

BLUE SAIL ►

VISITORS PLACES DESTINATIONS

WINCHESTER TOURISM STRATEGY BASELINE REPORT

REPORT FOR WINCHESTER CITY COUNCIL

JULY 2025

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1 SUMMARY FINDINGS

This SWOT summarises the main findings contained within this baseline report. It brings together the different strands of work and represents our analysis.

| STRENGTHS | WEAKNESSES |
|--|---|
| <ul style="list-style-type: none"> ▶ Heritage offer is strong and has real depth and breadth ▶ There is a good food and drink provenance (vineyard, breweries, watercress etc.) ▶ The offer is tradition and the destination is seen as ‘quintessential England’ ▶ Value from staying visitors is significant ▶ Connectivity is good – easy to get to/from by road and rail ▶ Retail and food drink – there is a good range of independents ▶ Some events have impact e.g. Christmas market ▶ Gateway to the South Downs and ease of access to rural offer from the city ▶ VisitWinchester stakeholder meetings seen as a valuable networking opportunity | <ul style="list-style-type: none"> ▶ Not enough staying visitors – low % of overall. Therefore lower overall value of tourism ▶ Not enough quality accommodation within the city and family accommodation across the district. Lack of distinct accommodation e.g. Canopy & Stars ▶ Food offer broad but absence of ‘Michelin’ rated and independent sector overshadowed by chains ▶ Lack of clear events strategy and typology of events (Signature, Growth, Community etc.) and treating all events the same in terms of focus and marketing ▶ Rural transport to connect visitors to Winchester with the towns, villages and attractions by public transport ▶ Heritage experiences not joined up into coherent offer and need for narrative to knit them together ▶ Lack of itineraries that illustrate experiences to target markets ▶ Brand narrative lacking impact and cut-through. Destination seen as ‘nice’ but indistinct and not progressive |

| OPPORTUNITIES | THREATS |
|---|--|
| <ul style="list-style-type: none"> ▶ There is headroom for growth in impact! And achieve a better balance (inc. seasonality) ▶ Join up and make more of the offer and experiences that already exist via itineraries, positioning etc. to grow overnight stays ▶ Build the dynamic, contemporary and fun – as well as ‘traditional’ ▶ Rural public transport and active travel connectivity ▶ Accommodation development and (city/ rural) for specific segments ▶ Events strategy and clarity about how and where events can drive tourism growth and value ▶ Positioning of producers and food/drink provenance as well as related experiences (see, taste, try etc.) and ‘wine capital’ ▶ Make more of landscape – not dramatic but easy to access and enjoy including SDNP and S Downs Way and ‘dark skies’ opportunities ▶ Brand development including how to position the strong heritage offer – Story of England! ▶ Sustainable and responsible, accessible and inclusive opportunities for future development ▶ Location for film and tv production to grow screen tourism potential ▶ Target growth segments (e.g. families) to raise awareness of the destination’s wider offer (i.e. beyond heritage) to increase overnights | <ul style="list-style-type: none"> ▶ Potential dilution of Winchester within the wider LVEP activity ▶ Faster development of experiences among competitors e.g. Sussex wine ▶ Loss of demand to neighbouring areas because insufficient accommodation supply ▶ Failure to develop a distinctive identity and continued lack of clarity about what Winchester stands for among visitors |

2 VISITOR DATA

KEY FINDINGS

- ▶ Winchester District's total visitor-related economic impact reached **£292.2 million**. This includes **£55.1 million** from 220,000 staying visitor trips (736,000 visitor nights) and **£237.1 million** from 7.86 million day visits. The tourism sector supports **5,760 jobs** (4,231 FTE roles), accounting for 7% of all employment in the district.
- ▶ Winchester leads comparison destinations in **day visit volume** (7.86 million), significantly higher than Stratford (5.715 million) and Warwick (3.227 million).
- ▶ However, Winchester lags in **staying visitors** (220,000 trips) and employment contribution compared to Stratford (536,000 trips, 9,179 FTE jobs) and Warwick (386,000 trips, 5,552 FTE jobs). Winchester has the **longest average stay** among the three compared destinations at 3.35 nights per trip.
- ▶ **Overseas business spend** is notably strong, suggesting potential for growth as a business destination.
- ▶ Hotel occupancy has grown over the last 5 years, reaching 76.1% in May 2025, though still below May 2019 levels (79.2%). Average daily rates increased by about 13.5% between 2019-2025. The sector is buoyant, likely supported by strong corporate, business combined with leisure.
- ▶ Winchester consistently attracted a large volume of day visitors (average 4.69 million per year), making it one of the most visited districts in Hampshire for day tourism (3rd highest after Portsmouth and Southampton). However, the **economic return from day visits (£106 million)** placed it 6th among 13 Hampshire districts, suggesting lower-cost activities or shorter durations.
- ▶ For overnight tourism, Winchester averaged 244,000 staying visitor trips per year, generating 672,000 nights and approximately **£36 million in spending** (4th in Hampshire).
- ▶ There's a clear opportunity to **grow the economic value per visit** as visitors are numerous but not necessarily spending at levels comparable to other historic destinations or competitors.
- ▶ Nationally, the South East, including Winchester, has seen fluctuations in tourism, with a decline in domestic overnight and day visitors from 2023-2024, but a recovery in overseas tourism.

WINCHESTER – TOURISM ECONOMIC IMPACT – 2022

Tourism Economic Impact in Winchester District – Key Highlights

In the latest economic impact assessment (2022), **Winchester District** continues to demonstrate the significant role tourism plays in its local economy.

According to the latest assessment:

- ▶ The district welcomed approximately **220,000 staying visitor trips**, resulting in **736,000 visitor nights** and generating **£55.1 million** in staying visitor expenditure.
- ▶ **7.86 million day visits** contributed a significant **£237.1 million**, averaging over **£30 per visitor**.
- ▶ In total, **direct visitor spend reached £288.2 million**, with an additional **£4.1 million** in related expenditure, bringing the **total visitor-related economic impact to £292.2 million**.

Tourism's influence extends beyond direct spending:

- ▶ The sector supports 5,760 jobs, including 4,231 full-time equivalent (FTE) roles.
- ▶ It accounts for 7% of all employment in the district, underscoring its vital role in sustaining the local economy.
- ▶ Additionally, the sector drives further economic benefits through the supply chain, with £78.0 million spent on suppliers and income generation, reflecting the wide-reaching value of the tourism industry in the area.

These figures highlight the strategic importance of tourism for Winchester's economic development and the need for sustained investment in infrastructure, visitor services, and promotional efforts to maintain competitiveness and support local prosperity.

| Winchester District | |
|------------------------|-------------|
| | 2022 |
| Staying visitor trips | 220,000 |
| Staying visitor nights | 736,000 |
| Staying visitor spend | £55,113,000 |

| | |
|-------------------------------------|--------------|
| Day visits | 7,860,000 |
| Day visitor spend | £237,080,000 |
| Direct visitor spend | £292,193,000 |
| Supplier and Income Spend | £78,023,000 |
| Total tourism value | £370,216,000 |
| Estimated actual employment | 5,760 |
| FTE employment | 4,231 |
| Proportion of all Employment | 7% |

COMPARATOR VOLUME & VALUE

When comparing the volume and value of Winchester with similar destinations such as Warwick and Stratford Districts, Winchester leads in day visit volume by a wide margin receiving 7.86 million – higher than both Stratford and Warwick - and Winchester generates the second-highest overall tourism value, driven largely by day visit spend. Stratford and Warwick demonstrate significantly higher levels of staying visitors and employment contribution.

| | Winchester District | Stratford District | Warwick District |
|--|---------------------|--------------------|------------------|
| | 2022 | 2022 | 2022 |
| Staying visitor trips | 220,000 | 536,000 | 386,000 |
| Staying visitor nights | 736,000 | 1,555,000 | 1,236,000 |
| Staying visitor spend | £55,113,000 | £148,129,000 | £107,506,000 |
| Day visits | 7,860,000 | 5,715,000 | 3,227,000 |
| Day visitor spend | £237,080,000 | £233,776,000 | £135,595,000 |
| Direct visitor spend | £292,193,000 | £381,905,000 | £243,101,000 |
| Indirect, Supplier and Income Spend | £78,023,000 | £93,681,000 | £69,980,000 |
| Total tourism value | £370,216,000 | £474,586,365 | £313,081,450 |
| Estimated actual employment | 5,760 | 6,689 | 4,103 |
| FTE employment | 4,231 | 9,179 | 5,552 |
| Proportion of all Employment | 7% | 14% | 7% |

Winchester excels in attracting day visitors and generating substantial direct spend, underscoring its cultural and historical appeal. However, it lags in overnight tourism, limiting its tourism value compared to Stratford, which leverages a robust stay-based economy to generate greater employment and spend.

Staying Visitors – Purpose of Trip

Although Winchester attracts fewer overall visitors than its counterparts, it consistently shows strong performance in visitor engagement. Winchester's average stay is the longest of all three destinations at 3.35 nights per trip, compared to 2.90 in Stratford and 3.20 in Warwick. Winchester sees a healthy mix of holiday, business, and VFR (visiting friends & relatives) travel and particularly notable is the strong overseas business spend which suggests potential to grow Winchester's profile as a small but effective business destination, with additional premium accommodation, executive venues and business/leisure offerings. Although small, educational tourism has the opportunity to increase with short courses and by partnering with nearby institutions and international schools.

| Trips By Purpose | | | | | | | | | |
|------------------|----------------|-----------|---------|---------------|-----------|---------|----------------|-----------|---------|
| | UK | | | Overseas | | | Total | | |
| | Winchester | Stratford | Warwick | Winchester | Stratford | Warwick | Winchester | Stratford | Warwick |
| Holiday | 100,000 | 299,000 | 134,000 | 16,000 | 81,000 | 59,000 | 116,000 | 380,000 | 193,000 |
| Business | 34,000 | 28,000 | 47,000 | 16,000 | 4,000 | 7,000 | 50,000 | 32,000 | 54,000 |
| VFR | 27,000 | 87,000 | 97,000 | 13,000 | 17,000 | 19,000 | 40,000 | 104,000 | 116,000 |
| Other | 11,000 | 19,000 | 29,000 | 1,000 | 1,000 | 2,000 | 12,000 | 20,000 | 22,000 |
| Study | 0 | 0 | 0 | 1,000 | 1,000 | 2,000 | 1,000 | 1,000 | 2,000 |
| Total | 173,000 | 432,000 | 298,000 | 47,000 | 104,000 | 88,000 | 220,000 | 536,000 | 386,000 |

| Nights by Purpose | | | | | | | | | |
|-------------------|------------|-----------|---------|------------|-----------|---------|------------|-----------|-----------|
| | UK | | | Overseas | | | Total | | |
| | Winchester | Stratford | Warwick | Winchester | Stratford | Warwick | Winchester | Stratford | Warwick |
| Holiday | 266,000 | 709,000 | 338,000 | 77,000 | 359,000 | 225,000 | 343,000 | 1,068,000 | 593,000 |
| Business | 91,000 | 49,000 | 89,000 | 66,000 | 32,000 | 53,000 | 157,000 | 81,000 | 142,000 |
| VFR | 72,000 | 199,000 | 234,000 | 106,000 | 161,000 | 173,000 | 178,000 | 360,000 | 407,000 |
| Other | 33,000 | 14,000 | 17,000 | 10,000 | 9,000 | 10,000 | 43,000 | 23,000 | 27,000 |
| Study | 0 | 0 | 0 | 15,000 | 23,000 | 68,000 | 15,000 | 23,000 | 68,000 |
| Total | 461,000 | 971,000 | 678,000 | 275,000 | 584,000 | 558,000 | 736,000 | 1,555,000 | 1,236,000 |

| Spend by Purpose | | | | | | | | | |
|------------------|--------------------|---------------------|--------------------|--------------------|--------------------|--------------------|--------------------|---------------------|---------------------|
| UK | | | | Overseas | | | Total | | |
| | Winchester | Stratford | Warwick | Winchester | Stratford | Warwick | Winchester | Stratford | Warwick |
| Holiday | £17,149,000 | £78,147,000 | £35,611,000 | £7,086,000 | £36,703,000 | £25,915,000 | £24,235,000 | £114,850,000 | £61,526,000 |
| Business | £8,194,000 | £8,618,000 | £14,943,000 | £11,227,000 | £6,673,000 | £4,366,000 | £19,421,000 | £11,281,000 | £19,309,000 |
| VFR | £3,594,000 | £11,275,000 | £12,696,000 | £5,425,000 | £6,277,000 | £6,681,000 | £9,019,000 | £17,552,000 | £19,377,000 |
| Other | £634,000 | £1,962,000 | £2,210,000 | £508,000 | £1,145,000 | £1,219,000 | £1,142,000 | £3,107,000 | £3,429,000 |
| Study | £0 | £0 | £0 | £1,296,000 | £1,338,000 | £3,866,000 | £1,296,000 | £1,338,000 | £3,866,000 |
| Total | £29,571,000 | £100,003,000 | £65,460,000 | £25,542,000 | £48,126,000 | £42,046,000 | £55,113,000 | £148,129,000 | £107,506,000 |

Source: Winchester EIA - Tourism South East Cambridge Model 2022; Stratford and Warwick District EIA's – The Research Solution Cambridge Model 2022

HOTEL PERFORMANCE

As part of this work we have reviewed hotel performance data for Winchester district. Key findings from this analysis are:

- ▶ Occupancy has grown over each of the last 5 years (using May as a benchmark month) and in May 25 average occupancy of 76.1% was achieved. This is still below May 2019 performance (79.2%) in common with most other destinations
- ▶ Increases in average daily rate of about 13.5% between 2019-2025 is similar to other destinations.
- ▶ Looking at monthly performance over the last 12 months (Jun 24-May 25) shows over 6 months with over 80% occupancy (May-Oct) and only one month (Jan) below 60%.
- ▶ Revenue per available room peaks at around £88 (Jul) but drops as low as £36 (Jan).

This illustrates a buoyant hotel sector, likely supported by a strong corporate and business base alongside strong leisure business.

HAMPSHIRE AND LOCAL AUTHORITIES DAY AND OVERNIGHT TRIPS (2017-2019)

Winchester's Position

Winchester District consistently attracted a large volume of visitors during the period 2017-2019 ¹

On average, 4.69 million day visitors explored the city and its surrounding area each year, making Winchester one of the most visited districts in Hampshire for short, non-overnight tourism. Only two districts—Portsmouth and Southampton—surpassed it in terms of raw day visit numbers.

Despite its popularity, the economic return from these visits did not fully reflect the volume. While Winchester welcomed nearly 5 million day visitors, the average day visitor spend stood at £106 million, placing it 6th among the 13 Hampshire districts. This suggests that while many people visit Winchester, they are likely engaging in lower-cost activities or shorter-duration experiences, such as sightseeing, shopping, or attending free public events.

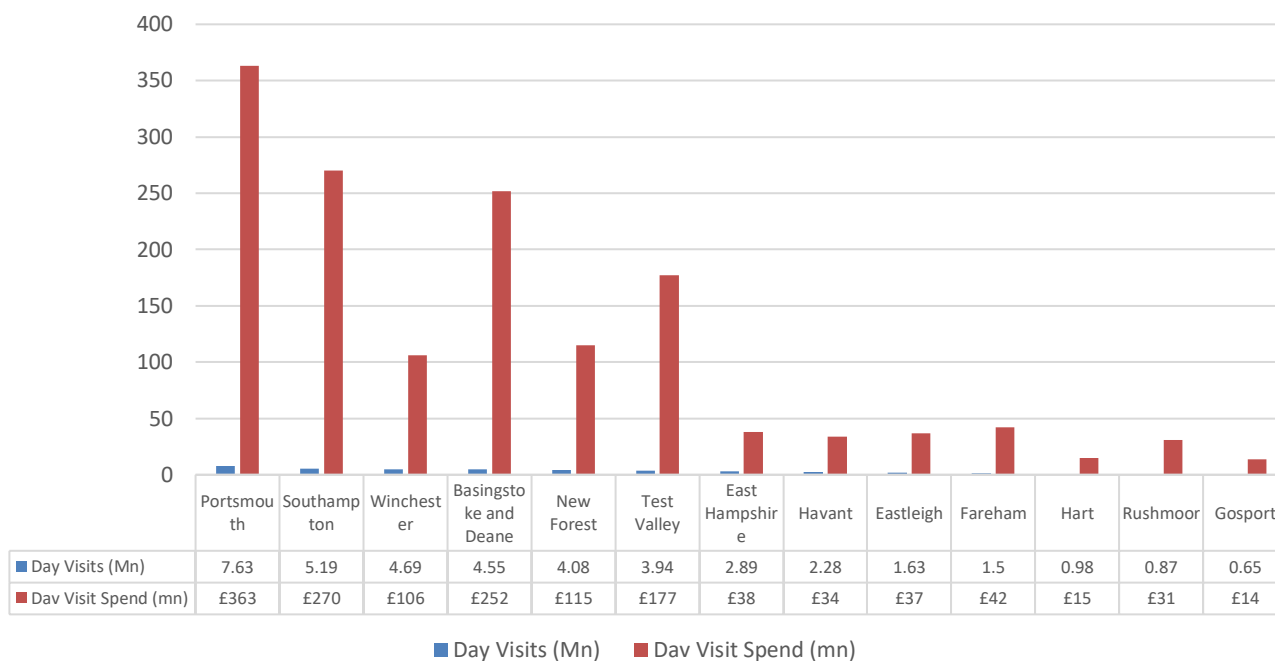
On the overnight tourism front, Winchester also performed steadily. The district averaged 244,000 staying visitor trips per year over the three-year period, with these guests generating 672,000 nights staying annually. This equates to roughly 2.75 nights per visitor, which is in line with short-break or weekend trip patterns common in heritage cities. In terms of financial impact, these visitors spent approximately £36 million per year, placing Winchester 4th in Hampshire across overnight tourism measures.

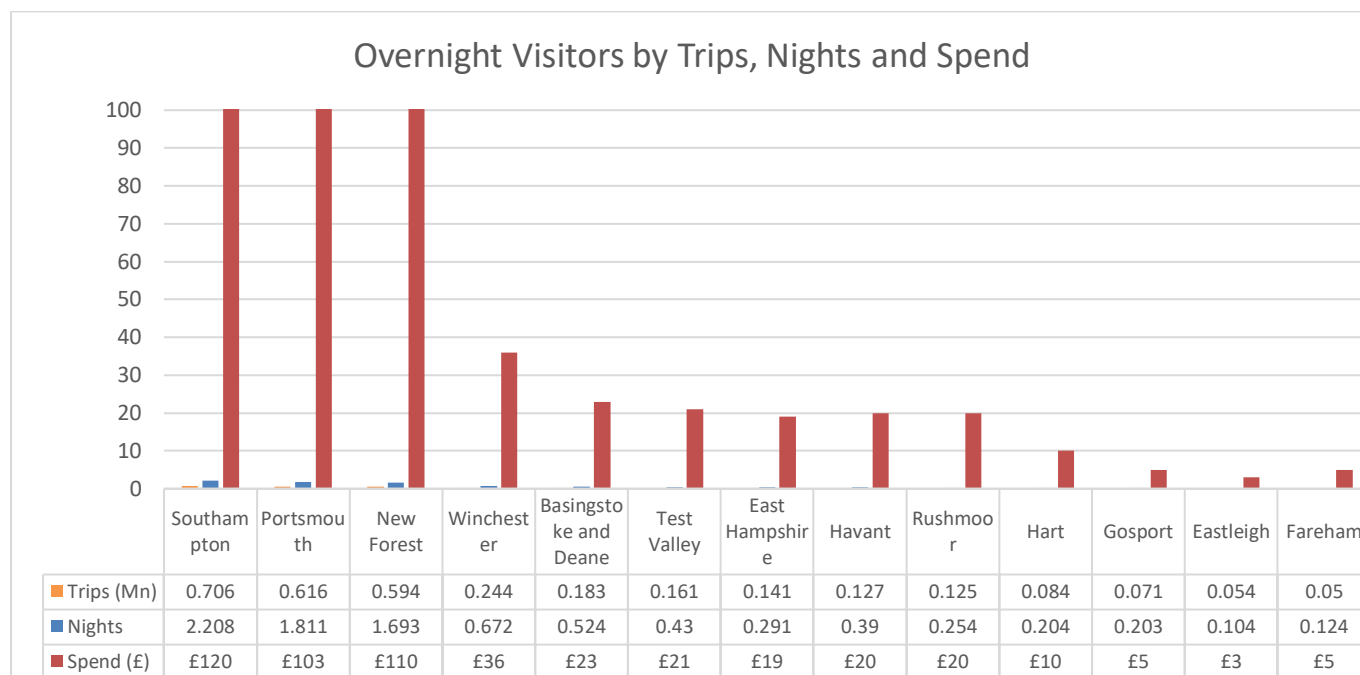
Winchester's overall tourism economy benefits from a balance of high visitor volume and consistent overnight tourism, but there remains a clear opportunity to grow the economic value of each visit. Visitors are coming in large numbers but not necessarily spending at levels comparable to other historic destinations or nearby competitors such as Portsmouth or New Forest.

