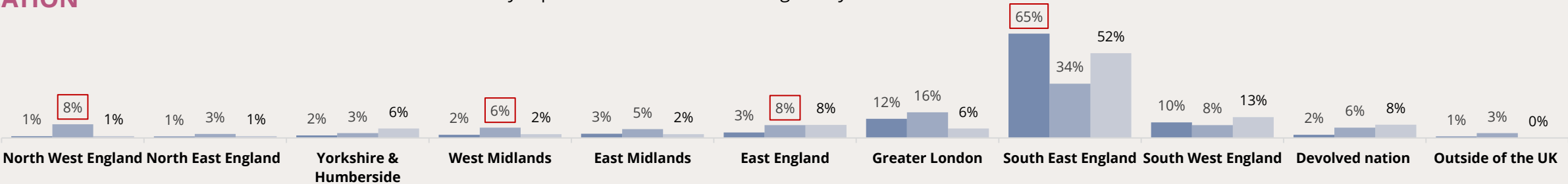


## GENDER



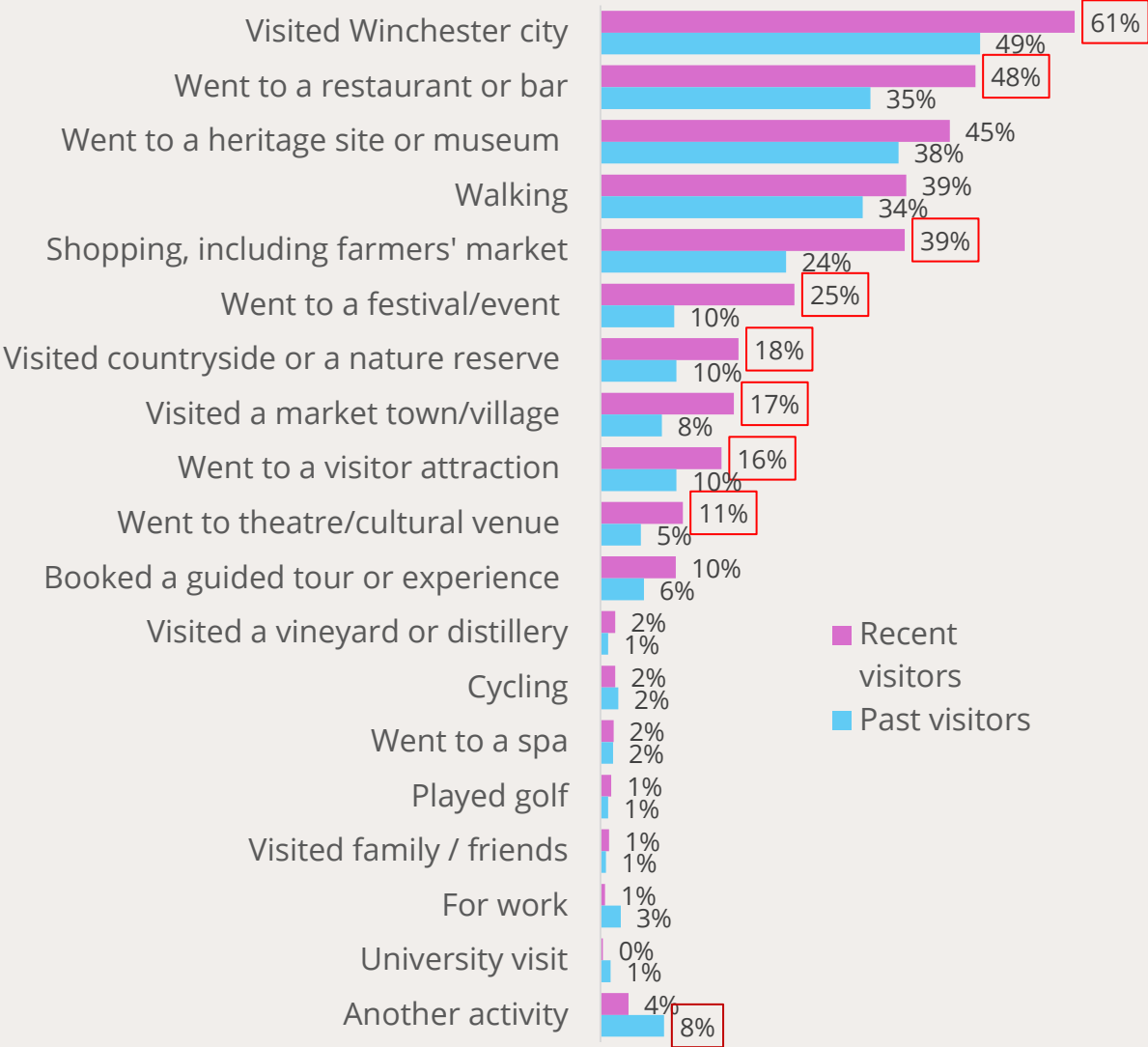
## LOCATION

Day trip Overnight stay - leisure Other



# Winchester activities

## What did you do whilst there?



- **A general visit to Winchester City most popular activity amongst recent and past visitors.**

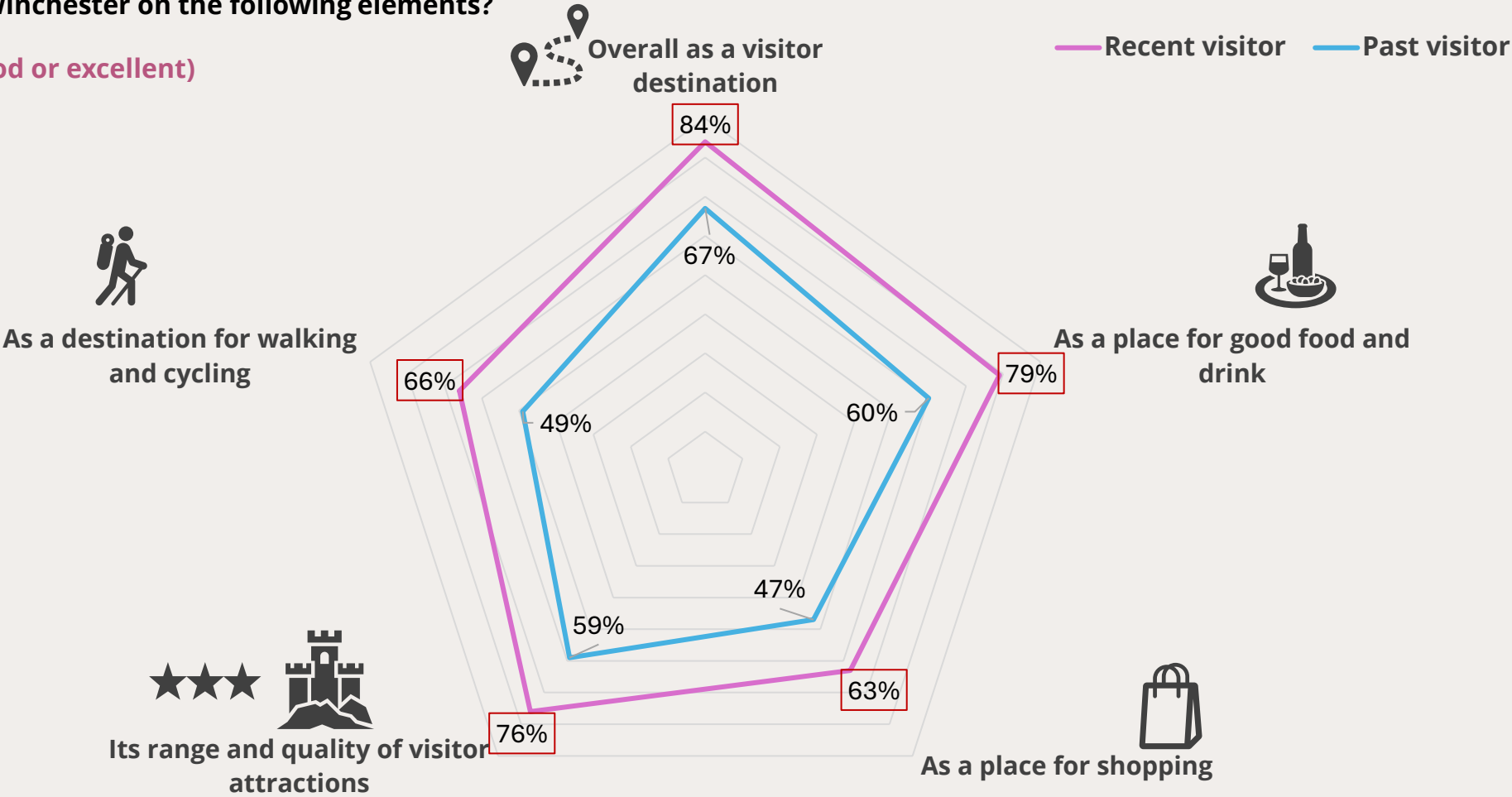
- **Non-parents and older age groups more like to have visited Winchester City:**
  - **Non-parents (59%)**
  - **55-64 (64%), 65-74 (70%), 75+ (69%)**

# Rating the visitor experience

- Recent visitors stand out as more positive than past visitors about Winchester's visitor offer.
- Indication that it is least likely to be seen as a destination for shopping and walking / cycling.

