

WINCHESTER DISTRICT TOURISM STRATEGY 2026-2030

BASELINE REPORT AND OUTLINE
RECOMMENDATIONS



OVERVIEW

- Blue Sail has been commissioned to help us develop a new tourism strategy for this important sector of the district's economy
- The strategy will identify opportunities to further grow sustainably and inclusively over the next ten years.
- To do this it will recognise:
 - what the district has now
 - what can be developed
 - what needs to be done
 - outcomes that are shared

Policy committee are asked to:

- Note the findings outlined in the baseline report
- Comment upon the emerging themes and priorities

WHAT WE'VE DONE

We asked Blue Sail to create a detailed baseline review of the destination, data and policy, including;

Audit and SWOT of Winchester District's Visitor Economy

Performance and profile

Assets and gaps

Challenges and external trends

Market assessment: perceptions and competitors

The Baseline Report can be found [here](#).

WHAT WE'VE DONE - Summary

Between May and August the consultants have:

Data Review

- Economic impact (volume/value)
- GB Tourism Survey
- IPS/ONS
- Comparator analysis
- COSTAR hotel data

Marketing Review

- Destination websites
- Winchester district business websites
- Media coverage & perceptions
- Social media

Destination Audit

- Audit & mapping
- Themes
- Strengths & gaps
- Accommodation stock
- Events review

Engagement

- Consultation x 18
- Business survey - 65 responses
- Stakeholder workshop x 2 - C60 participants

Visitor Panel Survey

- 1015 responses
- Recent & past visitors
- Non-visitors

Policy Analysis

- 24 documents
- National, regional & local

Visitor Markets & Trends

- National visitor trends
- Current markets
- Growth markets

WHY WE'VE DONE IT..

The visitor economy is important to Winchester district

Over 8 million visits annually

Supports our local communities through investment in jobs, facilities, services

- Generates £292 million for the local economy
- Supports 5760+ jobs, representing 7% of district employment

Contributes to the image, profile and reputation as a place to do business, live, relocate, study with Winchester district recognised for its:

- rich history and heritage
- unique city, market town, and countryside blend
- location within the South Downs National Park
- strong cultural offer and vibrant food & drink scene

WHAT WE'VE FOUND – Data and Offer

- Visitors are mainly visiting for the day (97.3%) and their spend is lower relative to neighbours and comparators, Southampton, New Forest, Stratford Upon Avon and Chester
- Although our staying visitor numbers are relatively low (2.7% of total visits) they do account for 19% of overall tourism spend
- Accommodation sector performs well (80%+ occupancy for 6 peak operating months per year)
- A rich events offer and accommodation including some 'destination hotels'
- We are easy to reach, and the city is walkable but accessing rural Winchester is harder
- Independent retail offer is also a strength
- Visitor offer falls into four key themes:
 - history & heritage,
 - foodie offer,
 - nature & outdoors,
 - visitor attractions

WHAT WE'VE FOUND – Marketing

Strong	Could be stronger
Heritage city positioning	Potential to create a stronger narrative
Proximity to London & Jane Austen connection well understood	
Pride around food & drink, especially farmers' markets	Vineyards are overlooked and not associated with city.
Retail offer viewed positively and Christmas market media reputation	
Gateway to South Downs National Park is a common phrase	Landscape within city/market towns doesn't have profile expected
Social media creators give city a 'lifestyle' spin: great walks, views, shops.	
Marketing nods to cultural/festivals scene	Little to reinforce 'vibrant cultured' positioning

WHAT WE'VE BEEN TOLD – Engagement Businesses

Priorities for businesses

- ☐ more **collaborative marketing** opportunities and coherent visitor offer
- ☐ **younger** visitor markets visiting with a complementary **evening offer**
- ☐ inclusive & accessible tourism leadership
- ☐ **easier to move around the district** and city, incl. visitor **wayfinding**
- ☐ more **visitor accommodation** that fits our markets and opportunity

Want the local authority to

- ☐ **support destination marketing**
- ☐ **improve tourism data**, research and insights to encourage private investment
- ☐ **be the convenor** to bring the sector together
- ☐ **facilitate training** support e.g. customer skills, marketing and digital

WHAT WE'VE BEEN TOLD – Engagement Visitors

Visitor profile: adults out number families 3:1

		However.....
Travel behaviour:	Main audience are frequent day-trippers	there is competition from other potential day trip destinations.
Motivations for visiting a place:	Heritage / towns lead reason	audience are looking for complete experience and offer which includes food and drink, rural.
Perceptions:	Strong association with history / heritage	3 in 5 non-visitors know nothing. Some perceive as 'old-fashioned'.