¹ Local authority data from the national surveys has not been published after this period

| | Day Visits (mn) | % | Day Visit Spend (mn) | % | Overnight Trips (mn) | Nights (mn) | Spending (£) (mn) |
|-----------------------|-----------------------|-----------|----------------------------|----------|----------------------------|----------------|-------------------------|
| Hampshire | 40.9 | | £1,494 | | 3.153 | 8.944 | £497 |
| Portsmouth | 7.63 | 19 | £363 | 24 | 0.616 | 1.693 | £103 |
| Southampton | 5.19 | 13 | £270 | 18 | 0.706 | 2.208 | £120 |
| Winchester | 4.69 | 11 | £106 | 7 | 0.244 | 0.672 | £36 |
| Basingstoke and Deane | 4.55 | 11 | £252 | 17 | 0.183 | 0.524 | £23 |
| New Forest | 4.08 | 10 | £115 | 8 | 0.594 | 1.811 | £110 |
| Test Valley | 3.94 | 10 | £177 | 12 | 0.161 | 0.430 | £21 |
| East Hampshire | 2.89 | 7 | £38 | 3 | 0.141 | 0.291 | £19 |
| Havant | 2.28 | 6 | £34 | 2 | 0.127 | 0.390 | £20 |
| Eastleigh | 1.63 | 4 | £37 | 2 | 0.054 | 0.104 | £3 |
| Fareham | 1.50 | 4 | £42 | 3 | 0.050 | 0.124 | £5 |
| Hart | 0.98 | 2 | £15 | 1 | 0.084 | 0.204 | £10 |
| Rushmoor | 0.87 | 2 | £31 | 2 | 0.125 | 0.254 | £20 |
| Gosport | 0.65 | 2 | £14 | 1 | 0.071 | 0.203 | £5 |

Source: GBTS 2017-2019

Day Visitor Trips and Spend by Local Authority Area (2017-2019)



Source: GBTS 2017-2019

DAY VISITS IN THE REGIONAL CONTEXT – TRIPS & SPEND

Trips, Nights and Spend

Data for the following section is taken from the national tourism surveys and is not available at the local level for Winchester. Therefore, to provide context, it is useful to look at Hampshire compared to other counties within the South East.

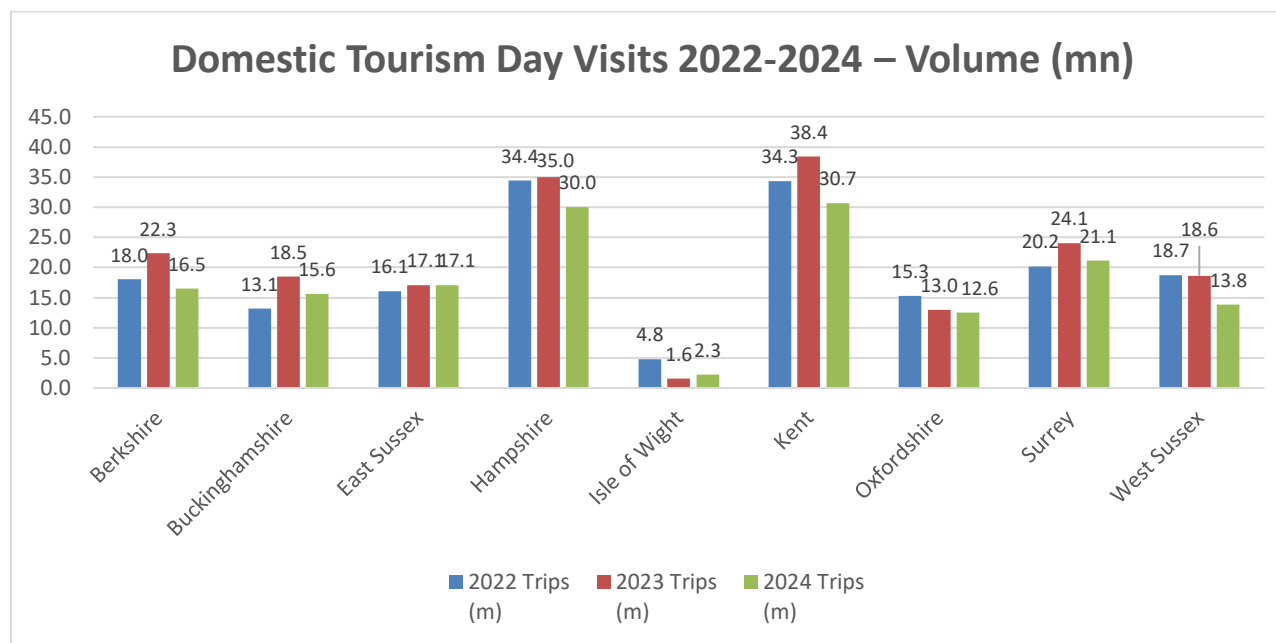
Hampshire demonstrated strong and consistent performance in domestic tourism day visit value between 2022 and 2024. Positioned among the leading counties in South East England, Hampshire's visitor economy rebounded swiftly post-pandemic, reaching a peak in 2023 before stabilising slightly in 2024.

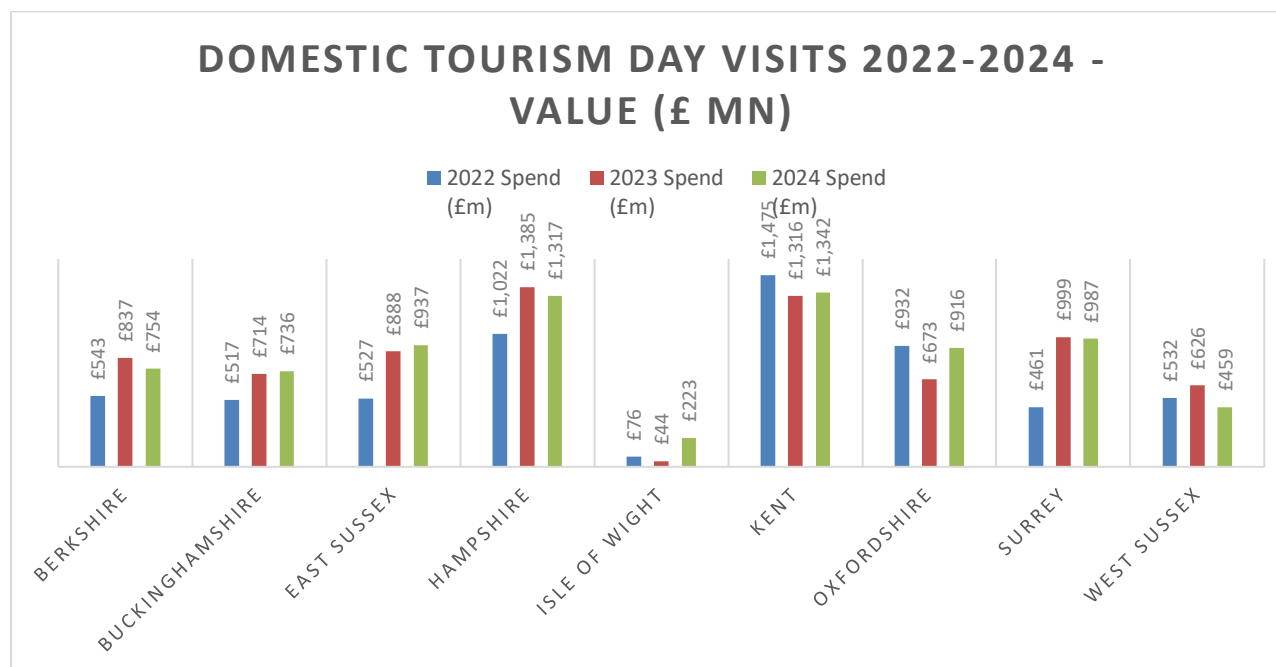
This trend reflects broader regional patterns while underscoring Hampshire's attractiveness and resilience as a visitor destination.

- ▶ Hampshire began 2022 with a solid base of **£1.022 billion** in day visitor spend.
- ▶ This performance already positioned it as one of the top destinations in the region.
- ▶ It reflected early signs of recovery following pandemic-related disruptions, aided by strong transport links and a diverse tourism offer (heritage, coast, countryside, and cities).
- ▶ In 2023, Hampshire saw a remarkable 35% increase in day visitor spend, reaching £1.385 billion.
- ▶ This was the highest annual spend for the county in the three-year period, reflecting a strong post-pandemic resurgence.
- ▶ In 2024, spend declined slightly to £1.317 billion, a modest 5% decrease from 2023.
- ▶ While no longer at peak, the figure remains significantly above 2022 levels, suggesting the gains made during the recovery were largely retained.

The slight drop likely reflects economic pressures such as inflation and cost-of-living constraints affecting discretionary travel.

| | Day Visits (mn) | | | Day Visit Spend (mn) | | |
|------------------|--------------------|-------------|-------------|-------------------------|---------------|---------------|
| | 2022 | 2023 | 2024 | 2022 | 2023 | 2024 |
| Berkshire | 18.0 | 22.3 | 16.5 | £543 | £837 | £754 |
| Buckinghamshire | 13.1 | 18.5 | 15.6 | £517 | £714 | £736 |
| East Sussex | 16.1 | 17.1 | 17.1 | £527 | £888 | £937 |
| Hampshire | 34.4 | 35.0 | 30.0 | £1,022 | £1,385 | £1,317 |
| Isle of Wight | 4.8 | 1.6 | 2.3 | £76 | £44 | £223 |
| Kent | 34.3 | 38.4 | 30.7 | £1,475 | £1,316 | £1,342 |
| Oxfordshire | 15.3 | 13.0 | 12.6 | £932 | £673 | £916 |
| Surrey | 20.2 | 24.1 | 21.1 | £461 | £999 | £987 |
| West Sussex | 18.7 | 18.6 | 13.8 | £532 | £626 | £459 |





Source: VisitEngland – GBTS 2024, IPS 2023

DOMESTIC OVERNIGHT VISITS IN THE REGIONAL CONTEXT

From 2022 to 2024, domestic overnight tourism across the South East region of England displayed notable fluctuations in trip volume, visitor spending, and overnight stays (bednights). Hampshire consistently ranked among the top-performing counties across all metrics. Despite a modest decline in total visits and bednights by 2024, Hampshire maintained its lead in cumulative visitor spend, underlining its continued economic importance as a tourism destination.

| County of trip destination | 2022 Trips (m) | 2023 Trips (m) | 2024 Trips (m) | 2022 Spend (£m) | 2023 Spend (£m) | 2024 Spend (£m) | 2022 Bednights (m) | 2023 Bednights (m) | 2024 Bednights (m) |
|----------------------------|----------------|----------------|----------------|-----------------|-----------------|-----------------|--------------------|--------------------|--------------------|
| Berkshire | 1.3 | 1.5 | 1.2 | £217 | £266 | £259 | 2.5 | 3.0 | 2.8 |
| Buckinghamshire | 1.4 | 1.2 | 1.0 | £243 | £157 | £172 | 3.0 | 3.1 | 1.9 |
| East Sussex | 2.2 | 2.1 | 2.4 | £487 | £470 | £524 | 6.9 | 4.8 | 5.3 |
| Hampshire | 3.6 | 2.8 | 2.6 | £696 | £590 | £629 | 8.8 | 7.3 | 6.2 |
| Isle of Wight | 0.6 | 0.4 | 0.4 | £224 | £148 | £130 | 2.5 | 1.7 | 1.7 |
| Kent | 3.0 | 3.3 | 3.0 | £447 | £669 | £559 | 7.4 | 7.6 | 7.6 |
| Oxfordshire | 1.7 | 1.7 | 1.4 | £415 | £371 | £433 | 4.1 | 3.9 | 2.7 |
| Surrey | 1.7 | 1.7 | 1.4 | £381 | £368 | £381 | 4.2 | 3.6 | 3.1 |
| West Sussex | 1.8 | 2.1 | 1.3 | £383 | £495 | £277 | 5.2 | 6.1 | 3.2 |

Source: VisitEngland – GBTS 2024, IPS 2023

Across the three years, Hampshire has consistently been one of the top-performing counties in the South East. In 2022, it welcomed more overnight visitors than any other county in the region—a testament to its broad appeal, rich cultural assets, and variety of urban and rural destinations. Winchester’s historic charm, the maritime heritage of Portsmouth, and the natural beauty of the New Forest have all played a part in attracting overnight guests.

Although the volume of trips declined slightly in 2023 and 2024, Hampshire remained a central pillar of the South East’s tourism economy. Importantly, it retained the **highest overall visitor spend in the region**, suggesting that while fewer people may have visited, those who did contributed significantly to the local economy.

Between 2022 and 2024, Hampshire experienced a notable decline in the number of bednights. This indicates that visitors may be opting for shorter stays—possibly due to, economic constraints, or a growing preference for frequent but brief leisure trips. This trend mirrors national shifts, where the traditional week-long break is giving way to long weekends and shorter getaways.

Despite this reduction in duration, Hampshire’s visitor spending remained resilient, hinting at a visitor base that is either wealthier or more willing to spend on premium experiences, dining, and cultural attractions. The implication is clear: Hampshire is not just a destination of choice—it is a destination of value.

When viewed alongside counties such as Kent, East Sussex, and Oxfordshire, Hampshire’s performance is particularly impressive. It leads in total visitor spend across the three years and ranks among the top in trip volumes and economic impact. Kent and East Sussex have been strong competitors, especially in 2023 and 2024, but Hampshire’s consistent results highlight its enduring appeal.

The diversity of offer—from coastlines to countryside, historic cities to vibrant events—gives Hampshire a competitive advantage. The county’s ability to attract both weekenders and holidaymakers positions it well for sustained recovery and growth.

HAMPSHIRE – OVERSEAS OVERNIGHT VISITS IN THE REGIONAL CONTEXT

Trips, Nights, Spend

Hampshire recorded a strong performance in overseas overnight tourism in 2022, welcoming **510,000 international visitors**, placing it **4th in the South East region** for total overseas visits. The county generated **4.76 million overnight stays**—the **third highest in the region**—and attracted **£326 million in visitor spend**,

Hampshire hosted **14%** of the South East’s international visits.

It accounted for **15%** of the region's total overseas visitor nights and spend.

High nights-per-visitor suggests **longer stays** than in some peer counties, translating into greater economic benefit per trip.

| UK Region/Sub-region | 2022 | 2022 | 2022 |
|----------------------|--------------|---------------|------------------|
| | Visits (000) | Nights (000) | Spend (£million) |
| Berkshire | 478 | 4,291 | £370 |
| Buckinghamshire | 251 | 2,672 | £160 |
| East Sussex | 511 | 4,022 | £287 |
| Hampshire | 510 | 4,759 | £326 |
| Isle of Wight | 50 | 434 | £33 |
| Kent | 659 | 5,465 | £325 |
| Oxfordshire | 580 | 4,413 | £418 |
| Surrey | 449 | 3,758 | £221 |
| West Sussex | 344 | 2,340 | £151 |
| SOUTH EAST | 3,641 | 32,155 | 2,289 |

Source: ONS – IPS 2022

Hampshire ranks highly among South East counties for overseas overnight tourism, with the third highest number of visits, second highest number of nights, and third highest visitor spend. This reflects a strong international tourism offer, supported by destinations such as Winchester, the New Forest, and the cruise hub of Southampton. However, it still trails Oxfordshire and Kent in overall economic impact from overseas tourists.

NATIONAL DATA

In 2024, the South East accounted for 16% of England's domestic overnight trips, a strong share of the overall England trips. Visitors to the region spent an average of 2.4 nights per trip, slightly below the national average of 2.85 nights. Average spend per trip in the South East was approximately £235, compared to £305 for England as a whole.

In 2023, overseas overnight trips to the South East accounted for 13% of staying visitors in England, with a 14% of nights, but only 9% share of spend when compared with England. Overnight overseas visitors stayed on average 7.86 nights compared to 7.45 nationally.

In 2024, day visitors to the South East spent an average of £47.20 per trip, compared to the national average of £53.40.

| Trips by domestic overnight visitors | | | | |
|--------------------------------------|------------|-----------|------------|------------|
| | South East | | England | |
| | 2023 | 2024 | 2023 | 2024 |
| Trips | 16.3 | 14.3 | 99.4m | 89.6 |
| Nights | 41.2 | 34.5 | 280.3 | 255.7 |
| Spend | £3,534bn | £3,363 bn | £26.045bn | £27.3bn |
| Trips by overseas overnight visitors | | | | |
| | South East | | England | |
| | 2022 | 2023 | 2022 | 2023 |
| Trips | 3.6m | 4.3m | 27,747 | 33,488,mn |
| Nights | 32,190 | 33,824 | 227,307 | 249,641 |
| Spend | £2.286bn | £2,477 bn | £22,593 bn | £26,590 bn |

| Trips by day visitors | | | | |
|-----------------------|------------|----------|---------|---------|
| | South East | | England | |
| | 2023 | 2024 | 2023 | 2024 |
| Trips | 186.3m | 146.9bn | 1,030bn | 906.3bn |
| Spend | £7,402bn | £6,933bn | £45.6bn | £48,4bn |

Source: VisitEngland – GBTS 2024, IPS 2023

Between 2023 and 2024, the South East experienced a noticeable decline in domestic overnight tourism. Trips fell from 16.3 million to 14.3 million, and overnight stays dropped from 41.2 million to 34.5 million. Visitor spending also saw a modest decline, from £3.534 billion to £3.363 billion.

Nationally, a similar drop in trip numbers was observed (from 99.4 million to 89.6 million). However, overall spend increased slightly—from £26.045 billion to £27.3 billion—suggesting that average spend per trip rose in other regions.

The South East saw a recovery in overseas tourism from 2022 to 2023. International trips rose from 3.6 million to 4.3 million, with visitor spend increasing from £2.286 billion to £2.477 billion. Overnight stays also increased slightly.

England as a whole experienced robust growth in this sector, with trips rising from 27.7 million to 33.5 million and spending jumping from £22.593 billion to £26.590 billion.

The South East experienced a significant decline in day visitor numbers between 2023 and 2024—from 186.3 million to 146.9 million. Corresponding spending also fell from £7.402 billion to £6.933 billion.