How would you rate Winchester on the following elements?

% POSITIVE (rating good or excellent)

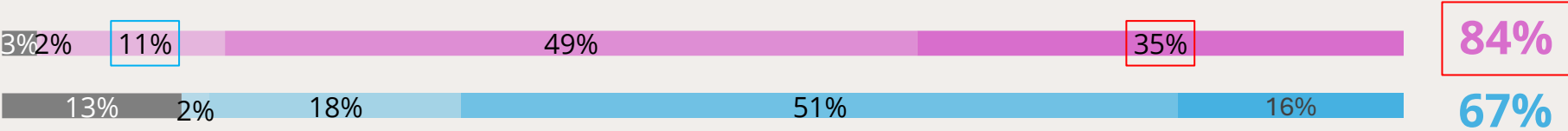


# Rating the visitor experience

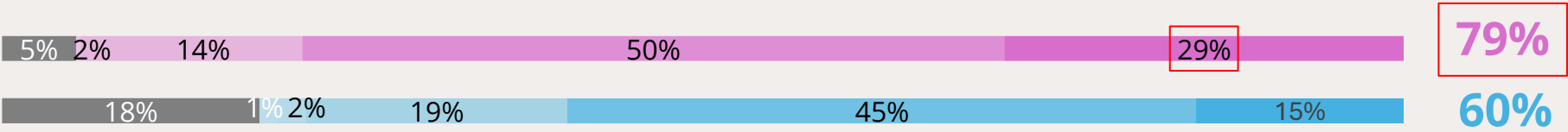


Recent visitor  
Past visitor

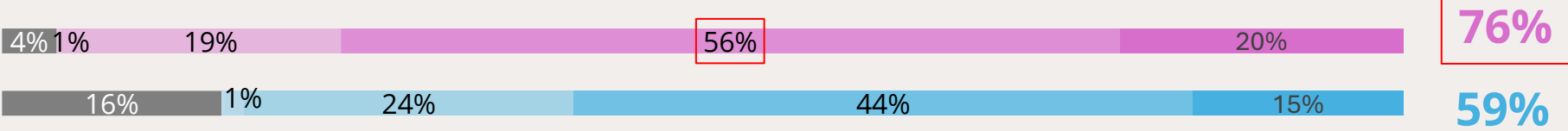
## Overall, as a visitor destination



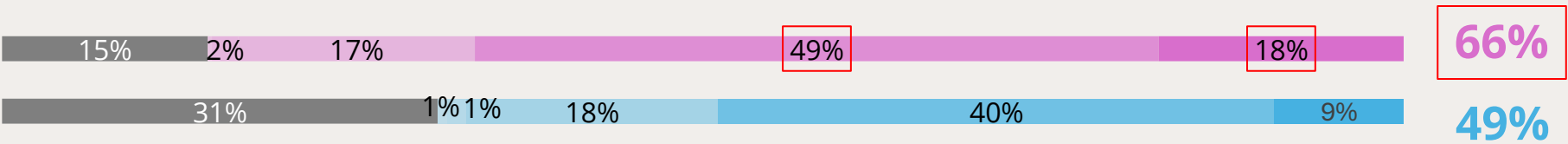
## As a place for good food and drink



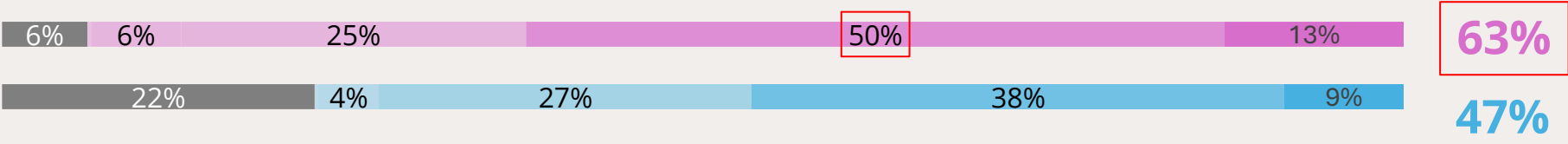
## It's range and quality of visitor attractions



## As a destination for walking and cycling



## As a place for shopping



Can't say Terrible Poor Average Good Excellent

## RESPONSE TO VISITOR OFFER



- Almost unanimous positive response to Winchester's visitor proposition, although notable variation in strength of positivity by audience.
- Proposition resonates best with older age groups.