Implications:

- Family short breaks an area of growth, but don't lose sight of core audience.
- Younger audiences have broader place requirements and a wider variety of accommodation options.
- Need to improve awareness of the offer among target audiences.

WHAT'S THIS TELLING US

We are good at and can build on

Heritage

Food and Drink

Independent retail and Christmas market

Adult visitors

Day trips

Easy to get to and accessible City

We can get better

Potential to enrich to a 'heritage plus' approach

Food and drink experiences and tours

Make more of the landscape and easy to access and enjoy the outdoors

Younger couples, affluent professionals

Overnight stays and increasing visitor spend

Access to rural areas of the district

OUR EMERGING APPROACH

Emerging vision for tourism strategy is of a vibrant, high-quality, and inclusive destination, supported by valued collaboration through the Visit Winchester team.

It could include these key elements ...

Vision	Outcome	Priority Themes
Sustainable growth	Keep existing and expand into new visitor markets	1. Visitor market focus
Confident & bold	Grow awareness and strengthen perceptions of Winchester	2. Destination marketing
	Seize key themes: food & drink, access to nature, sustainability	
Improved experience	Inclusive and accessible to all	3. Product development
	A more joined up offer that makes the most of what we have	
Partnerships & collaboration	Welcoming and well managed	4. Destination Management
	Benefiting and inclusive of residents	
	Working together across visitor economy and beyond existing LA boundaries	

WHAT WE MIGHT CONSIDER

PRIORITY 1: POTENTIAL VISITOR MARKET FOCUS

Keep existing and expand to new visitor markets

TYPE	SEGMENT	WHO	OPPORTUNITY
Existing (Retain)	Country Loving Traditionalists	Affluent 55+ Couples & groups From Hants, S East & London Regular UK breaks	• Core visitor market, attract not alienate • Encourage repeats & overnights • Draw in from increased radius Great for out of season travel
Growth (New)	Cultural Foodie Explorers	Couples or friends Aged 25 to 55 Affluent professionals High spenders From London & S East	• Leverage food & drink to raise awareness & appeal • Increase overnights year round • Help drive a more contemporary image
Development (Longer term)	Global Experience Seekers	Couples or friends Under 40 UK & international	• Year-round weekend overnights • Advocacy on social • Support for sustainability
Growth (Limited)	Curious Families	Families with kids Up to age 12 Multigenerational Day trips & short breaks	• Raise profile of rounded family offer to grow awareness & build overnight business • Advocacy on social

WHAT WE MIGHT CONSIDER

PRIORITY 2: DESTINATION MARKETING IDEAS: Changing perceptions and staying longer

Contemporary repositioning

- Refresh narrative of why Winchester.
- Join up city & rural to enrich visitor offer.
- Heritage PLUS.
- Seize key themes: food & drink, access to nature, sustainability.
- Shared narrative across all sectors.

Focused campaigns

- Tailor marketing campaigns to existing and growth visitor markets.
- Campaigns driven by web content e.g. itineraries, articles, guides.
- Use digital to reach new prospects & geographies e.g. Facebook Meta ads, collaboration with influencers.
- Build image library to reflect segments.

WHAT WE MIGHT CONSIDER

PRIORITY 3: PRODUCT DEVELOPMENT APPROACHES

Competitiveness and capacity for growth

Welcome

Orientation and wayfinding

Gateway / arrival perceptions

Routes and itineraries

Joined up offer

Connectivity

Active travel option and information

Joining up city and rural areas

Rural transport promotion

Overnight stays

Wider variety of accommodation options and choices

Accommodation that meets the visitors' expectations

Events and Experiences

Events with impact

Unique experiences

Experiential tourism across the district

WHAT WE MIGHT CONSIDER

PRIORITY 4: DESTINATION MANAGEMENT

Well managed and inclusive

Quality welcome and environment

- Use of greeters
- Ambassadors
- Interactions with businesses and local communities
- Managing the balance of visitors with residents