3 MARKETING & COMMUNICATIONS REVIEW

KEY FINDINGS

- ▶ Winchester's proximity to London and its positioning as a city rich in history with a Jane Austen connection are all well understood.
- ▶ The retail offer tends to be viewed positively, combining independent retailers and brand names. The Christmas Market is a key retail event with an excellent reputation as one of the best in the country.
- ▶ The food & drink offer is acknowledged but there is scope to develop this messaging further. For example, there is an opportunity to promote the district's reputation for wine and associated visitor experiences.
- ▶ There is a nod to the cultural/festivals scene but potential to add to the sense of 'vibrant and cultured' which feature in the strapline by raising awareness of the city's creative side.
- ▶ The South Downs National Park location is frequently mentioned but the landscape within the city's footprint, far less so e.g. water meadows, weirs, St Catherine's Hill. This may present a route for differentiating the experience of the city, whilst also acting as an entry point for better promoting the outdoor offer with the city break context.
- ▶ Overall there is a risk of appearing '[really lovely](#)' but without anything particularly compelling to motivate a visit now i.e. the sense that it will always be there, nothing new happening, no sense of edge or experiences to bring in younger visitors.
- ▶ Opportunity to use food & drink, art/festivals scene and enhanced promotion of outdoor offer to create more reasons to visit.

VISIT WINCHESTER

- ▶ Messaging is centred around the strapline ‘Vibrant. Ancient. Cultured’.
- ▶ The introductory copy covers off many bases but does not convey the city’s riverside situation nor the food & drink offer, such as vineyards and farmers’ markets. The contemporary arts scene and examples of outdoor activities would be valuable additions.

“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.”

- ▶ Lots of great content across the site, but the topical blog articles would benefit from being surfaced with more prominence.



VISIT HAMPSHIRE

- ▶ Things to do page highlights Winchester's heritage offer and Jane Austen connections. The military museums, Marwell Zoo and Winchester Science Centre are clearly associated with Winchester and The Watercress Line with Alresford. The city and Alresford are mentioned regarding shopping. Walking and cycling are flagged up and link out to further content.
- ▶ Winchester page replicates Visit Winchester's positioning as an historic, unspoilt city surrounded by fresh countryside. Locates it on the edge of South Downs National Park with riverside walks and water meadows. Promotes the city as 'home of good food', with eateries and farmer's markets, but omits vineyards and distillery. Key events highlighted e.g. Christmas market and the 'thriving arts scene'. Good sense of heritage and attractions.
- ▶ What's On promotes Alresford Watercress Festival, with Winchester Cathedral Christmas Market and farmers' markets also featured. The Hat Fair and Boomtown are also spotlighted. Regarding 'Theatres, concerts, performance and comedy', the Theatre Royal is mentioned.
- ▶ Hiking and Walking describes the landscape but makes no reference to rivers/water meadows. South Downs Walks positions Winchester at the start of South Downs Way and spotlights Meon Valley Trail and Jane Austen Walk. Long Distance Walks mentions the city regarding The Clarendon Way and South Downs Way. Also promotes The Wayfarer's Walk. Guided walks are briefly mentioned (link to city page), Literary Walks flags up Keat's Walk and City Walks promotes Winchester Tour Guides. There's a link to family-friendly walks, none are local. Pilgrimage Routes features St Swithuns Way and The Hampshire Millennium Pilgrims' Trail, with the Cathedral mentioned. Festive & Boxing Day walks mentions Old Winchester Hill.
- ▶ Cycling and Mountain Biking highlights Winchester as the start of the South Downs Park National Trail and its inclusion in Lonely Planet's top 1000 adventures. Links out to more detailed information which e.g. hilly circular route to Alresford, King Alfred's Way.
- ▶ Food and Drink clearly positions the county as a place with fine food, local produce and foodie events. Winchester is pitched as a 'medieval, eclectic city', 'fast becoming the foodie capital of the south of England'. A vineyard tour and Bombay Sapphire Experience are recommended but in a Hampshire context, not specific to Winchester. Basic info on Farmer's Markets and Foodie Events, although Alresford Watercress Festival is highlighted– the linked page has minimal info, also needs to feature Fizz Festival etc.
- ▶ Vineyards provides an overview of vineyards, wine events and tours. Winchester only mentioned in relation to The Grange. Focus is on 'East Hampshire & South Downs National Park' and 'Test Valley'.



TOURISM SOUTH EAST: VISITSOUTHEASTENGLAND

- ▶ Promotion to visitors is centred on visitsoutheastengland.com
- ▶ The landing page for [Hampshire](https://visitsoutheastengland.com/hampshire) gives an impression of the county's landscape – clear chalk streams, thatched cottages and cosy pubs, historic buildings, fascinating museums, bustling market towns and three cities. Winchester is namechecked as the start of the South Downs National Park with rolling green pastures, ancient woodlands and river valleys. It mentions the city's heritage as 'once the ancient capital city', along with the Cathedral and links to Jane Austen and King Alfred the Great. Also a note on its cobbled streets and small size.
- ▶ The page has a 'Top 10 things to do' in Hampshire which features several Winchester attractions – Marwell Zoo, Winchester Cathedral, Bombay Sapphire Gin Distillery.
- ▶ There is no mention of vineyards, water meadows or retail in overall description. Other mentions include an article on [churches & cathedrals](#), which features Winchester. 'Things to Do' has a link to Vineyards, Quob Park is the only Winchester business featured.



VISITENGLAND

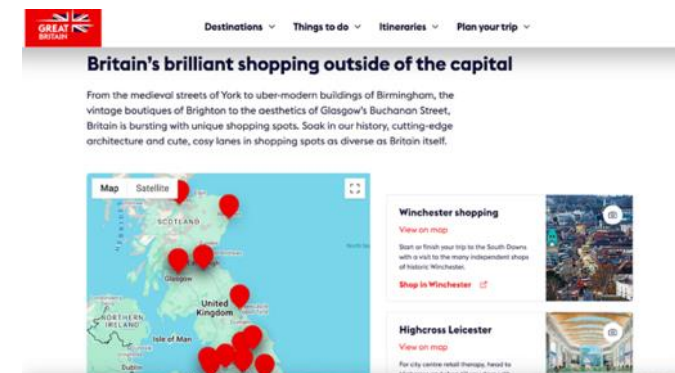
Winchester is featured in two articles:

- ▶ The [three-day Hampshire itinerary](#) highlights the city's heritage (Great Hall, Cathedral), food & drink – fine dining at Chesil Rectory, distillery experience, plus Jane Austen links.
- ▶ [Places to visit in the South Downs National Park](#) spotlights the Cathedral and Jane Austen's grave, and Winchester's position as the official end of the South Downs Way. The additional suggestion to extend your stay with a Sussex wine tour needs updating to a local option.



VISITBRITAIN

- ▶ The site contains six mentions of Winchester.
- ▶ Winchester is highlighted as a [period drama filming location](#) (The Crown) and an [iconic shopping destination](#) and also as home to 'one of Europe's best Christmas markets'.
- ▶ Regarding food & drink, Grape & Grain tours feature in a round-up of [Britain's best breweries & vineyards](#) with a mention of individual vineyards, however none of these are spotlighted in the main feature. Meanwhile The Shoe in Exon is referenced in a piece on [The British Pub](#).
- ▶ For active visitors, [See the Best of Britain in its National Parks](#) makes brief mention of Winchester and that you can walk, cycle or ride the South Downs Way. Spotlights Hambledon as the home to one of the world's oldest cricket grounds.



KEY LOCAL BUSINESSES

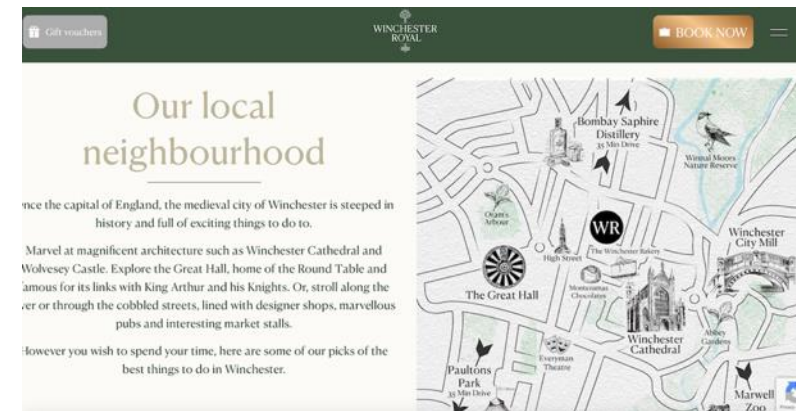
Hotel Du Vin

- ▶ Moments away from the awe-inspiring Winchester Cathedral and the city's vibrant shops, eateries, and attractions.
- ▶ An ancient city steeped in history/ Surrounded by fabulous rolling countryside and pretty Hampshire villages.
- ▶ Set amidst a backdrop of breathtaking architecture, historic museums, and cobbled streets dotted with unique shops and boutiques, Winchester promises a myriad of experiences. Whether you're seeking theatre performances, literary events, or arts festivals, you'll find it on your doorstep.



Winchester Royal Hotel

- ▶ Information about the city is found on the [Surrounds page](#)
- ▶ Once the capital of England, the medieval city of Winchester is steeped in history and full of exciting things to do to.
- ▶ Marvel at magnificent architecture such as Winchester Cathedral and Wolvesey Castle. Explore the Great Hall, home of the Round Table and famous for its links with King Arthur and his knights. Or, stroll along the river or through the cobbled streets, lined with designer shops, marvelous pubs and interesting market stalls.



Wallops Wood

- ▶ Local info is accessed via [things to do page](#)
- ▶ Locates itself as within the Meon Valley, Hampshire but many mentions of Winchester.
- ▶ Winchester, England's former capital and seat of Alfred the Great, which has something for everyone. From great shopping, award-winning restaurants, regular antiques markets, farmers markets, to the cathedral, museums as well as a vibrant programme of events.
- ▶ The annual Hat Fair in July, which has absolutely nothing to do with hats, is a fantastic family friendly free festival of street performances taking place throughout the city. Widely recognised as one of the best in Europe, don't miss Winchester's Christmas Market.
- ▶ Alresford - We recommend visiting this delightful Georgian town which is an excellent place to browse the shops. Walk beside the River Arle and see the eel house and watercress beds, after which the Watercress railway was named. Also, there are regular farmers markets as well as the annual Watercress Festival in May. [Alresford](#) regularly features in lists of the best rural towns to live in and visit.
- ▶ Wickham - Discover the independent shops, restaurants and tearooms occupying the medieval and Georgian properties that line the second largest medieval square in England.



The Grange

- ▶ Discover Hampshire section of site
- ▶ Taste your way through our bountiful county with a trip to our local market town, Alresford...you'll discover a wide selection of shops, including a well-stocked delicatessen featuring a fine selection of cheeses, cold cuts and other gourmet delights. Additionally, two butchers, a fishmonger, a greengrocer, as well as a high-end fashion boutique with famous sales and many retail stores to gratify any discerning shopper.
- ▶ The medieval city of Winchester offers visitors a bustling high street with a range of independent stores to potter, roam and while away an afternoon. Moreover, take the opportunity to immerse yourself in the largest farmer's market in the UK – an established foodie destination.
- ▶ Local attractions, cultural entertainment, eateries and shops highlighted too, as above.



ENTERTAINMENT

Thruxton Karting – One of the very best outdoor circuits in the country

Paulton's Park, Home of Peppa Pig – A family theme park located in the New Forest National Park with over 70 rides and attractions.

Marwell Zoo – with plenty of outdoor space, a whole host of animals and activities to enjoy, Marwell is a great family day out in Hampshire.

Watercress Line – Hampshire's only preserved steam railway

Winchester Science Centre & Planetarium – Hands-on interactive science and technology centre

Experience Hampshire offer a range of experiences from businesses and individuals in Hampshire whose offerings aren't traditionally found on the mainstream tourist sites. For a plethora of unusual and interesting activities rooted in Hampshire have a look on their website.

Pulpo Negro

- ▶ Pulpo Negro is situated in a handsome Georgian town of colour-washed houses, riverside walks, specialist shops and the UK's capital of watercress farming. A true vision of pastel perfection.

Chesil Rectory

- ▶ The city of Winchester has played an important part throughout history. During Saxon times, King Alfred, who was crowned here in 871, made Winchester a royal city: it became the centre of Wessex, the capital of England and subsequently remained a royal residence for many centuries.

MEDIA PERCEPTIONS

These are the key themes under which Winchester appears in the media.

Fantastic Christmas Market

Great coverage and cited as a premier experience across a range of titles. Local attractions, cultural entertainment, places to eat and shops are often highlighted too.

The Times – [18 of the best Christmas markets in the UK](#) N.B. Foodie angle

Metro – [The 8 best Christmas markets to visit in the UK revealed](#)

The Express - [The magical UK Christmas market that truly feels like a German village](#)

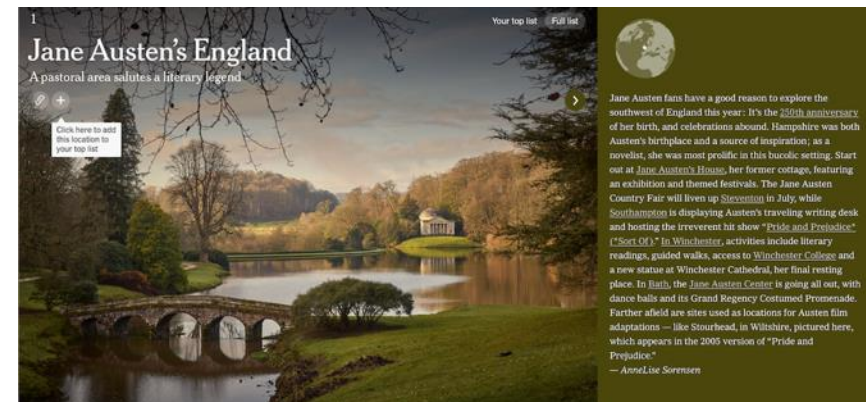


Valuable Jane Austen connection

Winchester has successfully leveraged the anniversary to secure extensive press coverage, with Jane Austen's England even cited as a top 2025 destination in [New York Times](#)

e.g. Lonely Planet – [6 days in Jane Austen's England](#) - targeting Americans, good sense of history, traditional architecture and good food.

...The Wykeham Arms, an eclectic and homey pub in Winchester, and walked along the river to enjoy a delicious dinner – and a ghost story or two – at the Chesil Rectory, housed in a 600-year-old medieval house....a walking tour of Winchester that included the home where Austen died and her final resting place in the breathtaking Winchester Cathedral.



City break destination

The short distance from London has helped make the case for Winchester as the place for a weekend getaway. This piece in Time Out ticks lots of boxes.

e.g. Time Out - [7 Best things to do in Winchester](#) - featuring heritage, charming architecture, riverside walks, seriously good food, cosy pubs and independent shopping:

Explore Winchester's winding side streets and the amazing independent shops that fill them. Wander along the River Itchen and within seconds you'll be in lush countryside.

Family-friendly destination

Regular round-ups of holiday activities support this theme, dependent upon the programme offered by key attractions as well as the accommodation offer. It's also noted that in a [Go Outdoors survey](#), Winchester was voted as the second best town for a city break.

e.g. Parents News UK – [Visit Winchester this February half-term](#) - features family attractions, heritage and walking trails.
The Telegraph - [40 best family days out for half-term](#) - spotlights the Science Centre's stargazing experiences.

Landscape, views & water meadows

This theme is less frequent but serves to create an ambiance which is very different from that of a larger city. Potential to be expanded upon.

e.g. The Guardian – [Country Diary: This chalky old city gets under your boots](#) - St Catherine's Hill, hillfort, wildlife, almshouses, modern graffiti
'From here, people are enjoying the view. There are paths along the River Itchen's water meadows, the blue-and-bone flint of the Hospital of St Cross and Almshouse of Noble Poverty..'



Vineyards

Another less frequent theme, which could be considered for further development e.g. Conde Nast Traveller – [The best vineyards in England and Wales](#) – flags up Hambledon Vineyard.

‘Ian Kellett took over and, with a focus on English sparkling wine, revived Hambledon to become a 200-acre vineyard and state-of-the-art winery. Naturally, the tour and tasting here recount a lot of this unique history.’

Avington Lakes – city/country breaks

Media interest was sparked by the opening of Avington Lakes, an estate with activities such as wild swimming and paddleboarding e.g. [Conde Nast Traveller](#) and [The Telegraph](#) (above)

It opens up the potential to extend the city/country theme and promote to groups wanting high-quality accommodation, combined with outdoor experiences (e.g. younger travellers or inter-generational).

New York Times

How Britain's newest country estate is luring the middle class to Hampshire

The Avington Estate near Winchester has recently opened to the public

Jane Knight
Travel writer

Related Topics
Europe, Hampshire, United Kingdom, England, Winchester

05 December 2024 5:00pm GMT

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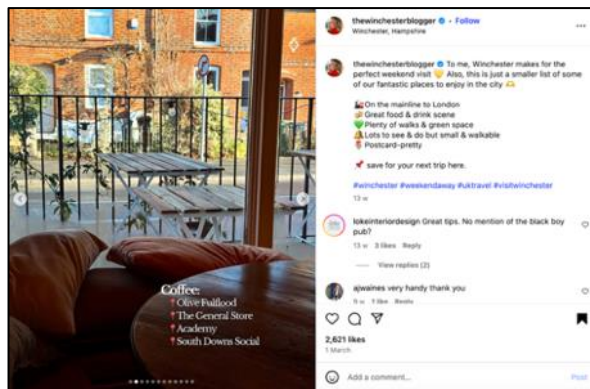
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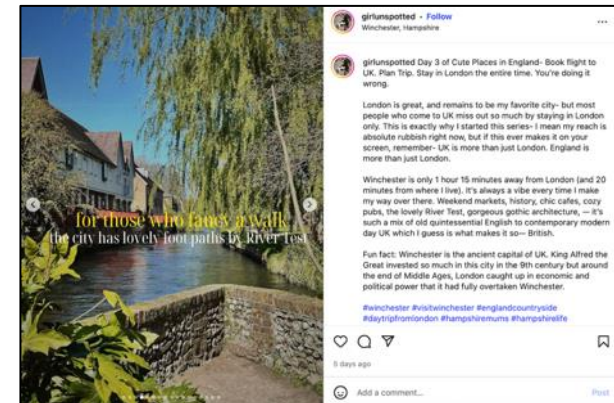
SOCIAL MEDIA

Content for Winchester on Instagram has a more contemporary, lifestyle feel, with a focus on places to eat, drink and shop as well as easy walks and great views.



For example, on Instagram local and regional content creators are posting appealing reels and posts of modern Winchester – for example, [The Winchester Blogger](#) (20k followers) [Miss Winchester UK](#) (14k followers), [Girlyunspotted](#) (25.6k followers), ([Threads by H](#) (5k followers).

This content is enhanced by collaborations with influencers, arranged by Visit Winchester's PR agency. Themes include family-friendly breaks with [@the_piplets](#) (46k followers), the foodie offer with [@foodtravelinspired](#) (73k followers) and heritage with [@stephthearchaeologist](#) (172k followers).



4 VISITOR MARKETS & MARKET TRENDS

KEY FINDINGS

- ▶ The principal existing market is affluent. 55+ ‘Country Loving Traditionalists’ from the South East and London.
- ▶ The two primary growth markets identified are ‘Curious Families’ and ‘Cultural Foodie Explorers’. The existing product matches their requirements and there is potential to attract valuable overnight stays from these segments too.
- ▶ In the longer term, there is scope to develop the younger ‘Experience Seeker’ market.
- ▶ Winchester district’s visitor offer can be developed in response to key visitor trends, including experiential travel, outdoor & nature-based wellness, sustainable tourism, and maximising value. Heritage, landscapes and food & drink all have an important role to play, as well as better links whether physical (trails, bus routes) or promotional (e.g. itineraries).
- ▶ In addition, the wider themes of accessibility and inclusivity will continue to be important to visitors when choosing destinations.