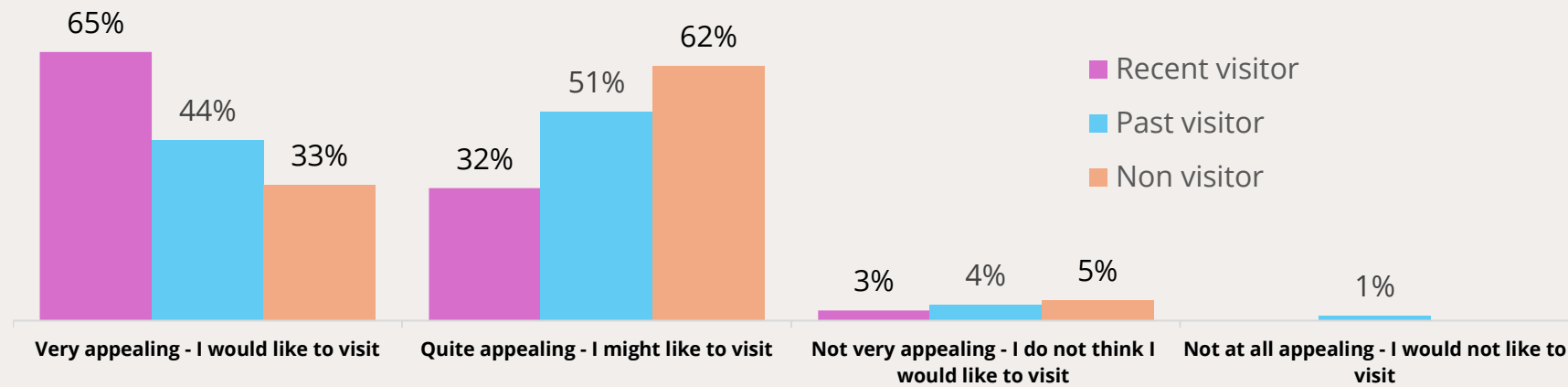
## Vibrant. Ancient. Cultured.

A city steeped in history, Winchester is England's ancient capital and former seat of King Alfred the Great.

Today Winchester combines the best of city life with the freshness of the surrounding countryside. One hour from London, this is England as it used to be.

With world class attractions and architecture including a magnificent college, award-winning pubs and restaurants and a tempting array of independent shops. This culturally rich medieval city is surrounded by idyllic Hampshire villages and the fabulous rolling countryside of the South Downs National Park.

How appealing does Winchester sound to you as a place to visit?



By Age - % rating very appealing - I would like to visit:





- **Key themes:**

**The combinations that Winchester can offer – traditional and contemporary; city and rural.**

“I really like Winchester because it has such a charming mix of history and modern life. The city is known for its beautiful cathedral and historic buildings, which gives it a unique character. Plus, it's not too big or too small, so it feels like a close-knit community but still has plenty of shops, restaurants, and cultural events. I also like that it's close to the countryside, so you can easily get out for walks or countryside days. It just feels like a nice balance between city and nature, which is perfect for me.”

“I'm a sucker for history and culture, and Winchester ticks those boxes big time. The city has this genuine, lived-in feel that isn't overly polished or touristy, which I really like. It feels like a place where you can just wander around, discover cool little spots, and soak up centuries of stories without feeling rushed. Plus, the combination of beautiful architecture, green spaces, and riverside walks sounds like a perfect way to recharge. The pubs and cafes also promise good local vibes and food, which is always a bonus. For a short break, it sounds like a peaceful yet interesting escape from the usual city buzz.”

“I love historic towns and cities that offer history, good places to eat and surrounding areas that are nice to visit such as the South Downs.”

“It is a perfect blend of ancient history and the vibrancy of modern life. Its proximity to London made it easy for me to explore the city whenever I wanted. The surrounding countryside and the South Duchess National Park also captivated me, offering the perfect amount of natural beauty and space to relax.”