Data and insights

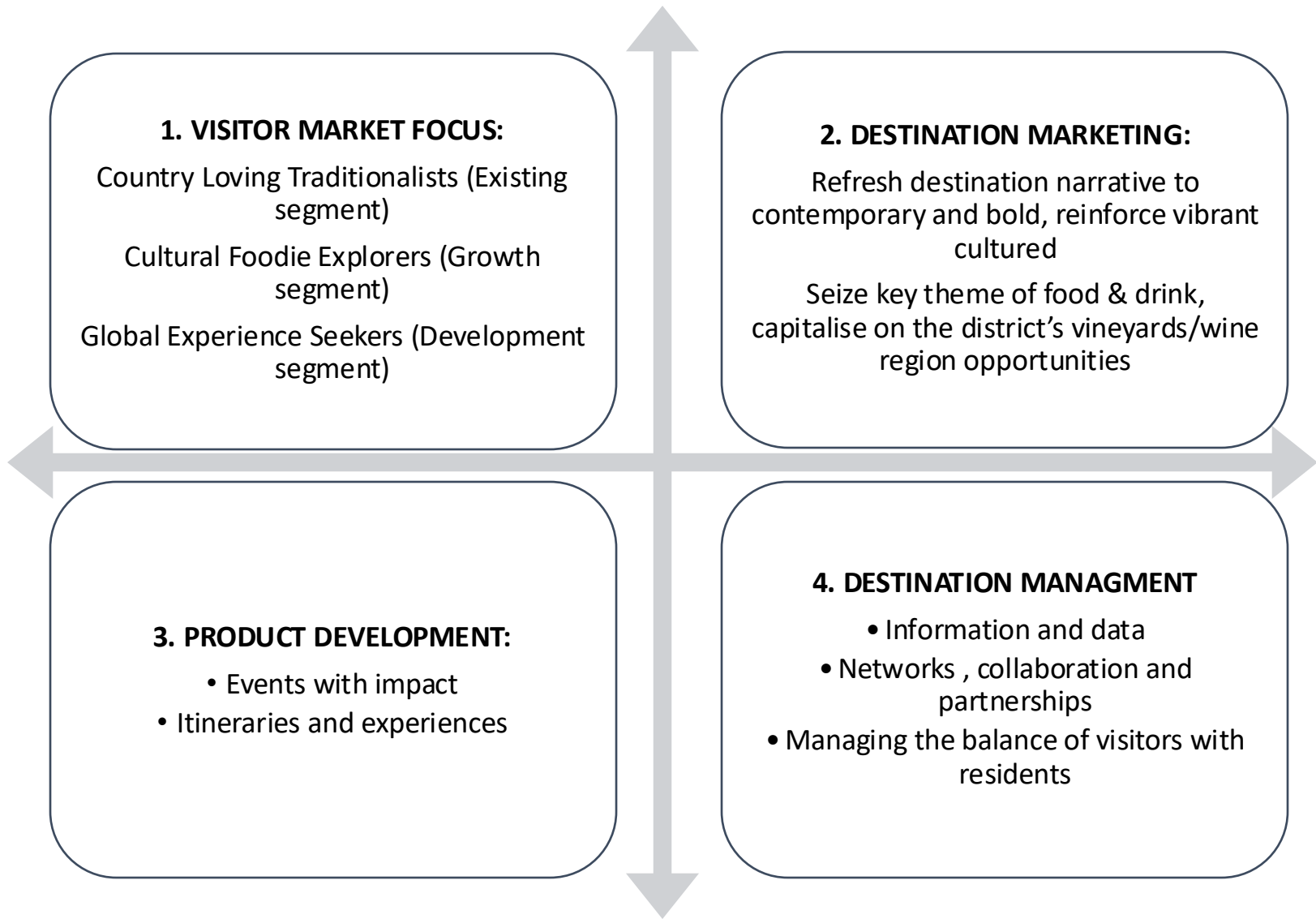
- Sector and visitor market knowledge
- Performance data
- Campaign performance
- Local research

Business support and collaboration

- Centralised advice and support information
- Signposting to training
- Networking

WHAT CAN WE CONCLUDE

Our Emerging Areas Of Focus



WHAT NEXT

Further work by January 2026

- Refine the vision and themes into a clear, compelling framework
- Engage an advisory panel of key stakeholders to test and shape priorities
- Consult the wider business community, building on the earlier approach to ensure broad input
- Draft the final Tourism Strategy for the five-year period 2026-2030, ready for sign-off
- Secure Council adoption, turning vision into action

QUESTIONS



Winchester
City Council