MARKET TRENDS

The table below shows some of the key trends affecting tourism behaviour which are of relevance to Winchester city and district:

| Description | Notes and Implications |
|---|--|
| <p>Experiential travel</p> <p>In recent years the trend towards the pursuit of experience has grown and strongly impacted the tourism and cultural markets. A tourism trip must provide a connection to a place that is different from home and even day visitors continue to seek out unique, immersive experiences that allow them to connect with the places they visit and their people.</p> | <ul style="list-style-type: none">▶ Cuts across heritage, food & drink, festivals and the arts.▶ Local heritage can play an important role when presented in a way which appeals beyond those with a specific interest in heritage – providing access to distinctive learning opportunities and using local stories, animation and events to ‘bring heritage to life’.▶ Vineyard tours and tastings offer another way of playing to this trend and could be further developed. Also works well alongside a focus on shopping for and eating local food.▶ Festivals and events can be important influencers of a visit if developed with visitors in mind.▶ Experiences like visiting artisan studios and markets are also a way of connecting with a place, particularly if hands-on workshops are offered.▶ Independent retail offers should be encouraged in the city centre.▶ All of the above must be distinctive and rooted in place if they are to stand out in a competitive visitor landscape. |

| Description | Notes and Implications |
|--|---|
| <p>Maximising Value</p> <p>People are seeking to achieve maximum possible value for their investment in a tourism trip. Value for money is important but this doesn't necessarily mean low cost.</p> <p>Visitors want to cram a lot into their time, across the day and into the evening.</p> <p>They are seeking to spend their leisure time 'productively' - combining fun /learning/self-improvement/well-being.</p> | <ul style="list-style-type: none">▶ Winchester's location offers an advantage in terms of short travel times for visitors from London and the South East but there is a challenge with regard to presenting enough 'things to do' within the district.▶ Positioning the district as part of a wider destination offer with neighbouring attractions and destinations can help overcome this. This is relevant in light of the new Hampshire, Portsmouth and Southampton LVEP. E.g. regional themed itineraries.▶ There are implications for local product development and for ensuring that visitor experiences are visible and easy to 'join up' into a cohesive visit, both perceptually and physically.▶ Ensuring experiences are of high quality is vital.▶ Development of new experiences focused on 'learning' is an opportunity – specialist breaks, heritage courses, taster sessions, guided tours. Meet the curator, 'behind the scenes' experiences etc. |

| Description | Notes and Implications |
|--|---|
| Outdoor and Nature-Based Wellness People are increasingly recognising the importance of outdoor activity and connection to nature in maintaining physical and mental well-being; and are seeking these experiences on their tourism trips. | <ul style="list-style-type: none">▶ Winchester district is part of a unique landscape – chalk grassland and streams are globally rare habitats and act as bio-diversity hotspots.▶ Connection with this landscape could be leveraged as the city and market towns/villages all offer easy access, and the district lies in the South Downs National Park. Also there's the opportunity to develop experiences such as guided nature walks.▶ Circular walking and cycling routes will help attract different visitor segments to those that are interested in long-distance trails.▶ Themes are useful to make these shorter routes distinct and to enhance appeal to visitors and media. For instance, trails could link towns and vineyards or join interesting heritage/cultural sites.▶ Dark skies tourism continues to grow. With two Dark Sky Discovery Sites in the district, there is potential to develop experiences and events for visitors.▶ With regard to wellness, there is a rise in demand for 'calmcations' offering an escape from the noise of everyday life. Accommodation providers are tapping into this in various ways e.g. upmarket glamping cabins with saunas and hot tubs, through to sleep retreats, digital detoxes and cold water swimming. |


| Description | Notes and Implications |
|---|--|
| <p>Responsible & sustainable tourism</p> <p>The climate crisis is driving changing attitudes towards tourism and an expectation of good environmental practice and activities which reduce impact.</p> <p>Recent research by Tourism South East suggested found 37% of people agreed that sustainability or environmental management would influence their booking, over the availability of cheaper prices. Whilst sustainability is clearly on travellers' minds globally, BVA BDRC's 2021 research² showed that sustainability only influences purchase behaviour at the margins; it will drive decisions but only if all other factors are equal and they will get the additional 'feel good' benefit at no extra cost.</p> | <ul style="list-style-type: none"> ▶ How they travel to and around a destination, where the food and drink comes from and how service providers are managing resources will be of increasing importance to visitors. ▶ Access to the city by rail is great but final mile transportation to market towns/villages and certain key attractions is an issue. ▶ Cycle routes in the city are being improved, whilst the South Downs National Park has a lot to offer cyclists. Bike hire is currently available in the city. ▶ Strong local story in relation to food & drink producers, including farmers' markets, vineyards and watercress heritage. ▶ The unique landscape is excellent for biodiversity and certain attractions are active in the sustainability arena, e.g. the National Park, Winchester Science Centre, Marwell Zoo. ▶ Opportunity to develop sustainable travel and active travel routes linking visitor attractions and experiences in the city and market towns. ▶ Consider ways to promote the district as an interesting sustainable/regenerative tourism destination. ▶ Actions in this area will positively impact on the district's wider goals for environmental sustainability. |

² BDRC Clearsight report on Sustainable Leisure during Covid-19, June 2021

| Description | Notes and Implications |
|--|---|
| Ageing population Growth in 60+/baby boomer cohort in all western countries is significant. Disproportionately owners of wealth so an attractive visitor market segment. Many are fit, well and young at heart- looking for adventure and different experiences. | <ul style="list-style-type: none"> ▶ Consideration should be given to accessibility at accommodation, visitor attractions etc. (which will have wider benefits across markets/segments). |
| Multi-generational travel Desire to meet up and spend time with friends and family is driving holidays, breaks and leisure time. | <ul style="list-style-type: none"> ▶ The range of attractions and family activities must offer a good mix to appeal to all ages. ▶ Promotion of suitable and flexible accommodation - does Winchester have enough to offer multi-generational groups? |
| Accessible travel People with health conditions and disabilities, alongside their travelling companions, are an important segment of the market. | <ul style="list-style-type: none"> ▶ Better accessibility at accommodation, attractions and for activities offers enormous market potential and supports inclusivity. |
| Pets Travel Too Increasing pet ownership and the increase in importance of outdoor and nature based travel has led to more people seeking to bring their dogs on day visits and domestic holidays. | <ul style="list-style-type: none"> ▶ Pet friendly attractions, activities and accommodation will appeal to pet-loving travellers. ▶ Providing pre-travel information to dog owners is important to reassure them that their animal will be welcomed and their needs met. |
| Screen tourism An influential trend amongst both visitors to the UK and those considering a trip to the UK. 9 in 10 potential visitors would be interested in visiting a film or TV location in the UK in the future. | <ul style="list-style-type: none"> ▶ Make the most of any existing film and TV connections e.g. The Crown. ▶ Look at ways to get on the 'set-jetting map' of the future by proactively encouraging use of the district as a location e.g. invite tourism providers to add themselves to the location database; make it easy for production companies to liaise with City Council. |

EXISTING MARKETS

The panel survey indicated that current visitors are typically older (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 3:1. Of those that stay overnight, they are visiting principally from the South East and London, with 1 in 5 travelling from the Midlands and East England. These findings were borne out in the business consultations and in the workshops. They align with the visitor segment known as Country Loving Traditionalists.



| SEGMENT | WHO THEY ARE AND WHAT THEY WANT | RATIONALE | WHAT'S THE OPPORTUNITY? |
|--|--|--|---|
| Country Loving Traditionalists  | <ul style="list-style-type: none"> • Affluent couples or small groups aged 55+ • Take regular UK weekend & midweek breaks • Enjoy heritage, rural landscapes and local culture, especially food & drink • Skew towards living in South East England • Looking for good quality accommodation • Will spend on high quality food & drink | <ul style="list-style-type: none"> • Propensity to spend for quality • Likely to do a lot • Will visit outside of peak season | <ul style="list-style-type: none"> • Core market so continue to attract i.e. not alienate • Create opportunities to encourage repeat visits (further exploration of city and district) and grow overnights. • Will travel out of season. |

VISITOR GROWTH MARKETS

The visitor/non-visitor research indicated that families are the priority growth market. They demonstrated a stronger interest in visiting the Winchester area in the future. For successful engagement, the research showed that the best approach is to communicate the breadth of the visitor offer, extending beyond a focus on the historical centre. The research also indicated that families are more likely to want to choose from a wide range of accommodation types. These findings were echoed in the consultation workshops, where it was evident that the destination has plenty to offer families, although the sector would welcome more accommodation, such as budget/mid-priced hotels.

In parallel, there is scope to draw in cultural foodie explorers, which is a younger segment aged 55 and under. The research indicates that factors which particularly motivate younger audiences (25 to 34) include ‘a seriously good food scene’, ‘characterful market towns where you can mooch’, ‘shopping in independent and artisan boutiques, at big names and at specialist markets’

In the longer-term, there is potential to develop a younger ‘experience seeker’ market. The research indicated that they are very likely to take short breaks and whilst historical architecture and landscapes appeal to them, they are also looking for unique things to do, independent/artisan hospitality and retail as well as festivals/culture. They are more likely to use public transport which is currently a barrier in terms of travelling to experiences in the wider district (e.g. vineyards, stargazing).

| SEGMENT | WHO THEY ARE AND WHAT THEY WANT | RATIONALE | WHAT'S THE OPPORTUNITY? |
|--|--|--|--|
| Curious Families (Primary Market)  | <ul style="list-style-type: none"> Families with school-aged children under 12 May be travelling with grandparents Day trips & short breaks Spending quality time together, making memories Fun for all the family: attractions, culture & events, outdoor activities, learning activities Motivated by value for money but willing to spend on treats. Family-friendly accommodation | <ul style="list-style-type: none"> Will spend on activities to keep children happy May convert from a day visit to overnight given enough to do Active on social media – easy to reach; engage as advocates Keen to make sustainable choices | <ul style="list-style-type: none"> Growing overnights by effective promotion of rounded offer e.g. appealing itineraries, targeted PR and digital marketing Capitalising on visiting friends & relatives |
| Cultural Foodie Explorers (Primary Market)  | <ul style="list-style-type: none"> Couples or friendship groups aged 25 to 55 Affluent professionals Enjoy city and rural breaks Many based in London and the South Looking for good food & drink experiences, history, contemporary culture, beautiful landscapes, independent shopping, some outdoor activities High quality accommodation | <ul style="list-style-type: none"> Take lots of breaks High spenders Will engage in a variety of activities if the offer is right | <ul style="list-style-type: none"> Leveraging the food & drink offer to appeal to this younger segment Capitalising on proximity to London to ensure Winchester is perceived as an easy destination to reach for many in this market Perception change – establishing a more contemporary image for the city & district |

| | <ul style="list-style-type: none"> Heavy users of the internet for travel planning | | |
|---|---|--|--|
| Global Experience Seekers (Development Market)  <p>Photo by Becca Tapert on Unsplash</p> | <ul style="list-style-type: none"> Under 40 and travelling without children in pre-family couples or in friendship groups. UK & international – USA, Canada, Australia, France City and countryside short breaks ‘Only here’ experiences – arts & culture, events, hands-on learning, active, wellbeing Daytime & evening crammed with activities Enjoy heritage, landscape, quality food & drink, socialising Boutique accommodation Public transport & digital connectivity | <ul style="list-style-type: none"> Frequent travellers who spend on unique experiences Active on social media – advocacy & user-generated content (UGC) Actively support local independent businesses. Champions for sustainability & inclusivity. | <ul style="list-style-type: none"> Perception change – cultivating advocacy from a highly online & engaged audience. More overnights – weekends and year round Enhanced reputation for sustainability & inclusivity through advocacy from this segment. |

5 DESTINATION & PRODUCT AUDIT

The destination and product audit highlights the strengths of Winchester district's visitor offer and establish potential for growth; identifies the anchor attractions, events and hospitality businesses, and pinpoints any gaps or shortfall in provision. Please note that the audit focuses on the principal highlights rather than documenting every product. It also includes a number of experiences which sit just outside the authority boundary acknowledging that visitors do not recognise these boundaries and the experiences can help drive or support visits to the district. A map of the major experiences is found here: [product audit map](#) (accommodation specific maps follow later in this section)

KEY FINDINGS

- ▶ Strong heritage theme, with potential to bring everything together to develop further to create a more distinct narrative.
- ▶ Multi-generational/ younger family market is relatively well catered for, but accommodation options are currently lacking for many markets.
- ▶ Easy access to green spaces, including South Downs National Park, which creates scope to leverage the distinctive chalk grassland landscape; make the most of the city's assets, including the chalk stream and water meadows; and promote outdoor activities within a city break context. Developing the eco/sustainable proposition would be highly relevant and could be a springboard for developing related products such as stargazing experiences.
- ▶ Opportunity to own the food and drink theme, including wine tourism and related experiences e.g. foodie map and itineraries.
- ▶ In winter, promotional efforts are centred on the Christmas Market, which is at capacity at weekends. The city would benefit from a strategy aimed at retaining the reputation of the market, whilst spreading footfall and spend further afield.

THE VISITOR OFFER: CORE THEMES

History & Heritage

Recognised as ‘England’s ancient capital’, Winchester has a distinct heritage story. The fifth largest city in Roman Britain, Winchester went on to sit at the heart of political and religious power for centuries. Today, the historic streets are charming, featuring remnants of the city walls, ancient gateways and half-timbered architecture. The heritage offer centres around:

- ▶ [Winchester Cathedral](#) - One of the finest medieval Cathedrals in Europe, with architecturally interesting grounds, Kings & Scribes exhibition, Gormley sculpture and Jane Austen’s grave. Various guided tours, including the Tower.
- ▶ [The Great Hall with Westgate Museum](#) - The remains of Winchester castle, steeped in Arthurian legend with accompanying Museum housed in a medieval gateway.
- ▶ [City Museum](#) - Tells the story of Winchester across three floors, family friendly.
- ▶ [878 AD](#) - Brings Anglo-Saxon Winchester to life with an interactive attraction featuring live performances and a self-led app tour.
- ▶ [Winchester City Mill](#) - Restored by the National Trust, the UK’s oldest watermill with a wildlife-friendly island garden and cafe. Official gateway to South Downs National Park
- ▶ [Wolvesey Castle](#) - Managed by English Heritage, these ruins were once the main residence of the powerful Bishops of Winchester.
- ▶ [The Hospital of St Cross](#) - Atmospheric almshouse with gardens and cafe, set on water meadows. Offers traditional Wayfarer’s Dole.
- ▶ [Winchester College](#) - Themed guided tours available of this long-standing English school. Also in summer 2025, the College is opening No 8 College Street (where Jane Austen spent last weeks of her life).
- ▶ [Military Museums](#) - The historic buildings of Peninsula Barracks are home to [Rifleman’s Museum](#), [Horsepower Museum](#), [Gurkha Museum](#), [Royal Hampshire Regiment Museum](#) and [Adjunct General’s Corps Museum](#). Meanwhile, just outside the city lies [The Royal Logistics Core Museum](#)
- ▶ [Bishops Waltham Palace](#) - Another EH property with ruins, grounds and a small museum.
- ▶ Winchester is a great base to explore nearby literary heritage at [Jane Austen’s House](#) and [Chawton House](#) which lie just beyond the district.
- ▶ Within a 30-minute drive of the district, other heritage attractions include [Gilbert White’s House](#), [Milestones Museum](#) and [Whitchurch Silk Mill](#)

- ▶ History-themed bookable tours are available e.g. official tours from TIC such as Upper Winchester tour, Hidden Waterways of Winchester. Get Your Guide promotes experiences such as Historic Castles & cathedrals walking tour, Alfred the Great Haunted Ghost Tour, Winchester Ghost Walk.
- ▶ VisitWinchester has produced self-guided walking trails e.g. Royal Blood Trail, Tudor Trail. See Literary Links below ref Austen/Keats trails.

Issues and Opportunities

- ▶ Strong Tripadvisor ratings for heritage offer overall, including guided tours. The only exception relates to queries around the ease of downloads of 878 AD App, alongside requests to go 'deeper' with the content i.e. 'don't expect Jorvik Viking Museum'. Also, location of 878 AD is perhaps not the most obvious for a visitor attraction.
- ▶ Paultons Park is opening the Viking realm of Valgard in 2026, is there an opportunity to leverage this theme further within Winchester?
- ▶ Consultees raised the idea of Winchester telling 'the story of England'.
- ▶ Jane Austen is an established theme, although Bath is keen to stake its claim. The Cathedral is installing a commemorative statue and Winchester College has aspirations to open No 8 College Street again, subject to planning permission, either for visits or as an Airbnb. Both initiatives will strengthen the Austen story. Potential to use Austen in combination with performing arts expertise to create new take on an old theme.
- ▶ Super Explorer and Explorer Ticket offer combined entry to the Great Hall, Westgate Museum, City Museum and 878 AD (as Historic Winchester/ Hampshire Cultural Trust) - could it extend to other attractions or be used to promote other aspects of the destination?
- ▶ Potential to leverage the historic architecture and ambiance in marketing, such as gateways, passageways, cobbled lanes.

Visitor Attractions

There is a range of visitor attractions with appeal across a variety of markets:

- ▶ [Winchester Science Centre & Planetarium](#) - Interactive exhibits and live science demos in South Downs National Park
- ▶ [Marwell Zoo](#) - Animal attraction with playgrounds, themed holiday activities.
- ▶ [Watercress Line](#) - Heritage railway, with children's events, Harry Potter bridge and themed experiences for all ages.
- ▶ [Bombay Sapphire Distillery](#) - Offers tours & experiences, plus cafe and cocktail bar, at Laverstoke Mill.

- ▶ [NT Hinton Ampner](#) - Elegant country house and gardens with walking routes around the estate.
- ▶ [Sir Harold Hillier Gardens](#) – 180-acre gardens and arboretum, plus plenty to occupy young children, Restaurant, Cafe & Tea Rooms.
- ▶ [Clue Capers](#) – Escape Room experiences available at city centre venue, outdoors and at Hospital of St Cross.
- ▶ Family attractions/activities within a drive of the district include [Paultons Park](#), [Manor Farm Park](#), [Bird World](#), [Romsey Rapids](#).

Issues and Opportunities

- ▶ Plenty to occupy families with younger children and inter-generational markets, when combined with heritage and outdoor activities.
- ▶ Limited accommodation options for families looking at hotels at the lower/mid-range budget or for larger group options.
- ▶ Projects in the pipeline include The Science Centre's aspiration to create a year-round indoor and outdoor offer, now that it has acquired the land surrounding it in the National Park. Marwell Zoo is also looking to add lodges onto their site which would appeal to the family market.
- ▶ Paultons Park plans to build [new accommodation](#) for up to 700 guests at its site, a 30-minute drive from Winchester. Similarly, Great Wolf Resorts is in discussion regarding an indoor waterpark in Basingstoke, with a 500-bedroom hotel, also half an hour away in the car. If the city were to intensify its focus on families, could these developments be beneficial e.g. joint itineraries and promotions, two-centre family breaks.

Natural Landscape, Nature and Outdoor Activities

A large tranche of the Winchester district lies in the South Downs National Park, with Winchester City Mill identified as the gateway to the park and the official start point of the South Downs Way National Trail. In addition to walking, the Park welcomes cycling and horseriding.

As a designated International Dark Sky Reserve, the Park is also superb for stargazing, with the Winchester district having two Dark Skies Discovery Sites. The area's chalk grasslands and streams are rare and attract biodiversity, such as butterflies.

Beyond the identified nature reserves and country parks, it is noted that Winchester's position on the River Itchen and its water meadows means nature is always nearby. The same is true of the market towns, where there's easy access to chalk streams, ponds and water meadows, such as Great Weir, Old Alresford Pond, Millennium Trail & Arle Valley Trail in Arlesford; Wickham Water Meadows Walk (River Meon); and the ponds in Bishops Waltham.

- ▶ South Downs National Park - Offering easy access on foot from the city to diverse landscapes and wildlife.
- ▶ Winnall Moors Nature Reserve - A city wetland and wildlife haven with paths, boardwalk and kids' trails.
- ▶ St Catherine's Hill Nature Reserve - Climb 220ft up wooden steps for city and valley views. Home to many butterflies and orchids.
- ▶ Old Winchester Hill Nature Reserve (NNR) - 150 acres, features a former iron age hill fort and accessible trail. Dark Sky Discovery site, along with Winchester Science Centre.
- ▶ Farley Mount Country Park - Open downland and ancient woods with a folly.
- ▶ Magdalen Hill Down - A mile's walk from the city, a haven for butterflies and wildflowers.