## What does / does not appeal about Winchester's visitor proposition

- **Key themes:**

### Contrast with and ease of travelling from London

"Appeals to me as a break from London - a change of scenery , beautiful scenery, perhaps delicious local food, a safe cycle around beautiful countryside, delicious dinner in an independent restaurant, an over night stay somewhere luxurious and a potter around a pretty town."

"I love that it's easy to get to from London and my kids are very interested in history."

"I am very interested to hear and see more about Winchester as a former capital, and to see historical buildings etc in general. Being only an hour from London, it also might be more easily reached for me than I thought."

"It sounds like a historical place with plenty to see. I also like the idea that it's surrounded by a rural landscape, and that it's not too far from London so I could combine it with other travel."

"Easy journey by train from London. Plenty to see and do of historical interest. An easy place to walk around."

- **Key themes:**

Description can pique interest, but some need more information about things specific to their interests

"I like old buildings, history, but I am just not sure if there is enough to do around."

"I know nothing about it and I would want to know more about family attractions like wildlife parks, theme parks, zoos before I decide. My family wouldn't be interested in the historical attraction mentioned before."

"Could say a bit more about the family friendly parts - Marwell Zoo and the science museum."

Language used in description can jar with some

"Clear what is on offer, and seems credible. Not too sure I want England how it used to be? There were some terribly dreary hotels and B+B's in England! Food was dreadful, pubs shut on Sundays, and there were no wheelchair accessible toilets (at least that's how I recall it)."

"The style of photography and the wording feels a bit dated and the same information could be conveyed in a more vibrant way targeted at young families."

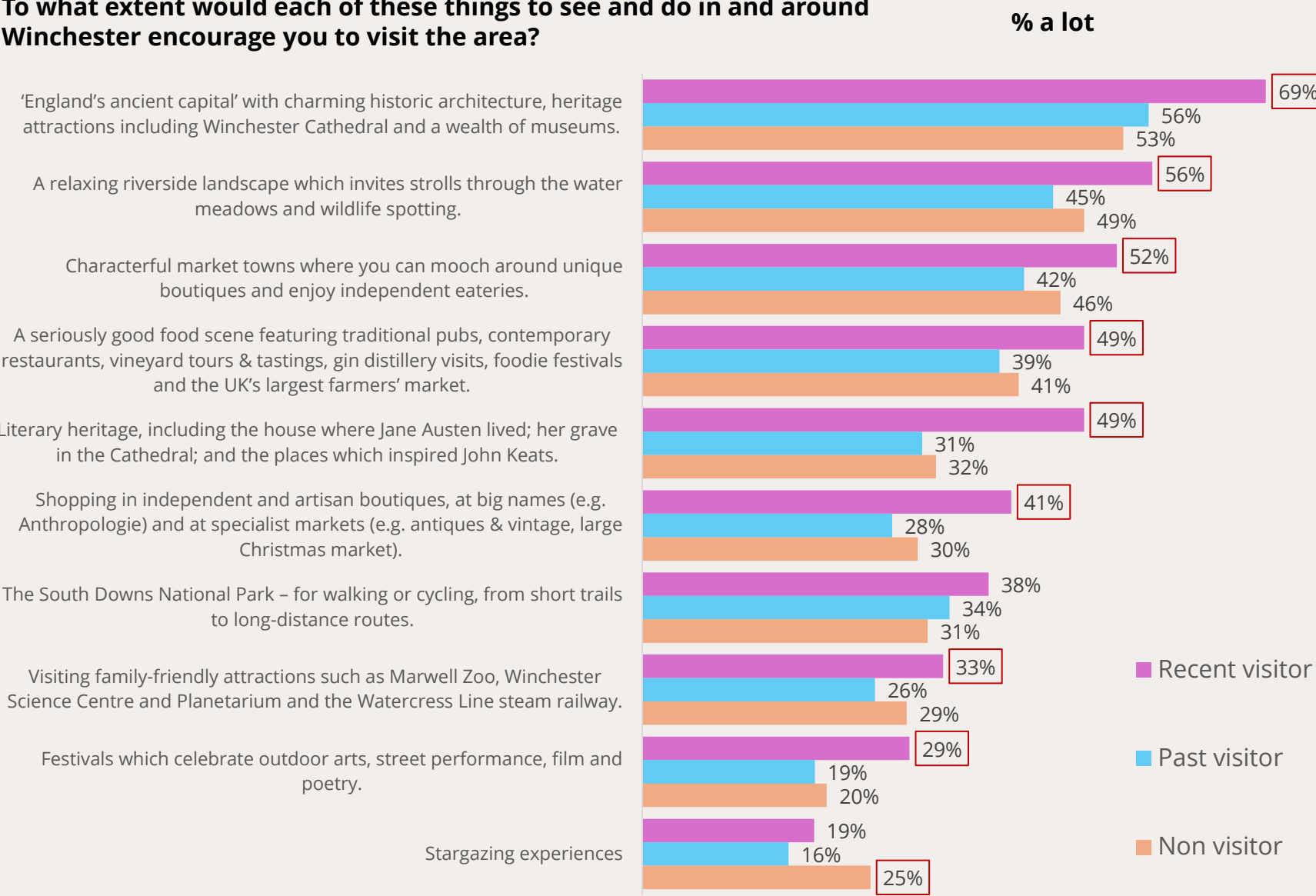
"I like what it said about Winchester, the only part I did not like was 'England like it used to be' I feel like this makes it sound quite traditional, non-diverse and not the sort of place I would feel comfortable."