There are many walks available, from long-distance trails to local routes, including:

- ▶ The 100-mile [South Downs Way](#), a National Trail, plus many shorter routes in the National Park, e.g. [Meon Valley Trail](#)
- ▶ Other long-distance walks include [St Swithuns Way](#), [The Itchen Way](#), [The Wayfarer's Walk](#) and [The Watercress Way](#).
- ▶ Short circular walks include routes on the [NT Hinton Ampney estate](#), with links to English Civil War, as well as loops starting in the city or one of the market towns, such as the Keats Trail & Viaduct Way, Bishop's Waltham Nature Walk and Arlesford Watercress Trail circular.

The district has plenty to offer cyclists too, with both on-road and off-road routes available.

- ▶ The city is a popular start/stop location for the South Downs Way and on the route of the 220-mile King Alfred's Way.
- ▶ Trails such as Meon Valley, The Watercress Way and the Itchen Way are also cycle routes.
- ▶ Facilities for cyclists include the cycle cafes South Downs Social and The Handlebar Cafe, whilst bike hire is available from The Cycle Co in Shawford. (N.B. Bespoke Biking - now Exo:The Winchester Bike Hub not currently offering bike hire).
- ▶ Can also bike around historic streets and water meadows.

There is a small, relatively new wellness offer

- ▶ [The Pumphouse Winchester](#) has a wood-fired hot tub and sauna, as well as a cold-water dipping pool. Booked exclusively or as shared session.
- ▶ [Tukha Talo](#) in nearby Cottonworth offers the award-winning lakeside sauna The Fallen Willow and has another site called The Woodland Sauna.
- ▶ [Avington](#) has a range of wellness options available to guests only, including wild swimming and sauna pod as well as more active experiences such as paddleboarding and kayaking.

A couple of additional outdoor activities to mention are as follows:

- ▶ [YMCA Fairthorne Manor](#) is near to the River Hamble. It hires out paddleboards and canoes, whilst self-launch is also available for a small fee. One-to-one coaching is also available.
- ▶ Fly fishing on the River Test in nearby Stockbridge, offered by [Lainston House](#) or can be independently booked at [Leckford estate](#).

Issues and Opportunities

- ▶ Dark skies tourism continues to grow as a trend. The Winchester district could reinforce its reputation for dark skies e.g. Dark Skies friendly accreditation for businesses, guided night-time walks, stargazing equipment provided at accommodation, more stargazing experiences at Science Centre, evening events at Marwell Zoo with nocturnal animals etc.
- ▶ The landscape and wealth of nature reserves also present an opportunity for the district to lean into the concept of eco breaks, particularly as this is a focus for some attractions in particular and is also relevant to accommodation providers.
- ▶ With regard to walking, it would be helpful to have a sense for how many people actually use the district as a base for walking breaks versus those that want shorter walks as part of a city break. Do themed circular routes need more promotion and development? E.g. Wine walks, making the most of water meadows, views from St Catherines Hill etc. (n.b. popular on Instagram)
- ▶ The location, routes and existing markets lend themselves to making more of off-road family cycling adventures, perhaps as part of a wider family offer; and using Winchester as a 'jumping-off' point for longer distance touring and adventure routes (S Downs Way and King Alfred Way). Working with existing providers to elevate this offer could help strengthen the districts credentials for sustainable and 'slow-tourism'.

Food & Drink

Pitched as Hampshire's food and drink capital, Winchester is home to independent places to eat, fantastic producers, the UK's largest farmers' market and foodie events. N.B. Vineyards are pulled out separately as the sector is sufficiently comprehensive to stand alone.

- ▶ Fine dining - Chesil Rectory, Pulpo Negro (New Alresford), The Avenue at Lainston House
- ▶ Upmarket chains - Rick Stein, Hotel du Vin, The Ivy, Brasserie Blanc
- ▶ Casual dining & family-friendly eateries - Kyoto Kitchen, Piecaramba!, Three Joe's, Shoal, Stable Pizza
- ▶ Cafes: Cabinet Rooms (also cocktails), Open House Deli, Hoxton Bakehouse (W & BW), No 60 (BW)
- ▶ Traditional pubs & modern bars serving food: The Old Vine, The Wykeham Arms, Overdraft, The Shoe Exton, The Chestnut Horse
- ▶ Farmers' Markets - Hampshire Farmers' Markets runs markets in Winchester (2nd & last Sundays) and Alresford (3rd Sunday)
- ▶ Foodie events - Alresford Watercress Festival, FizzFest, Cocktail Week etc
- ▶ Breweries & distilleries – Bombay Sapphire Distillery, Dummerdown Brewery (Fri/Sat evenings)
- ▶ Local producers - including, vineyards, The Troutlet, The Wasabi Company (watercress), Winchester Distillery, Jude's Ice Cream
- ▶ Experiences – cookery classes & demos at Lainston House

Issues and Opportunities

- ▶ Well-regarded independent eateries such as Inn the Park and The Black Rat have closed, suggesting the sector is experiencing tricky times, despite the affluence of the district.
- ▶ Past media relations activity (e.g. Time Out, 2018) had some success in positioning Winchester as a foodie city. However, focusing purely on places to eat can prove difficult in PR terms as they're not a source of constant news.
- ▶ The farmers' markets, events such as the Watercress Festival and FizzFest, together with high-quality producers and Vineyards (see below) form the basis for a rounded offer with seasonal highlights. Offers potential for foodie itineraries/map and themed breaks to build Winchester's foodie reputation.

Vineyards

Winchester district is home to England's oldest commercial vineyard. The area's south-facing hills, warm climate and chalky terrain has led to the growth of the sector, with several vineyards now inviting visitors to experience tours and tastings.

Producers come together as the '[Vineyards of Hampshire](#)' and host sell out events. [FizzFest](#) in June features tastings, talks, masterclasses and tours, whilst November's Festive Fizz is billed more as a pre-Christmas shopping experience.

Within the district boundary lies:

- ▶ [Hambledon Vineyard](#) - Birthplace of English wine, various experiences including safari tour and tasting. Smart new restaurant.
- ▶ [The Grange](#) - Seven miles east of Winchester, offers tours and tastings, plus upmarket self-catering accommodation on the estate.
- ▶ [Raines](#) - Award-winning boutique vineyard, offering tours & tastings, plus weekend walk-ins to the Tasting Barn for wine grazing platters, Sunday cream tea & fizz. Walkable from Cheriton and Alresford along the bridleway.
- ▶ [Exton Park Vineyard](#) - Offers pre-booked tours and tastings, alongside operating a large event space, Exton Hall.
- ▶ [Quob Park Estate](#) - Tours and tastings available year round, plus experiences such as 'Battle of the pairings', 'picnics in the vines', plus 'old house' hotel & spa and farmhouse accommodation.

Just beyond the district boundary, there are:

- ▶ [Hattingley Valley](#) - An award-winning winery offering tours, tastings and special events e.g. English Wine Week open weekend.
- ▶ [Black Chalk Estate](#) - Tasting Room & Courtyard open for wines by the glass or flight plus platters. Self-guided tours, bookable tours and tastings plus private Treehouse tasting experience. Four holiday treehouses in total, promoted separately as [Wild Escapes](#).
- ▶ [Danebury Vineyard](#) - Only open for special events or group visits.

There are also two options for organised vineyard tours:

- ▶ [Grape & Grain Tours](#) - Offer a guided Vineyards of Hampshire tour which includes visits to two wineries, gastropub lunch, additional wine tasting and transport. An alternative itinerary combines a winery with the gin distillery and a brewery.
- ▶ [Hampshire Wine Tours](#) - Collect visitors from their accommodation and escort them to a selection of vineyards in the South Downs National Park, including some not normally open to the public. Includes a visit to Quob Park (parent company).

Issues and opportunities

- ▶ Winchester's connection with wine is relatively weak as it tends to be promoted under the Hampshire banner e.g. [Vineyards of Hampshire](#) does not promote any obvious association with Winchester, yet their members lie either within or just outside the boundary. With a new Chair in place, there is enthusiasm to build the connection with the City Council and promote proximity to the city and vice versa.
- ▶ The product is relatively strong in terms of volume/range so there is an opportunity to build Winchester's brand association with wine e.g. refreshed destination narrative for the city; working with partners to ensure mentions of Winchester in the context of local vineyards.
- ▶ From a marketing perspective, wine-themed breaks based in the city or market towns would be of visitor and media interest, as would broader foodie itineraries.
- ▶ Developing a collection of walking routes or cycle trails to wineries would also be a marketing/PR asset. Raimes already highlights the footpath link with Cheriton and Alresford. There may also be slow travel options, such as convenient bus routes.
- ▶ Regarding product development, the vineyards are starting to add more events to their calendars, such as regular wine garden evenings, some with food. These events could help reinforce Winchester's foodie vibe.
- ▶ Some vineyards have accommodation and in the longer term, creating more on-site accommodation and encouraging 'vineyard stays' would help embed the wine tourism offer. Examples include, [Ashling Park in Sussex](#), [Three Choirs In Gloucestershire](#), [Woodchester Valley in the Cotswolds](#).

Shopping

Cited by VisitBritain as an iconic shopping destination, the retail offer is broad and mixed, from markets to artisan boutiques, as well as the annual Christmas Market:

- ▶ Independent shopping in the city and market towns, both contemporary and traditional e.g. The Hambledon, The Consortium, Ellie & Bea, H&B Style, Mint Tea Boutique, P&G Wells, Long Barn Lavender Farm.
- ▶ Winchester Cathedral Christmas Market is recognised as one of the best in the UK.
- ▶ Largest farmers' market in UK (see food & drink above).
- ▶ Winchester Street Market takes place every Thursday, Friday and Saturday. Plus monthly themed markets focused on Antiques, Vintage, Retro & Collectables, plus Art & Design.

Issues and Opportunities

- ▶ Christmas Market is at capacity at the weekend, causing queues along nearby streets, but would like more visitors in the week – ideally from groups.
- ▶ Many feel that the Market dominates Christmas messaging and would like to see a broader approach which promotes the city offer as a whole.
- ▶ Cathedral hopes to replicate the success, currently looking at plans for a contemporary makers' market.
- ▶ Showcasing retail within itineraries as well as influencer activity is worthwhile as the independent offer helps make Winchester distinct.

Literary Links

Winchester has well-established literary connections, with the district and county currently celebrating Jane Austen's 250th.

- ▶ Jane Austen - Buried in Winchester Cathedral, following her final days spent at a residence on College Street. She had strong links with Winchester College which is currently opening No 8 College Street (see heritage above) and the Cathedral has commissioned a commemorative statue. The city/district is a good base for Jane Austen's House and Chawton House (25-minute drive, 64 bus). Visit Winchester has produced a self-guided walking tour of Austen's Winchester, also guided walking tours available. Further bookable experiences on offer (e.g. Get your Guide) include Jane Austen themed trip from Southampton (cruise terminal) and a Chawton village tour to explore Austen links.
- ▶ John Keats - A stay in Winchester and a regular walk along the water meadows inspired 'Ode to Autumn'. Visit Winchester has produced a self-guided walking tour which follows in his footsteps.

Issues and opportunities

- ▶ The main Jane Austen experiences are beyond Winchester district boundary but still help drive visits as the city makes a great base, particularly given the Cathedral connection.
- ▶ Various Austen packages on offer this year to celebrate the anniversary - may be potential to continue in future years if they prove successful.
- ▶ Slow travel literary itineraries may appeal to some markets e.g. taking Bus 64 to Chawton.

Arts & Culture

In addition to the events and festivals outlined below, Winchester has a selection of cultural venues and offerings:

- ▶ [Theatre Royal](#) - Heritage 400-seat theatre, with busy programme and cafe bar.
- ▶ [The Nutshell Arts Centre](#) - Music, exhibitions and theatre.
- ▶ [The Chesil Theatre](#) – Leading amateur theatre with plans to expand.
- ▶ [The Arc](#) - Home to the library, a gallery space, workshops etc
- ▶ Private art galleries such as [Clarendon](#) and [Castle Fine Art](#).
- ▶ Hands-on workshops are also on offer at spaces such as [The Colour Factory](#), [Design Junction](#), [Bella Crafts](#)
- ▶ Plus relevant events such as Hampshire Open Studios and trails including [Eye Openers](#)

Issues and opportunities

- ▶ Potential to feature in targeted itineraries.

ACCOMMODATION STOCK IN WINCHESTER

Hotels & Guesthouses

Winchester District demonstrates a strategic and relatively even distribution of hotels and guesthouses, with a strong concentration around key urban centres and travel corridors. The district benefits from proximity to major roadways (A34, M3, M27) and access to tourist destinations, such as the historic city of Winchester and the South Downs National Park.

The map indicates a well-spread network of hotels/guesthouses primarily clustered around:

Winchester City Centre

- ▶ The densest concentration of accommodation options is found in and around the historic core of Winchester.
- ▶ Close proximity to Winchester train station and major roads supports visitor access

Northern Cluster (Sutton Scotney, South Wonston, and North of Kings Worthy)

- ▶ Several establishments are located along the A34 and A303 corridors.
- ▶ Near to the arterial routes linking Oxford, Newbury and the Midlands to the South Coast.

Southern and South-Eastern Cluster (Chandler's Ford, Bishop's Waltham, and Wickham)

- ▶ These areas provide convenient stopovers for visitors heading toward the Solent, Fareham, and Portsmouth.
- ▶ Bishop's Waltham and Wickham, both with rich historical and cultural offerings, act as local tourism draws.

South-Western Fringe (Near Eastleigh and Southampton)

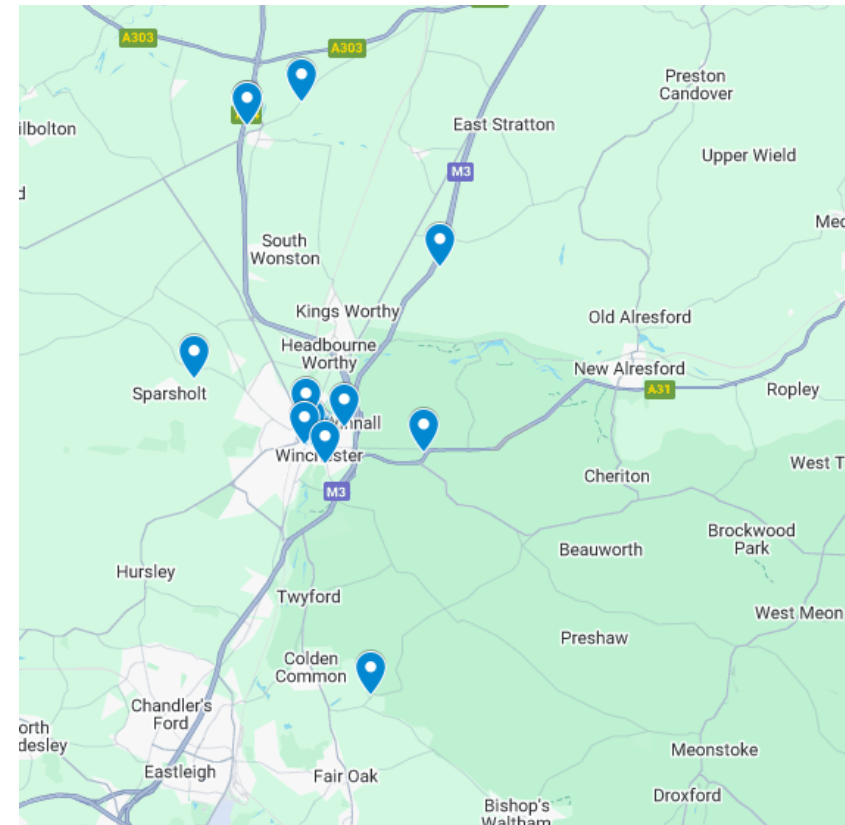
- ▶ Locations here may serve dual markets: those visiting Winchester District and others travelling to or from Southampton.
- ▶ Good transport links via M27 and M3 offer accessibility.

Gaps across the District have less coverage in central rural areas and may be due to lower demand or restrictions in conservations areas such as the South Downs National Parks.

To the west of the District, areas such as Stockbridge and Middle Wallop have minimal accommodation available and could be an area for development

In general, the distribution of hotels and guesthouses in Winchester District is largely shaped by proximity to transport corridors, concentration of cultural and historical sites and accessibility to neighbouring hubs like Southampton and Portsmouth.

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B&B'S

The B&B stock in the region is predominantly concentrated in and around Winchester city, with additional properties dispersed across the countryside and neighbouring towns. Key locations include:

Central Winchester:

- ▶ The city core hosts a dense cluster of B&Bs, catering to visitors who may be drawn by historical landmarks such as Winchester Cathedral, the Great Hall, and various cultural events. Proximity to the train station and city amenities enhances their appeal.

North and East of Winchester:

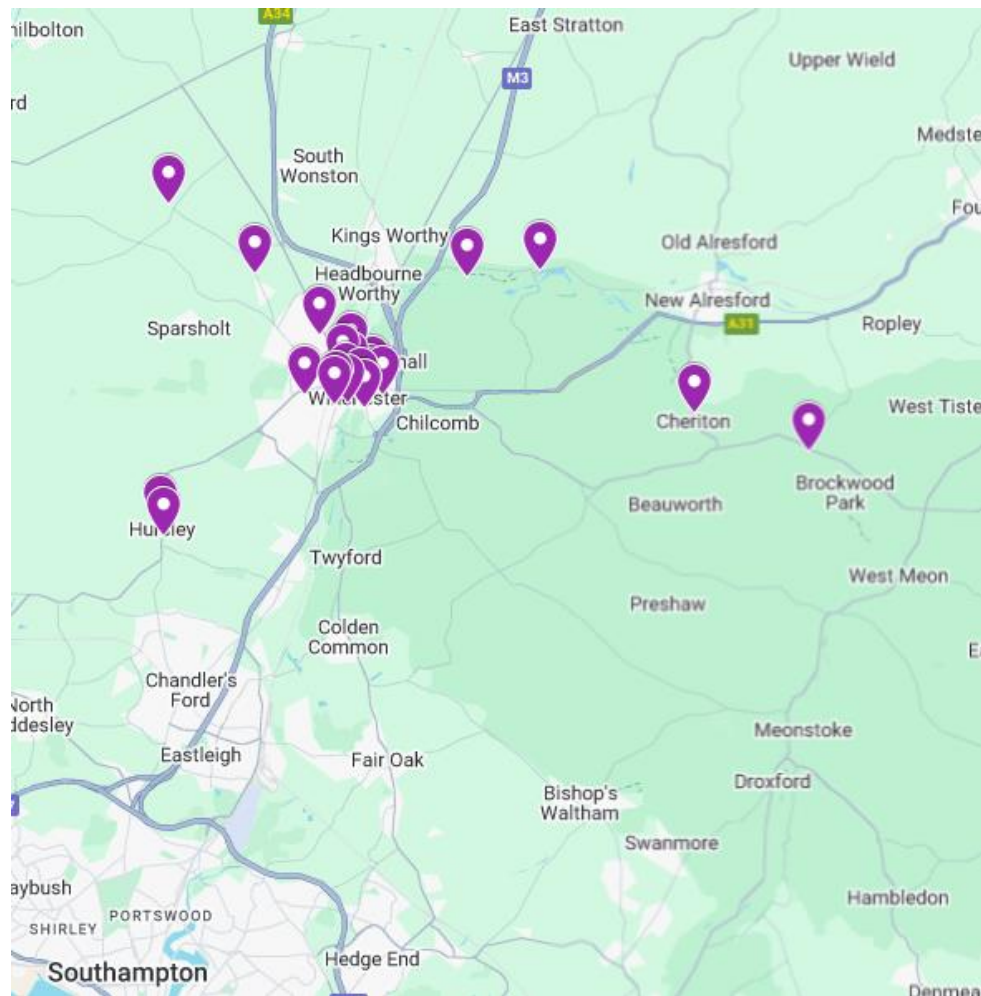
- ▶ Villages such as Kings Worthy, Headbourne Worthy, New Arlesford and Cheriton feature a scattering of rural B&Bs. Benefit from easy road access (A34, A31 and M3) whilst still have a quiet rural feel. Ideal for those wanting to be near the city but prefer a more peaceful location.

South of Winchester:

- ▶ Areas like Twyford, Bishop's Waltham, and Swanmore show a modest spread of B&Bs that benefit from proximity to both rural attractions and the economic hubs of Eastleigh and Southampton.

South-East Cluster (Whiteley, Hedge End):

- ▶ B&Bs here serve a dual market—leisure visitors exploring the Meon Valley and business travellers attending conferences or working in local business parks.



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Self-Catering

Self-catering units are well-distributed throughout the Winchester district, with notable concentrations in:

Central Winchester and its immediate fringe:

- ▶ A modest number of properties are based within or near the city centre, appealing to urban explorers and visitors wanting walkable access to historic sites restaurants, shops and transport links.

North and East of Winchester:

- ▶ Areas in the North like Sutton Scotney, South Wonston, Kings Worthy and Headbourne Worthy spread along the A34 and the A303 corridors. Convenient for travellers heading both to and from the Midlands and Oxford. Properties to the East including Itchen Abbas, Alresford, Cheriton and Hinton Ampner along the Itchen Valley and beyond towards the South Downs National Park. Includes historic market towns and nearby National Trust attractions.

South Winchester Cluster:

- ▶ Twyford, Colden Common, Baybridge and Morestead are all to the south of Winchester towards the M3 and Eastleigh and show a number of rural properties set in farm and woodland areas. Good proximity to road and airport connections make them attractive to travellers.

West Winchester Cluster:

- ▶ Locations such as Sparsholt, Hursley, Standon and Farley Mount also provide a spread of properties in the self-catering sector. They lie west of the city in greenbelt and woodland areas and again have good access to the A34 and M3 road links.



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The self-catering accommodation stock is evenly distributed across the district in both urban and rural areas. Good alignment with transport routes such as the M3, A34 and A31 leading to many natural and cultural attractions. Overall, rural properties dominate offering access to the great outdoors.

Caravan and Camping

Concentration Around Winchester City

Several sites are located close to Winchester itself, particularly to the east and north of the city. These include well-established caravan parks and motorhome sites such as the **Morn Hill Caravan and Motorhome Club Site**, which provide easy access to the city centre via road and public transport links. Their locations offer a balance of urban proximity and rural tranquillity, appealing to short-break tourists and festival-goers.

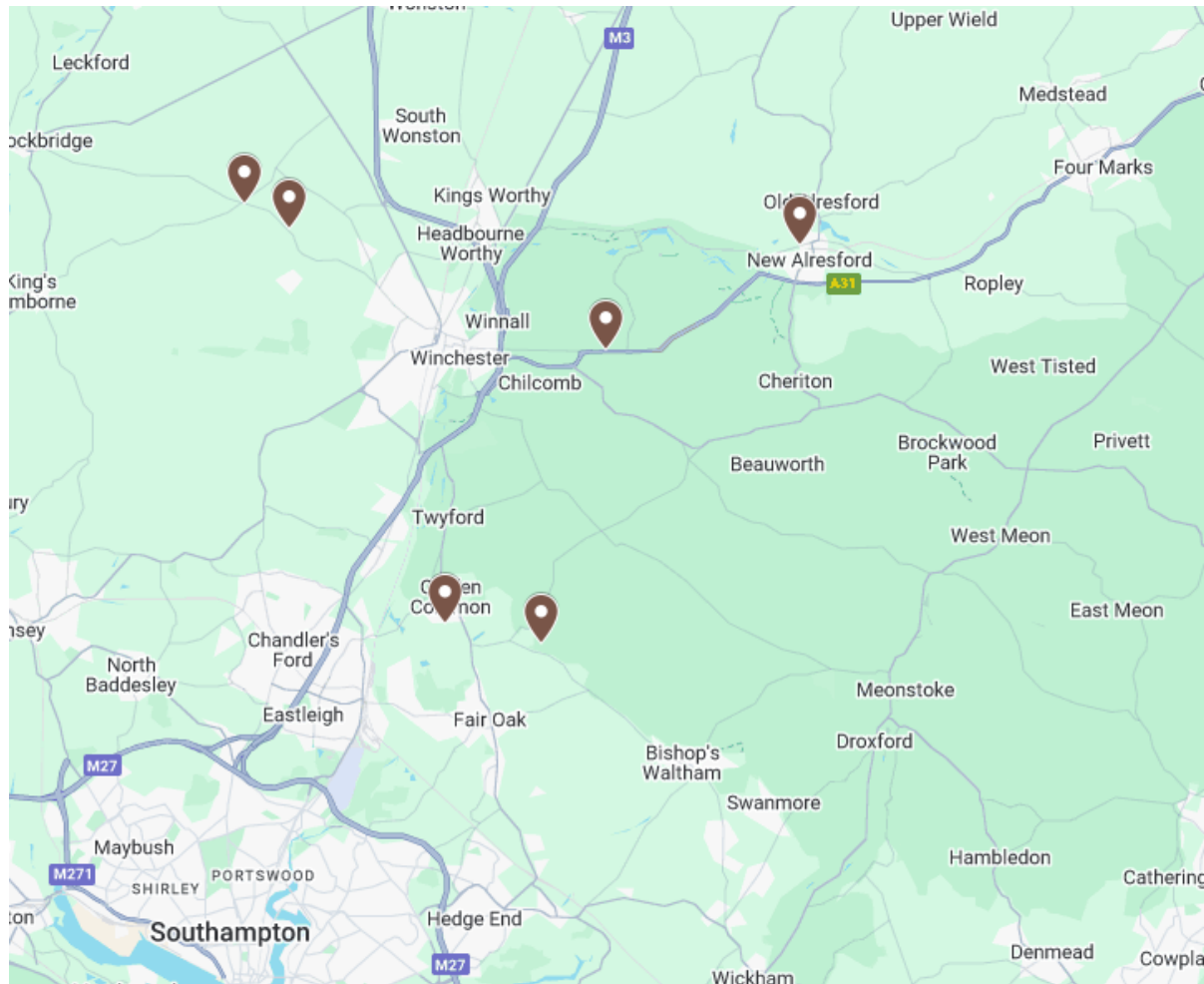
Southern Cluster: Colden Common and Owslebury

A cluster of camping and glamping options can be found in the south of the district, particularly in **Colden Common and Owslebury**. These sites, including **Marwell Resort**, cater to families and outdoor enthusiasts, with proximity to Marwell Zoo and outdoor activity centres. The area benefits from its location on the edge of the South Downs, offering both woodland and open countryside.

Eastern Sites: New Alresford and Surroundings

To the east, near New Alresford, are additional sites that serve as gateways to the South Downs Way and the Watercress Line heritage railway. These locations are popular with walkers, cyclists, and heritage tourists. Alresford's scenic appeal and event calendar (e.g. Watercress Festival) increase the desirability of accommodation in this area.

A smaller number of sites appear to the **northwest and west** of Winchester, extending toward the Test Valley boundary. These are likely more secluded, small-scale campsites or glamping units, appealing to visitors seeking peace and quiet or stargazing opportunities in darker sky areas. Road access is slightly more limited in these areas, which may restrict high-volume tourism but supports a niche for low-impact stays.



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Alternative Accommodation in Winchester District

Shepherd's Huts

- ▶ Meon Springs: Located in the Meon Valley, Meon Springs offers lakeside shepherd's huts equipped with double beds, wood-burning stoves, and firepits. Guests can enjoy activities like fly fishing, clay shooting, and yoga sessions during their stay. meonsprings.com
- ▶ Avington Estate: Situated in the Hampshire countryside, Avington Estate provides shepherd's huts like Elizabeth's Hut and Henry's Hut, featuring king-sized beds, log burners, and skylights. Guests can indulge in outdoor dining and wellness experiences such as lakeside saunas and wild swimming. avington.com
- ▶ Two Hoots Glamping Site: Nestled in the village of Bighton, this site offers two shepherd's huts with panoramic views over the Hampshire countryside. The location is ideal for exploring nearby attractions like the historic Watercress Line and the Georgian market town of Alresford. twohootsglampingsite.co.uk
- ▶ The Fox Inn, Bramdean: This 17th-century country pub provides accommodation in the form of two shepherd's huts located in its gardens, offering a blend of rustic charm and modern comfort. <http://www.thefoxbramdean.co.uk/>

Yurts

- ▶ Meon Springs Yurt Village: Also part of Meon Springs, the Yurt Village features six traditional Mongolian yurts, each accommodating up to six people. The yurts are equipped with wood-burning stoves and have access to a communal cooking and dining area known as the Yurtery. meonsprings.com+1visit-hampshire.co.uk+1
- ▶ Ark Buffalo: Located in the heart of Hampshire, Ark Buffalo's Yurt Camp offers a cosy and tranquil retreat with a touch of rustic luxury, providing an immersive glamping experience. <https://www.arcbuffalo.com>

Glamping Pods/Bell & Safari Tents

- ▶ Wallops Wood Glamping: Set in the South Downs National Park, Wallops Wood offers traditional shepherd's huts and cosy glamping houses for quiet retreats. The off-grid huts are situated in a secluded meadow, surrounded by ancient bluebell woods. <https://www.wallopswoodglamping.co.uk>
- ▶ Two Hoots Glamping Site: An adult-only site near Winchester offering glamping pods with panoramic countryside views. twohootsglampingsite.co.uk
- ▶ Marwell Resort: Offers bell tent glamping with garden views, shared kitchen facilities, and outdoor fireplaces. belltentglampingmarwell.co.uk+3big-cottages.com+3booking.com+3

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- ▶ Bell Tent Glamping Marwell: Provides heated family glamping tents with beds, carpets, lighting, and access to shared kitchenette facilities.
belltentglampingmarwell.co.uk
 - ▶ Marwell Resort: Offers bell tent glamping with garden views, shared kitchen facilities, and outdoor fireplaces.
<https://www.belltentglampingmarwell.co.uk/>
 - ▶ Marwell Resort: Offers safari tents available for reservations from April to October, suitable for stays of three to seven nights.
<https://marwellresort.co.uk/accommodation/safari-tents/>
 - ▶ Beechen Glamping: Located near the South Downs National Park, offering luxury safari tents like Hazel Safari and Hawk Lodge with stunning views.
beechenglampinghampshire.co.uk

SOUTH-EAST PRIVATE RENTAL DATA 2022-2024

This is an overview of the South East short-term rental market performance for the period January to December 2024, compared with the same periods in 2023 and 2022. Over the three years, the market has experienced sustained growth across all major indicators, reflecting an increasingly robust and balanced environment for both hosts and guests.

| Period | Jan to December 2024 | Jan to December 2023 | Jan to December 2022 |
|---------------------------|----------------------|----------------------|----------------------|
| Market | South East | South East | South East |
| Listing Nights Available | 9,677,529 | 8,835,139 | 7,854,958 |
| Listing Nights Booked | 5,394,809 | 4,883,681 | 4,491,508 |
| Room Nights Available | 19,149,886 | 17,361,720 | 15,147,197 |
| Room Nights Booked | 10,584,712 | 9,494,499 | 8,554,716 |
| Revenue £ | 909,246,290 | 807,441,778 | 707,398,593 |
| ADR £ | 166 | 164 | 155 |
| RevPAR | 91 | 89 | 88 |
| Available Listings | 418,604 | 385,660 | 345,915 |
| Booked Listings | 387,548 | 357,062 | 323,888 |
| Occupancy Rate | 55% | 54% | 56% |
| Length of Stay | 3.3 | 3.4 | 3.2 |
| Booking Lead Time (days) | 54 | 57 | 54 |

Source: Tourism South-East

Supply has expanded significantly. The number of listing nights available increased by over 23% from 2022 to 2024, while room nights available rose by more than 26% in the same period. This growth in available accommodation was accompanied by a rise in the total number of listings, which grew from approximately 346,000 in 2022 to nearly 419,000 in 2024.

Demand has grown in parallel with supply, which is a strong indicator of market health. Booked listing nights were up by more than 20% from 2022 to 2024, and room nights booked rose by nearly 24%. The number of booked listings followed a similar upward scale, increasing by almost 20% over the same period. This balanced growth on both sides of the market indicates that increased supply has not outpaced guest demand, allowing occupancy rates to remain stable without creating competitive pressure that might reduce profitability.

Financial performance further reinforces the strength of the market. Revenue increased from approximately £707 million in 2022 to over £909 million in 2024, representing a gain of more than 28%. This uplift has been driven largely by volume rather than price. The average daily rate (ADR) increased modestly from £155 to £166 over the period, while revenue per available room (RevPAR) moved only slightly from £88 to £91. This points to a market environment where pricing remains competitive, but booking activity is high, ensuring strong total revenue growth.

Operationally, the market has remained stable. Occupancy rates were consistent over the three years, ranging between 54% and 56%. The average length of stay saw a slight decline, moving from 3.4 days in 2023 to 3.3 days in 2024, while the average booking lead time returned to 54 days in 2024 after peaking at 57 days the year before. These shifts may reflect subtle changes in traveller behaviour, such as a tendency toward shorter, last minute trips. In summary, the South East short-term rental market continues to demonstrate a healthy and sustainable path. Supply and demand are expanding in tandem, revenues are growing steadily, and operational metrics indicate a well-functioning market with no significant signs of stress, the region appears well-positioned to carry this momentum into 2025.

South-East v Winchester - Private Rental Data 2023

Winchester has a much smaller number of listing nights available compared to the South East region as a whole. However, its booking volume is disproportionately high relative to its size, indicating intense demand pressure on limited supply.

With a higher ADR and occupancy rate, Winchester delivers better performance per available unit. This leads to a significantly higher revenue per listing when compared to the regional average.

The slightly shorter average length of stay in Winchester suggests a market skewed toward short breaks, business trips, or visitors passing through, possibly reflecting its proximity to major cities and transport links.

| | 2023 | 2023 |
|--------------------------|------------|-------------|
| Market | Winchester | South East |
| Listing Nights Available | 479 | 34,204 |
| Listing Nights Booked | 79,534 | 5,338,003 |
| Revenue £ | 14,548,812 | 936,944,083 |
| ADR £ | 183 | 175 |
| Occupancy Rate | 58% | 55% |
| Length of Stay | 2.8 | 3 |

Source: Tourism South-East

Although Winchester is a much smaller market in terms of how many listings are available, it actually stands out for how well it performs — with higher occupancy, higher nightly rates, and more revenue per property.

Winchester had just 479 available listing nights in 2023, compared to a huge 34,204 in the South East. Despite this, Winchester still racked up over 79,000 booked nights — which is impressive considering its size. Meanwhile, the South East as a whole saw over 5.3 million booked nights.

When it comes to money, Winchester brought in £14.5 million in total revenue, while the South East made £936.9 million. The South East's figure is much larger, but Winchester's earnings per listing were significantly better.

The average daily rate (ADR) in Winchester was £183 — slightly higher than the £175 average in the South East. Occupancy was also stronger in Winchester, with 58% of available nights booked, compared to 55% regionally. People tended to stay slightly fewer nights in Winchester too (2.8 nights vs. 3), suggesting it might be more popular for weekend getaways or overnight business trips.

FESTIVAL & EVENTS

Annual Events in Winchester District

The Winchester District hosts a vibrant range of cultural and creative events each year, spanning music, food, heritage, and the arts. It demonstrates a vibrant and well-rounded cultural calendar that embraces its historical roots, celebrates artistic expression, and brings communities together through shared experiences. Events range in scale and theme, offering something for everyone—from heritage enthusiasts and music lovers to foodies and families.

Most events are long-established, with many having evolved and grown over the past decade or more, demonstrating sustainability and continued public interest. There is a clear opportunity to further support and grow these events by improving accessibility, promoting cross-event marketing, and investing in infrastructure that can accommodate diverse audiences and larger-scale programming.

As the district continues to develop its cultural strategy, the richness of this annual programme stands as a testament to Winchester's identity as a leading cultural destination in the South East of England. The following summary lists major annual events in date order, highlighting the diversity and appeal of the area's festival and events calendar.

The 250th Jane Austen celebrations are taking place throughout the year and a list of all the events can be found at <https://www.visitwinchester.co.uk/jane-austen-250>

Winchester Chamber Music Festival

Dates: 2–5 May 2025

Location: Various venues in Winchester

A celebration of chamber music, this festival brings together acclaimed musicians for performances, masterclasses, and educational outreach. It aims to make classical music accessible and engaging for all audiences. www.winchesterchambermusic.com

Winchester MayFest

Date: 17 May 2025

Location: Winchester

A festival celebrating traditional English folk music and dance. MayFest includes performances by Morris dancers, folk bands, and opportunities for public participation, preserving and promoting cultural heritage. <https://www.visit-hampshire.co.uk/whats-on/mayfest-p588191>

Alresford Watercress Festival

Date: 18 May 2025

Location: Alresford

Celebrating the town's association with watercress farming, this festival includes a street market, cookery demonstrations, and the famous watercress eating competition. It's a unique event that highlights local heritage and produce. <https://www.watercressfestival.org/>

The Overlord Show

Dates: 24–26 May 2025

Location: Denmead, near Winchester

One of the UK's premier military vehicle shows, featuring displays of historic military vehicles, reenactments, and trade stalls. The event commemorates military history and supports veteran charities. <https://www.overlordshow.co.uk/>

The Grange Festival

Dates: 4 June – 6 July 2025

Location: The Grange, Northington

Set in a stunning neo-classical estate, The Grange Festival offers a season of opera, jazz, and dance performances. The venue has a rich history, with the current festival established in 2017 to continue the tradition of summer performances that began in 1998. The festival has become a cornerstone of the UK's cultural calendar, attracting world-class artists and audiences. <https://thegrangefestival.co.uk/>

Winchester Cheese & Chilli Festival

Dates: 7–8 June 2025

Location: Winchester

A family-friendly event celebrating two of the nation's favourite foods. The festival features cheese and chilli tastings, cooking demonstrations, live music, and activities for children, offering a spicy twist to the traditional food festival. <https://cheeseandchillifestival.com/winchester/>

Southwick Revival

Dates: 7–8 June 2025

Location: Southwick

A 1940s-themed event commemorating the village's role during D-Day preparations. The festival features vintage vehicles, reenactments, music, and dance, offering a nostalgic glimpse into wartime Britain. <https://southwickrevival.co.uk/>

Retro Wheels and Rails Festival

Dates: 14–15 June 2025

Location: The Watercress Line (Mid Hants Railway)

A nostalgic journey through the decades, this festival transforms each station along the heritage railway into a celebration of a different era—from the 1940s to the 1970s. Attendees can enjoy vintage vehicles, period music, and themed activities, making it a family-friendly event that appeals to history enthusiasts and retro aficionados alike. <https://railway200.co.uk/activity/retro-wheels-and-rails/>

The Garden Festival

Dates: 21–29 June 2025

Location: Winchester

A celebration of gardening, sustainability, and outdoor living. The festival includes workshops, plant sales, garden tours, and expert talks, appealing to green-fingered enthusiasts and families alike. <https://garden-festival.co.uk/>

Bishop's Waltham Festival

Dates: 27–29 June 2025

Location: Bishop's Waltham

Founded in 1995, this festival has been presenting creative performances for 30 years. It features a diverse program, including children's plays, workshops, storytelling, stand-up comedy, poetry, and music concerts. The festival fosters community engagement and showcases local talent. <https://www.bwfestival.art/>

Winchester Beer & Cider Festival

Dates: 27–28 June 2025

Location: Winchester Student Union

Organized by the South Hampshire branch of the Campaign for Real Ale (CAMRA), this festival showcases up to 70 real ales, craft beers, ciders, and

perries. It's a celebration of traditional brewing and a highlight for beer enthusiasts. The festival also supports local charities, with previous events raising significant funds for causes such as Hampshire Search and Rescue. <https://winchesterbeerfestival.camra.org.uk/>

Hat Fair

Date: 5 July 2025

Location: Winchester City Centre

Established in 1974, Hat Fair is the UK's longest-running festival of outdoor arts. It began as a buskers' fair and has evolved into a vibrant celebration of street performance, featuring artists from around the world. The name derives from the tradition of performers collecting donations in hats.