"This is England how it used to be' jarred. I would reframe the sentiment. 'Used to be' sounds like good old days and might be deemed as negative. 'This is a place which has a sense of stepping back in time' - not exactly like this ... but more evocative."

# Encouraging visits



To what extent would each of these things to see and do in and around Winchester encourage you to visit the area?



Base: Recent visitor (360), Past visitor (305), Non visitor (350)

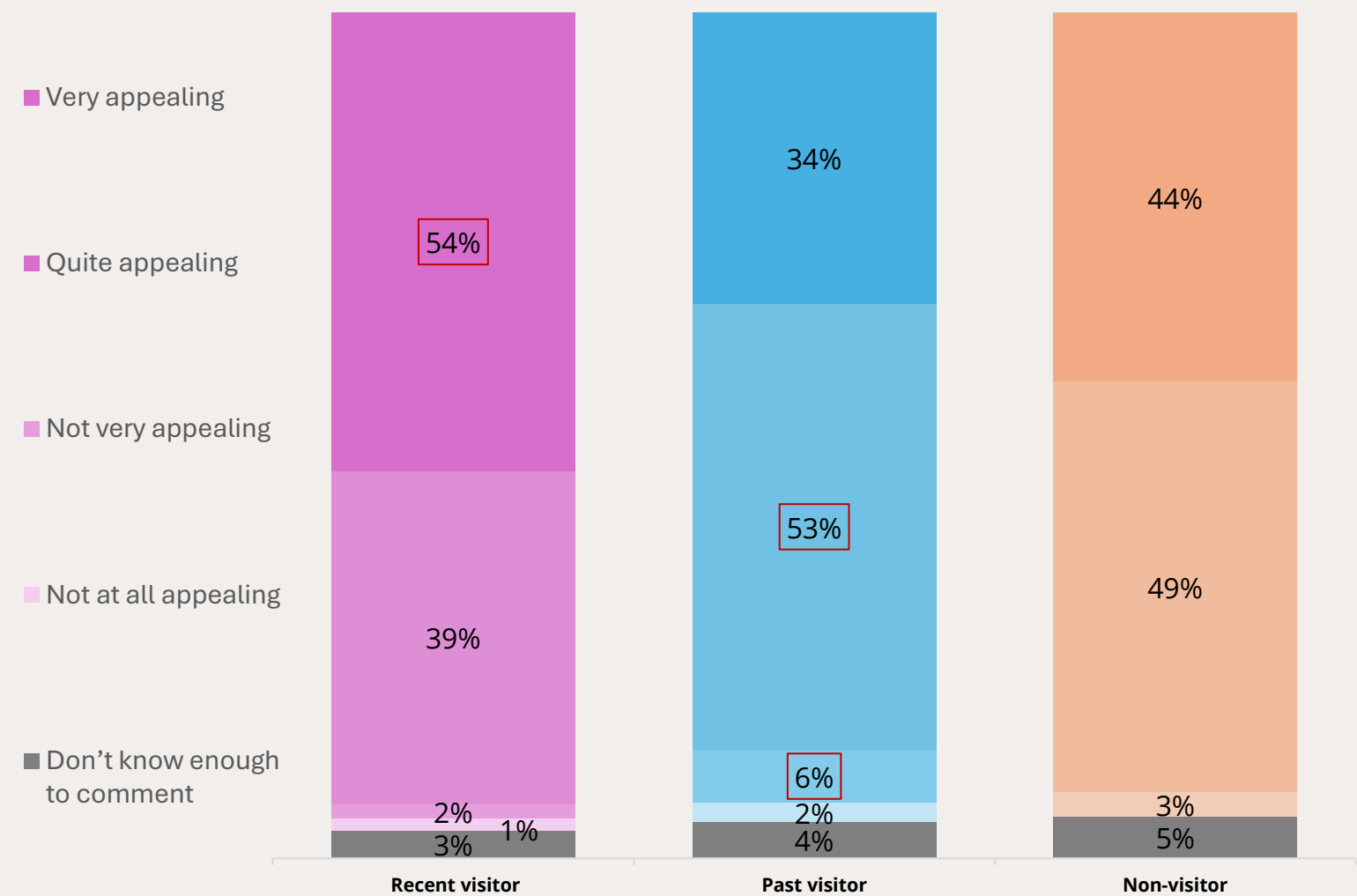
- Factors which describe Winchester's sense of place most motivational, across all audiences.
- Consistently higher ratings amongst recent visitors suggests that having a recent experience of the area can positively shape perceptions.
- Stargazing experiences are more motivational to non visitors compared to other audiences.
- Variations by demographics and life stage apparent. (see next slide)