<https://www.hatfair.co.uk/>

Foodies Festival

Dates: 18–20 July 2025

Location: Winchester

Part of a national series, the Foodies Festival features top chefs, artisan producers, street food, and live music. It's a gastronomic celebration that attracts food lovers and offers a platform for culinary talent. <https://foodiesfestival.com/events/winchester-2/>

Wickham Festival

Dates: 31 July – 3 August 2025

Location: Wickham

An award-winning four-day music and arts festival featuring a diverse lineup of artists. The festival prides itself on its family-friendly environment, community involvement, and support for local charities. <https://www.wickhamfestival.co.uk/>

Boomtown Fair

Dates: 6–10 August 2025

Location: Matterley Estate, near Winchester

An immersive music and arts festival known for its elaborate stage designs and storytelling. Boomtown combines a diverse musical lineup with theatrical performances, creating a unique festival experience that has grown significantly since its inception. <https://www.boomtownfair.co.uk/>

The Ibiza Orchestra Experience

Date: 29 August 2025

Location: North Walls Recreation Ground, Winchester

A unique musical event featuring a 26-piece orchestra performing iconic Ibiza dance anthems. Combining classical instrumentation with electronic music, it offers an immersive experience that bridges genres and generations. <https://www.ibizaorchestraexperience.co.uk/winchester>

Sausage and Cider Festival

Date: 30 August 2025

Location: River Park, Winchester

Part of a UK touring festival, this event offers over 30 cider flavours and 20 sausage varieties, accompanied by live music, tribute bands, and entertainment such as axe throwing. It's a lively celebration of food and drink culture. <https://www.sausageandciderfest.co.uk/winchester>

Mucky Weekender

Dates: 11–13 September 2025

Location: Winchester

Curated by DJ collective Dub Pistols, this boutique festival offers a mix of music genres, art installations, and immersive experiences. It's known for its intimate atmosphere and eclectic lineup. www.mucky-weekender.co.uk

Heritage Open Days

Dates: 12–21 September 2025

Location: Various locations across Winchester District

Part of a national initiative, Heritage Open Days offer free access to historic sites, buildings <https://www.winchesterheritageopendays.org/>

Taste of Wickham Festival

Date: 14 September 2025

Location: Wickham

A free, family-friendly event celebrating local food, drink, and crafts. The festival includes cooking demonstrations, live music, children's activities, and a showcase of local producers, fostering community spirit and supporting local businesses. www.tasteofwickham.com

Winchester Poetry Festival

Dates: 10–12 October 2025

Location: Various venues in Winchester

Established in 2013, the inaugural festival took place in September 2014. It brings together renowned poets and emerging voices for readings, workshops, and discussions. The festival has become a significant event in the UK's literary scene, promoting poetry's relevance and accessibility.

<https://www.winchesterpoetryfestival.org/>

Winchester Cathedral Christmas Market

Dates: 21 November – 22 December 2025

Location: Winchester Cathedral Grounds

Inspired by traditional German Christmas markets, this event features wooden chalets selling festive goods, an ice rink, and seasonal food and drink. It's a highlight of the city's winter calendar, attracting visitors nationwide. <https://www.visitwinchester.co.uk/events/event-winchester-cathedral-christmas-market-24>

6 STRATEGIC AND POLICY ENVIRONMENT

KEY FINDINGS

- ▶ **Policy Evolution and Continuity:** While some policies pre-date the new Labour government (elected summer 2024), there's an expectation that key frameworks, like the LVEP program, will continue. The new government, through the Culture Secretary, has explicitly stated the centrality of culture, heritage, and tourism to its growth mission.
- ▶ **Economic Growth as a Driver:** A dominant theme is the pursuit of economic growth, with tourism and cultural industries identified as significant contributors. This is evident in the new Industrial Strategy in which there is a focus on sectors with the greatest potential for growth.
- ▶ **Focus on Investment and Overcoming Barriers:** Strategies like the Industrial Strategy aim to stimulate investment and activity by tackling barriers to growth, creating a "pro-business environment," and devolving powers to local authorities.
- ▶ **Shift Towards Localized and Collaborative Approaches:** The creation of Local Visitor Economy Partnerships (LVEPs) following the de Bois review signifies a move towards stronger local leadership and more coordinated destination management. Collaboration between various entities (government, businesses, charities, local authorities, DMOs) is consistently emphasized.
- ▶ **Emphasis on Sustainability:** This is a recurring and strong theme across multiple documents. There's a clear ambition to embed sustainable practices in tourism development and operations.
- ▶ **Diversity, Inclusion, and Accessibility:** Arts Council England's strategy explicitly addresses socio-economic and geographic variances in cultural engagement, unequal opportunities for young people, and lack of diversity. Historic England also focuses on ensuring heritage is valued and shared by everyone. VisitBritain increasingly seeks to ensure that inclusive and accessibility are central to destination planning.
- ▶ **Infrastructure and Connectivity:** The Hampshire Local Transport Plan highlights the importance of a carbon-neutral, resilient, and inclusive transport system that supports economic growth and quality of life. There's a recognized need to improve transport options for visitors, including public transport and active travel.
- ▶ **Impact of the visitor economy:** Tourism, culture and heritage play a strong role across policy areas; delivering economic, wellbeing and quality of life benefits to communities, contributing to a sense of place and playing a role in increasing the attractiveness of places to visit, live and invest.

NATIONAL CONTEXT

This policy review reflects existing the existing policy framework at time of writing. Some of these have been prepared following the election of a new Labour government in summer 2024 and others pre-date that.

It is noted that in her maiden speech as Culture Secretary, in July 2024, Lisa Nandy indicated that culture, heritage and tourism are central to the government's growth mission and that the new government, through partnerships with business, charity and local authorities, would seek to boost these sectors to increase their contribution to economic growth. We would expect the new national programme of tourism support, via the LVEP framework, to continue.

The Uks Modern Industrial Strategy

Published in June 2025, the Government's new industrial strategy is a pledge for change and dynamism in supporting industrial and economic growth. The strategy recognises the unpredictable economic environment which has faced the UK domestically and internationally. It advocates for a focus on 8 key sectors for growth (IS-8) which it believes offer the greatest potential for the UK economy.

Tourism, as a sector, doesn't feature specifically in the strategy except as a passing reference as a sector which will benefit from the broader policies the government is proposing. The strategy has four priorities each of which have specific actions. They are:

1. Making it easier to do business:
 - ▶ Tackle high energy costs
 - ▶ Promote free and fair trade
 - ▶ Strengthen our economic security
 - ▶ Expand access to finance
 - ▶ Drive innovation (with £86bn of R&D investment)
 - ▶ Capitalise on the value of UK data



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- ▶ Enhance skills and increase access to talent
 - ▶ Reduce regulatory burdens and speed innovation
 - ▶ Remove planning barriers
 - ▶ Ensure the tax system supports growth
2. Growth in cities and regions where IS-8 sectors are clustered
 - ▶ Proactively bring forward investable sites in the UK:
 - ▶ Strengthen local business environments across the UK
 - ▶ Renew the partnerships in Scotland, Wales and Northern Ireland
 - ▶ Support mayors and local authorities in England
 - ▶ Strengthen connections between and within our city regions and clusters
 3. Transform highest potential sectors:
 - ▶ £4.3bn for advanced manufacturing
 - ▶ £150m for creative industries
 - ▶ £600m for life science
 - ▶ Clean energy
 - ▶ £1.2bn for digital and technology
 - ▶ £150m for professional and business services
 - ▶ Financial services
 - ▶ Foundational industries and supply chains
 4. Partnership between business and a stronger, more capable and more agile state

- ▶ Attract private capital and build partnerships
- ▶ Use government's procurement power
- ▶ Make it easier for industry to navigate government
- ▶ Support small and medium sized business
- ▶ Establish strong institutions to focus on the Industrial Strategy
- ▶ Continuously monitor and evaluate the effectiveness of interventions

Invest 2035: The UK's Modern Industrial Strategy, UK Government (Green Paper)

As a Green paper the intention was that there would be a final Industrial Strategy by spring 2025 but this has not yet been produced. Having said the recent spending review by the UK Chancellor has indicated where spending priorities will be.

The Strategy will focus on tackling barriers to growth in the highest potential growth-driving sectors and places, creating the right conditions for increased investment, high-quality jobs and ensuring tangible impact in communities right across the UK. The Strategy's goal is to capture a greater share of internationally mobile investment in strategic sectors and spur domestic businesses to boost their investment and scale up their growth – an essential step in achieving, sustainable, inclusive and resilient growth

To maximise its impact on growth, the Industrial Strategy will focus on stimulating investment and activity in sectors with the highest growth potential. Those sectors are:

- | | | |
|---------------------------|----------------------------|--------------------------------------|
| ▶ Advanced Manufacturing | ▶ Defence | ▶ Life Sciences |
| ▶ Clean Energy Industries | ▶ Digital and Technologies | ▶ Professional and Business Services |
| ▶ Creative Industries | ▶ Financial Services | |



The strategy aims to strengthen what it refers to as a 'pro business environment' by bringing forward coordinated sector-specific and cross-cutting

policies that support businesses to overcome barriers and invest. By considering and listening to businesses and experts, the Government can identify the most effective levers for our sectors and geographical clusters across the country. These policy areas include people and skills, innovation, energy and infrastructure, the regulatory environment, crowding in investment, and international partnerships and trade.

A core objective of the Industrial Strategy is unleashing the full potential of our cities and regions. The Industrial Strategy will concentrate efforts on places with the greatest potential for our growth sectors: city regions, high-potential clusters, and strategic industrial sites. The Government is committed to devolving significant powers to Mayoral Combined Authorities across England, giving them the tools they need to grow their sectoral clusters and improve the local business environment through ambitious Local Growth Plans. Partnership with devolved governments will make this a UK-wide effort and support the considerable sectoral strengths of Scotland, Wales, and Northern Ireland.

The most significant short term impact for Winchester will result from the outcomes of the devolution proposals for Hampshire and the Solent which will impact the nature of local government and how services will be delivered. Clarity regarding the Industrial Strategy will emerge following the Chancellor's spending review (due June 2025).

Tourism Recovery Plan, Department for Culture, Media and Sport (DCMS)

Though delivered under the previous government in June 2021, the UK government published its Tourism Recovery Plan in recognition of the impact of Covid-19 and the value of tourism to the economy. The Plan, which superseded the Tourism Sector Deal, set out the national programme to support a growing, dynamic, sustainable and world-leading economy. The plan outlined six objectives:

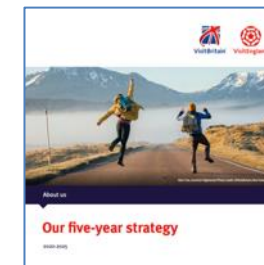


1. **To swiftly recover to pre-pandemic levels of domestic and international visitor volume** (recover overnight domestic volume and spend to 2019 levels by the end of 2022; inbound visitor numbers and spend by the end of 2023)
2. **To ensure that tourism benefits every nation and region** (longer visits; increased accommodation occupancy rates in the off-season; and high levels of investment in tourism products and transport infrastructure)
3. **To build back better with a more productive, innovative and resilient tourism industry** (maximising the potential for technology and data to enhance the visitor experience; and employing more UK nationals in year-round quality jobs)
4. **To ensure the tourism industry contributes to the enhancement and conservation of the country's cultural, natural and historic heritage and minimises damage to the environment**
5. **To ensure the tourism industry provides an accessible and inclusive offer that is open to all** (by aiming for the UK to be the most accessible tourism destination in Europe by 2025)
6. **To make the UK a leading European nation for hosting business events**

- However, international visitor numbers and spending remain below 2019 levels. The Government's aim is now to recover 2019 levels of inbound visitors and spend by the end of 2024.
- The government is taking steps to support regional tourism by taking forward the de Bois Review of Destination Management Organisations (DMOs), with the aim of supporting regional areas to better attract and manage tourists.
- ▶ New funding programmes have been introduced, including the £4.8bn Levelling Up Fund (LUF) and the £2.6bn UK Shared Prosperity Fund (UKSPF), which are designed to support local investment including interventions to support the visitor economy. The £110m Rural England Prosperity Fund is intended to complement the UKSPF and support capital projects in rural communities, including investment in visitor accommodation.
- ▶ In April 2023 DCMS published a consultation for a Tourism Accommodation Registration Scheme in England to increase the effective use of data on short-term lets. It is anticipated that the register would be operational from 2024 via an amendment to the Levelling Up and Regeneration Bill (LURB) to provide local authorities with data on how premises are being let out in their area and inform local approaches to managing the housing market.
- ▶ In parallel, the Department of Levelling Up, Communities and Housing (DLUCH) has published a consultation on proposed planning changes to use classes and permitted development rights for short-term lets.
- ▶ Skills and labour: the government is investing £25bn in the National Skills Fund until 2025 to help people gain skills, including in the hospitality sector.
- ▶ The Government, VisitBritain and the Tourism Industry Council will develop a Sustainable Tourism Plan in 2024.
- ▶ The Jet Zero Council (a partnership between the Government, industry and academia) will continue to test, develop and implement solutions to achieve net zero aviation by 2050.
- ▶ The Government's focus is on developing existing best practice approaches and toolkits such as the National Accessible Scheme (NAS), as well as research to discover how people's access to tourism is currently limited by their protected characteristics.
- ▶ A strategy for sustainable business events will be produced in line with broader Sustainable Tourism Plan and work with industry will continue to ensure the business events sector is fit for the future by identifying gaps in capacity and skills and potential improvements to accessibility.

VisitBritain/VisitEngland Strategy

Even before COVID-19 hit, the **VisitBritain/VisitEngland** strategy was predicated on increased dispersal of tourism benefits to the countries and regions, alongside overall growth and increased productivity. The Visit Britain/Visit England Strategy 2020-2025 (now removed from their website) set out how it will support the delivery of the Tourism Sector Deal, which will be achieved by:



Growing value - Through stepping up domestic marketing activity, to address the balance of trade deficit and encourage more people to holiday at home. Brining a focus on younger customers (aged 18-34), whose domestic tourism activity is in decline, and families, who are both essential for the long-term growth of the industry. Through developing customer segments for the domestic market, to ensure they can reach the right customers with the right content. Through delivery of the Tourism Sector Deal, to support Government's ambition to make the UK the most accessible destination in Europe.

Driving the dispersal of tourism value across Britain - Working in partnership with Destination Management Organisations (DMOs) to grow visits and value of our leisure and business travel across England. This will be supported by the development of regional product that addresses domestic and international market gaps and address product gaps through the distribution platform Tourism Exchange Great Britain (TXGB). The building of partnerships and expertise in route development to grow connectivity to regional England. Through work on the delivery of the Tourism Sector Deal they will identify new Tourism Zones, supported by central Government, and a biddable funding process, to drive visitor numbers across the country, extend the season and to tackle local barriers to tourism growth.

Supporting productivity optimisation - The priority will be to support the development of the England product, this will extend the season for an international and domestic audience and enable the distribution of this product in international markets building on the success of the Discover England Fund. By helping the industry build digital skills, we will ensure that product is researchable and bookable online. Our focus on winning business events for England will see us work closely with venues and locations and matching them with international opportunities, providing them with platforms to meet international buyers and supporting them through the bidding process.

Being the expert body on growing tourism - Ensure that VisitEngland is seen as a trusted partner in delivering on the Government agenda and provide and distribute statutory research, data and analysis that informs our own, industry and Government decision-making. Supporting and working together with DMOs and the wider England industry our assets, market plans and intelligence will be shared for national benefit.

Global Market Segments - Global segments, nuanced by markets, are:

- Experience Seekers – younger, free-spirited and spontaneous, they like holidays full of action and excitement
- Explorers – older, they enjoy the outdoors, sightseeing and embracing local culture at a more relaxed pace
- Culture-Buffs – image and brand-conscious, travel is seen as a status symbol; they like well-known safe destinations
- Free and Easy Mini-Breakers – similar to Experience Seekers, this younger domestic audience love the opportunity to take short breaks where they can either let loose or unwind

UK Domestic markets

Drive regional and seasonal dispersal increasing volume and value of short breaks in the shoulder season. Increase focus from one to two target audiences to address long term growth and short-term opportunity.

Overseas Markets

The most beneficial overseas market by some distance, and the market showing the most profitable growth, is the USA, followed by value growth from China. These are two of the most important markets followed by Australia, France, Germany, GCC, India and UK. Secondary markets for value include the rest of Europe, Canada, Brazil and South Korea. Lower growth (among core markets) is projected from Hong Kong, Japan, Russia and Austria. The 2023/24 VisitEngland Business Plan set out its intention to prepare a new Tourism Strategy for England. This work is ongoing and a new strategy is expected later in 2025.

A New Destination Structure in England - the Local Visitor Economy Partnership (LVEP) Programme

The implementation of a new tiering system of DMOs is an outcome of the De Bois review which found high levels of fragmentation across England which limited the potential of the visitor economy.

This review has led to the creation of a portfolio of nationally supported, strategic and high-performing Local Visitor Economy Partnerships (LVEP) to provide strong local leadership and governance in their destination. A new Hampshire, Portsmouth and Southampton Local Visitor Economy Partnership has just been launched. Tourism South East is the accountable body and Visit Winchester is represented on the management group of the new LVEP.



One of the first tasks for the LVEP is the creation of a new Destination Management Plan which is due to start being prepared in 2025. The Winchester Tourism Strategy can positively influence the wider LVEP DMP as it is being developed.

UKEVENTS (formerly Business Visits & Events Partnership)

In November 2022 the Business Visits & Events Partnership (BVEP) re-branded as UKEVENTS to ‘better reflect the diverse nature of the events sector which has grown to not only include meetings, conferences, exhibitions, and trade shows, but also incentive travel, event hospitality, ceremonies, sporting, cultural, outdoor and festivals’.

The re-brand follows the organisation’s launch of ‘[The UK Events Report](#)’ in early 2020 to showcase how it will deliver the Government’s Industrial Strategy. It illustrates the impact the UK events industry has on the economy - in 2019 business events generated more than £31bn of direct spend, with leisure events contributing a further £39bn. The report suggests that there is an opportunity to use both markets to showcase the UK’s abilities and resources, bring communities together and support post-Brexit and post-pandemic growth.



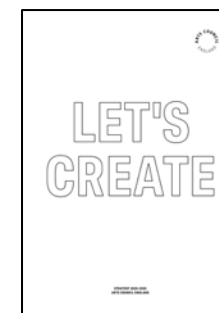
Moreover, recent research from the [UK Conferencing & Meetings Survey \(UKCAMS\)](#) suggests a strong recovery for the UK meetings sector. In 2022, there were 1.02m conferences and meetings in the UK, generating £16.3bn of direct spend compared with 0.2m events and £4.9bn of spend in 2020. 2022 spend levels are equivalent to 93% of 2019 levels. Recovery in the domestic market has proved to be particularly strong with more than 80% of venues saying that enquiries are the same or higher than 2019 levels. Capital investment by venues is also encouraging with more than 70% of those surveyed investing in facilities and new product development. However, the international market remains significantly below the pre-Covid peak with only a quarter of venues saying enquiries are the same or higher than 2019.