- Audience profiles more likely to be motivated by factor - % stating a lot

The South Downs National Park – for walking or cycling, from short trails to long-distance routes.	ABC1s (38%) Families (42%)
‘England’s ancient capital’ with charming historic architecture, heritage attractions including Winchester Cathedral and a wealth of museums.	55-64 (65%) 65-74 (72%) 75+ (76%)
A seriously good food scene featuring traditional pubs, contemporary restaurants, vineyard tours & tastings, gin distillery visits, foodie festivals and the UK’s largest farmers’ market.	25-34s (55%) ABC1s (46%) Families (48%)
Literary heritage, including the house where Jane Austen lived; her grave in the Cathedral; and the places which inspired John Keats.	55-64s (44%) 75+ (48%)
Characterful market towns where you can mooch around unique boutiques and enjoy independent eateries.	25-34s (57%)
A relaxing riverside landscape which invites strolls through the water meadows and wildlife spotting.	75+ (63%)
Visiting family-friendly attractions such as Marwell Zoo, Winchester Science Centre and Planetarium and the Watercress Line steam railway.	25-34s (41%) 35-44s (36%) Families (49%)
Shopping in independent and artisan boutiques, at big names (e.g. Anthropologie) and at specialist markets (e.g. antiques & vintage, large Christmas market).	25-34s (44%)
Festivals which celebrate outdoor arts, street performance, film and poetry.	25-34s (31%) Families (29%)
Stargazing experiences	

# Appeal of places that offer access to city & countryside

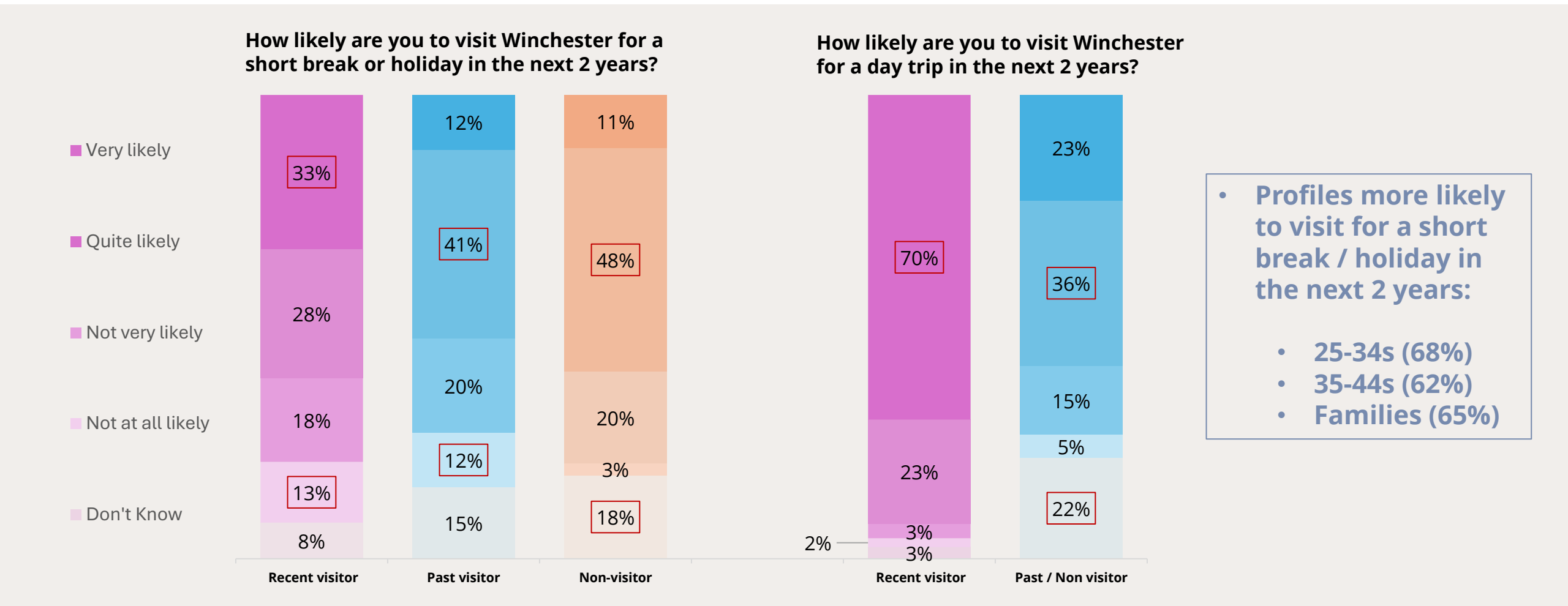
Winchester can offer visitors access to both city and countryside. How appealing to you are short breaks and holidays which offer this combination?



- Short breaks which offer access to both city and countryside highly appealing across all visitor audiences.

# Likelihood of visiting Winchester in the next 2 years

- Good levels of interest in visiting Winchester for a short break or holiday, particularly amongst recent visitors.
- Interest in visiting for a short break / holiday higher amongst those aged 25 to 44 and those with children.



## KEY FINDINGS





- **Who is currently visiting Winchester and why?**

Winchester visitors are typically older (aged 55+) and affluent. They usually come for the day, travelling by car from Hampshire or another part of the South East. Adult only groups outnumber families, at a ratio of 3:1.

They enjoy places rich in heritage and with a good hospitality offer. The majority of recent visitors (those visiting within the last 2 years) are visiting both Winchester City and District, although it is noteworthy that the Winchester area isn't commonly associated with rural landscapes.

Approximately 3 in 10 visitors stay overnight. Demographically similar to day trippers, they travel further. Half come from the South East and London, the largest market, whilst approaching 1 in 5 travel from the Midlands / East England.

- **What is Winchester's profile and positioning?**

Winchester has a varying profile, with few feeling that they are very familiar with the area, even amongst recent visitors. Those who have never visited have little knowledge of it, with 3 in 5 knowing nothing about it. Low recall of comms is a factor, particularly amongst those who live beyond the Hampshire area.

When known, target audiences' perceptions of the Winchester area are generally favourable, although perhaps city-centric. It is seen / anticipated to be historical, first and foremost, but also traditional, beautiful, cultural and walkable.

There is a need to broaden awareness of the breadth of Winchester's offer across all audiences, to fill gaps in knowledge about what there is to see and do, and to ultimately motivate visits.

- **What scope is there to engage new audiences?**

All audiences, including those who have never visited, respond positively to Winchester's Vibrant. Ancient. Cultured. proposition. It aligns with the prevalent desire to visit historic cities and towns. They like the combinations that Winchester can offer – the traditional and contemporary; the city and rural – and that it is an easy train journey from London.

Family short breaks and holidays could be a potential area of growth, as demonstrated by a greater willingness amongst families to visit the Winchester area in future. Communicating the breadth of Winchester's offer and going beyond a focus on the historical centre is likely to be needed for successful engagement. They are also likely to want to choose from a wide range of accommodation types, including more contemporary options such as Airbnb and Glamping.

- **Which aspects of the visitor offer are most likely to engage**

Life stage influences response to specific aspects of Winchester's offer. Older audiences respond well to the idea of experiencing charming historical architecture and relaxing by the river.

These also appeal to those who are younger, but this audience have a broader set of place requirements. The promise of an independent / artisan hospitality and retail has potential to engage, along with more information on family friendly activities.

A stylized icon of three blades of grass, rendered in dark blue, positioned to the left of the text.

**Bluegrass**