The latest [Business Events Delegate Spend Report](#) (May 2025) shows further recovery in spend by delegates attending UK business events with an average spend per trip of £629, up 37% in real terms on 2017 mainly as a result of more delegates staying overnight and a longer average duration (4.3 nights v 3.0 nights). Association events have an even greater average spend per trip (£854) and overseas association delegates spend £1354 on average.

Let's Create: Arts Council England

Arts Council England (ACE) published its 10 year strategy in 2020. It highlighted the following points in making the case for change:

- ▶ There are still widespread socio-economic and geographic variances in levels of engagement with publicly funded culture.
- ▶ The opportunities for children and young people to experience creativity and culture inside and outside school are not equal across the country.
- ▶ There remains a persistent and widespread lack of diversity across the creative industries and in publicly funded cultural organisations.
- ▶ The business models of publicly funded cultural organisations are often fragile and generally lack the flexibility to address emerging challenges and opportunities.
- ▶ Many creative practitioners and leaders of cultural organisations report a retreat from innovation, risk-taking and sustained talent development.



Their strategic vision is for England to be a country in which *'the creativity of each of us is valued and given the chance to flourish and where everyone has access to a remarkable range of high-quality cultural experiences'*, and three outcomes are identified as crucial to the delivery of the vision.

Arts Council England have identified where they will prioritise their support within three thematic areas:

Creative People - *'Everyone can develop and express creativity throughout their life'*.

- ▶ ACE will support communities to design and develop more opportunities for creative activity, particularly for children and young people.
- ▶ Where there are gaps in provision, ACE will support museums, libraries and arts organisations to use their collections, knowledge, skills and other assets to support community-led activities that are open to everyone.
- ▶ ACE will make the case for a stronger focus on teaching creativity and critical thinking across the curriculum and for a vital arts curriculum to be taught in schools.

Cultural Communities - *'Villages, towns and cities thrive through a collaborative approach to culture'*.

- ▶ ACE will work with a wider range of partners, including local government, to support communities to use creativity and culture to create thriving places to live, work, study and visit, aiming for a better balance of investment particularly in rural and isolated communities and support touring to those areas.
- ▶ ACE will support local cultural organisations, including libraries, museums, Music Education Hubs and arts organisations, to develop a better understanding of the needs and interests of their communities and will encourage cultural organisations to work in partnership with local education providers to plan, resource and deliver a joined-up cultural education programme that ensures every child in their area can access high-quality culture and realise their creative potential.

A Creative and Cultural Country - ‘England’s cultural sector is innovative, collaborative and international’.

- ▶ ACE will seek to encourage and develop a cultural sector that is outward-looking, innovative and globally connected, and that is committed to working with and learning from international talent and expertise.

Investment Principles have been identified as:

- ▶ **Ambition and Quality** - The strategy outlines ACE’s commitment to the pursuit of the highest quality in culture and art, whilst stating that it does not believe that certain types or scales of creative activity are inherently better or of greater value than others.
- ▶ **Dynamism** - ACE will expect cultural organisations, especially those in the National Portfolio, to invest in their workforces in order to develop the skills required to respond to a rapidly changing external environment, such as new technological opportunities and ongoing pressure on public funding and to become more entrepreneurial developing business models that increase financial resilience.
- ▶ **Environmental Responsibility** - ACE will expect the cultural organisations it supports to redouble their commitment to environmental responsibility.
- ▶ **Inclusivity and relevance** - ACE will ask organisations who receive regular investment to agree targets around protected characteristics and to demonstrate relevance to their communities.

Improving Heritage Improving Lives, Historic England

Historic England's strategy, published in 2021, has identified a vision to create "A heritage that is valued, celebrated and shared by everyone. A historic environment that people connect with and learn from and that we are proud to pass on to future generations."

It identifies three areas of focus:

- ▶ **Thriving places** - Collaborating with people and partners to secure vibrant and sustainable futures for historic places.
- ▶ **Connected communities** - Bringing communities together by discovering and celebrating local heritage, and by protecting the character of historic places.
- ▶ **Active participation** - Inspiring and equipping people to take action in support of the places they care about.



REGIONAL CONTEXT

Hampshire Strategic Plan

While principally a [strategic plan](#) for the County Council it sets out a number of over arching outcomes which reflect wider needs and opportunities and as such are relevant to Winchester.

The four outcomes are:

- ▶ Hampshire maintains strong and resilient economic growth and prosperity
- ▶ People in Hampshire live safe, healthy and independent lives
- ▶ People in Hampshire enjoy a rich and diverse environment
- ▶ People in Hampshire enjoy being part of strong, inclusive, resilient communities.

While it is possible to see how a thriving visitor economy can help across all of these outcomes it is in the economic growth and prosperity outcome that there is the greatest potential for tourism to help. A specific priority within this outcome is *maintaining and developing vibrant places across Hampshire that offer people thriving communities in which to work, visit, live and do business*.



Hampshire LVEP Business Case

Winchester district is part of a newly formed Hampshire, Portsmouth and Southampton Local Visitor Economy Partnership (LVEP), which received accreditation by VisitEngland in May 2025. The LVEP is administered through Tourism South East.

The Business Case for the LVEP as reported to the Hampshire Prosperity Partnership set out the following objectives:

- ▶ Enhance Visitor Experience: Develop and implement strategies to improve the quality of visitor experiences in Hampshire.
- ▶ Promote Local Attractions: Increase the visibility and attractiveness of local tourist destinations.
- ▶ Support Local Businesses: Provide support and resources to local businesses in the tourism sector.
- ▶ Sustainable Tourism: Promote sustainable tourism practices to preserve Hampshire's natural and cultural heritage.

The priority for year one is to create a Destination Management Plan for the LVEP area. It is therefore important for the Winchester Tourism Strategy to align and positively influence the development of that DMP. The evidence collected through this process will support that ambition.

Hampshire Cultural Trust

As the heritage and cultural trust established to operate the county council's and Winchester City Council's assets, the trust currently runs a large number of cultural and heritage venues across the county and in Winchester. Winchester venues operated by the trust include 878AD, Winchester City Museum, City Space, The Arc, The Gallery and The Great Hall with Westgate Museum.

Published in 2024, the HCT 2030 'A Strategy for Growth', sets out a sustainable model for developing culture and heritage across Hampshire. The Trust's vision is *for everyone to have access to inspirational cultural experiences that enrich and transform lives*.

The 2030 ambition has a number of underlying foundations which relate to the visitor economy as follows:

- ▶ All About Place: Helping to shape the places and drawing in visitors
- ▶ Strength in Diversity: Widening participation, inclusiveness and accessibility
- ▶ Leadership Through Collaboration: playing a strategic role and advocate for culture and heritage
- ▶ One Million Customers: A great offer and customer service, effective promotion and publicity
- ▶ Proudly Commercial: for re-investment into the offer and access

The strategy also sets out priority areas of focus around children and young people, the collections, people and climate change.

As a significant provider of cultural and heritage experiences in Winchester, the focus of the Trust and its priorities are important in supporting a vibrant visitor economy.



Hampshire Local Transport Plan

The Local Transport Plan (LTP4) sets out a vision for 2050 with outcome sand guiding principles to drive investment. The vision is “A carbon neutral, resilient and inclusive transport system designed around - and with - people, which: supports health, wellbeing and quality of life for all; supports a connected economy and creates successful and prosperous places; and respects and seeks to enhance Hampshire’s unique natural and built environment.”

The outcomes and accompanying themes are:

A carbon neutral, resilient Hampshire:

- ▶ Reduce transport related carbon emissions to net zero (neutrality) by 2050.
- ▶ A transport network that is resilient to climate change, extreme weather, incidents and major disruptive events.
- ▶ Respect and protect Hampshire’s environment
- ▶ Improved air quality and less noise disturbance from transport
- ▶ A transport network that protects and enhances our natural and historic environments, resulting in an overall net environmental gain.

Thriving and prosperous places:

- ▶ Supporting a connected economy, creating successful places and ensuring Hampshire continues to prosper whilst reducing its emissions.
- ▶ Support sustainable housing and employment growth and regeneration that positively supports our LTP4 vision.

Healthy, happy, inclusive lives:

- ▶ A network that supports and enables active travel and active lifestyles to improve our health and wellbeing.
- ▶ A transport system that provides more equitable access to services, opportunities and life chances delivering improved quality of life for all in Hampshire.



These are backed up by two guiding principles:

- ▶ Give people a choice of high quality travel options
- ▶ Provide a transport system that promotes high quality, prosperous places and puts people first

Tourism and the visitor economy is mentioned in the document on a few occasions and mainly in relation to the provision of bus services which meet the needs of visitors including with the provision of space for the carriage of bicycles.

It is clear however that the transport challenges and opportunities facing Hampshire are as relevant for their visitors as they are for residents. The main exceptions are perhaps with regard rail where the needs of visitors need to be considered alongside commuters and residents in order to switch arriving visitors from private car to public transport. Indeed in a post-pandemic environment, operators are increasingly seeing leisure users as an important source of income. Similarly investment in cycling and walking infrastructure has been shown in other regions to be a visitor experience in its own right as well as a way of supporting modal shift. The development of Irish Greenways and Blueways is a case in point.

South Downs National Park Partnership Management Plan 2020-2025

This plan sits within the framework of National Park Purposes:

- ▶ To conserve and enhance the natural beauty, wildlife and cultural heritage of the area.
- ▶ To promote opportunities for the understanding and enjoyment of the special qualities of the National Park by the public.
- ▶ To seek to foster the social and economic wellbeing of the local communities within the National Park in pursuit of our purposes.



The plan vision is for 'Thriving communities in inspirational landscapes'. The plan sets out the following outcomes:

- | | | |
|--------------------------------|---------------------------|------------------------|
| ▶ Landscape and natural beauty | ▶ Outstanding experiences | ▶ Creating custodians |
| ▶ Increasing resilience | ▶ Lifelong learning | ▶ Great places to live |

- ▶ Habitats and species
- ▶ Arts and heritage
- ▶ Health & wellbeing
- ▶ Great places to work

The plan recognises that Tourism and the visitor economy will change and it sets out a shared vision for how the National Park and its place brand, is central to sustainable tourism and the visitor economy, encouraging people to stay longer, do more and spend locally. The ambition is for the park to be an exemplar in sustainable tourism.

Specific policies included in the plan and which relate to the visitor economy are:

- ▶ POLICY 43: Support the development and maintenance of appropriate recreation and tourism facilities and visitor hubs, in and around the National Park, including a mix of quality accommodation, which responds to market demands and supports a sustainable visitor economy.
- ▶ POLICY 44: Encourage and support tourism providers to develop sustainable business practices and increase knowledge about the National Park's special qualities to provide a distinctive and high-quality visitor experience.

Implications for the visitor economy in Winchester are mainly around the drive to embed and strengthen sustainable tourism practices in existing and any new tourism investment.

The plan is currently being revised and is due to be completed by the end of 2025. The new plan has 7 emerging aims under two headings:

Climate and Nature

- ▶ Aim 1: The National Park is a nature-rich, resilient working landscape where wildlife flourishes
- ▶ Aim 2: The South Downs National Park is on track to become net zero by 2045 by mitigating and adapting to the impacts of climate change
- ▶ Aim 3: Clean, abundant water supports nature and communities in the South Downs and beyond

People and Place

- ▶ Aim 4: Young people will have opportunities to access training and skills to enable them to take action to care for and enhance the National Park
- ▶ Aim 5: A valued South Downs is welcoming and accessible to all
- ▶ Aim 6: Cultural Heritage is conserved, enjoyed, valued, created and passed on for future generations

- ▶ Aim 7: A thriving rural economy and local communities sit at the heart of the National Park

Specifically within aim 7 are objectives and targets which underpin tourism development:

Objective 7.1: To support the growth of a greener economy across the National Park while providing outstanding visitor experiences that benefit our communities and landscape

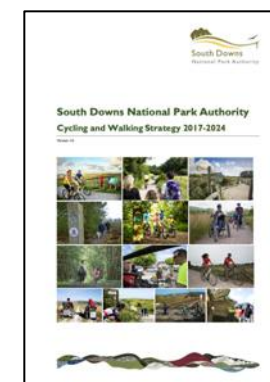
- ▶ Target 7.1a: 5% Growth in Green Economy by 2031 from 2024 baseline
- ▶ Target 7.1b: Support Local Visitor Economy Partnerships (LVEPs) to achieve Tourism GVA growth by increasing Tourism £GVA within the SDNP by 25% by 2030 from 2024 baseline
- ▶ Target 7.1c: Visitor experience: 99% of visitors to rate their enjoyment of the National Park as “high” or “very high”
- ▶ Target 7.1d: Income from visitor giving to increase by 100% by 2031
- ▶ Target 7.1e: Promote and connect sustainable business through growing the Our South Downs business network to over 700 members by 2031
- ▶ Target 7.1f: 50% increase in the number of B Corp. within the SDNP from 2024 baseline

South Downs National Park Cycling & Walking Strategy 2017-2024

The ambition for Cycling and Walking in the SDNP is:

- ▶ The National Park is home to a network of largely traffic free routes providing opportunities for a range of users of differing abilities and ages, who are using the network for recreation and daily utility journeys.
- ▶ The network is easily reached from all communities within and near to the National Park and is well connected to public transport.
- ▶ Visitors and residents enjoy excellent cycling and walking recreational facilities and information throughout the National Park on trails, at visitor attractions, amenities and accommodation providers.

The strategy sets out two key outcomes:



- ▶ A network of high quality cycling and walking routes, across the South Downs that connect communities within and near the National Park with the landscape, heritage, attractions, transport hubs and gateways.
- ▶ A welcoming environment for cycling and walking activity, offering extensive high quality tourism, access experiences and facilities within the National Park.

These are supported by three themed objectives as follows.

1. Policy & Development Objectives:

- PD1 Ensure robust development policies are incorporated and delivered within the Local Plan and LPs of neighbouring authorities
- PD2 Protect and enhance access for NMUs within major highway schemes
- PD3 Ensure new developments connect users to the access network
- PD4 Protect railway level crossings providing access for NMUs and motorised users to or within the National Park and actively resist any proposed closures

2. Access Network Objectives:

- AN1 Raise awareness of the SDNPA C&W Strategy with all LHA partners, neighbouring authorities and major stakeholders
- AN2 Develop the network of NMU leisure paths along former railway alignments
- AN3 Add community led access schemes to SDNP Infrastructure Business Plan (IBP) list
- AN4 Improve the accessibility and quality of key leisure routes for NMUs
- AN5 Reduce severance, improve access and connectivity (for NMUs) to employment, green space and attractions
- AN6 Improve cross-town 'utility paths' and commuter routes for NMUs

3. Economic & Social Objectives

- ES1 Increase the volume, range and quality of access information and visitor itineraries
- ES2 Develop a SDNP tourism offering and promotion of the National Park as a cycling and walking activity destination
- ES3 Support businesses, organisations and communities to increase cycling and walking facilities, services and user experience
- ES4 Encourage increased cycle hire provision (inc E-bikes) at transport hubs, gateways and market towns
- ES5 Promote the National Park as a healthy, outdoor, recreation facility
- ES6 Support the improvement of public transport services and facilities into and within the National Park

With very obvious ambitions for the National Park to be an exemplar sustainable destination with extensive cycling and walking experiences, Winchester should look to align to this with policy and development which supports the growth in active tourism.

South Downs National Park Sustainable Tourism Strategy 2015-2020

The strategy is evidently out of date but we are reviewing here as many ambitions and priorities are likely to remain in any subsequent plan that is developed.

The objectives in the strategy are to:

- ▶ Improve visitor experience & 'Sense of Identity'
- ▶ Diversify the Tourism 'Offer'
- ▶ Share the benefits of tourism more widely
- ▶ Embed sustainability best practice
- ▶ Inform travel behaviours
- ▶ Develop greater custodianship of the National Park
- ▶ Increase visitor spend

The strategy contains what are referred to as three delivery tools of tourism, which set out how they will work in partnership. These are:

- ▶ Enabling sustainable travel
- ▶ Encouraging business development
- ▶ Knowledge/custodianship

It also has four themes which reflect visitor facing approaches with a particular focus on promotion. They are:



- ▶ Adventure Land - A theme aimed at being active in the great outdoors; exploring the National Park widely and taking part in adventure based activities.
- ▶ Cultural Land – A theme that celebrates the cultural contribution of the National Park to English Culture through literature, art, folklore, music and key historical characters and landscapes
- ▶ Natural Land – A theme that proudly celebrates the natural beauty and wildlife of the National Park and advises why this is a special place.
- ▶ Working Land - A theme that focuses on the busy working landscape of the South Downs through farming practices, food/drink and traditional rural skills and crafts.

The strategy identifies some priorities that relate to Winchester: *Winchester: Although mainly outside the National Park boundary, Winchester is a key gateway to the South Downs from the west with Winchester City Mill as the main SDNP visitor focus. The City is a sustainable transport hub and there is a need to improve links and signage from stations to both the South Downs Way and the National Park generally. Winchester provides a significant offer on local food and drink experiences which should be further exploited.*

Enterprise M3 – Strategic Economic Plan; Skills Report; & Industrial Strategy 2030

Though the Hampshire Prosperity Partnership has replaced the former LEP Enterprise M3, some of the reports and strategies contain useful and relevant insights that it is worth noting as part of this review. In common with many LEPs, the focus of strategies is on high growth sectors and priorities. As such tourism and the visitor economy gets little mention in the strategy though there is recognition that a well-functioning sustainable transport network would help tourism thrive.

Priorities in the Industrial Strategy make little direct reference to tourism and the visitor economy. They are however ‘foundational’ priorities which are important to all sectors of the economy and include a focus on:



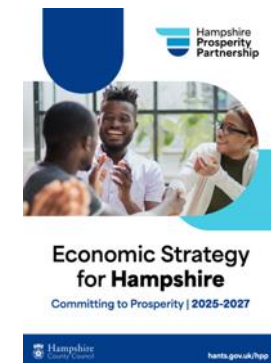
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| ▶ Science, innovation and enterprise | ▶ Housing | ▶ A step change in digital connectivity |
| ▶ People and skills | ▶ A gateway region | ▶ Smart mobility |
| ▶ Towns | ▶ Clean growth | ▶ Exporting |

The skills report highlights that the region has a highly educated and qualified workforce with low levels of unemployment. This can often create challenges for the tourism sector with high levels of vacancies.

Hampshire Prosperity Partnership – Economic Strategy; and Draft Economy & Growth Plan

At a recent (May 25) meeting of the Hampshire Prosperity Partnership Board, a draft Economy and Growth plan was shared, setting out the actions to take forward the Economic Strategy for Hampshire 'Committing to Prosperity 2025-27'. Tourism is one of 12 priority sectors identified as important to the Hampshire economy. The plan has five areas of focus which contain a number of actions. The five areas of focus are:

- ▶ High potential sectors and clusters
- ▶ Business support
- ▶ Energy
- ▶ Infrastructure
- ▶ Skills, employment and careers



LOCAL CONTEXT

Winchester Ten Year Green Economic Development Plan (and Action Plan)

The strategy sets out how to continue economic growth while reducing net carbon emissions.

The strategy uses a scenario planning approach to think about the sorts of changes that Winchester could pursue in the 2020's. The outcomes across these scenarios include:

- ▶ Increased business density and diversity
- ▶ Higher skills and productivity
- ▶ Reduced socio-economic and spatial inequality
- ▶ More affordable, sustainable, and flexible housing stock
- ▶ Net CO2 emissions reduced to zero
- ▶ Greener transport and less congestion
- ▶ More local renewable energy
- ▶ Increased biodiversity and green infrastructure

To deliver these outcomes, the strategy proposes six priority themes and a number of actions. The themes and key actions are:

- ▶ Innovative business and economy: Collaborate to extend the EM3 LEP digital spine
- ▶ Skills and competitiveness: Co-ordinate development of a low carbon offsite and Sustainable Construction Skills Academy
- ▶ Culture, creative and visitor economy: Collaborate with the district's educational institutions to grow opportunities for the creative and cultural sector
- ▶ Connected, public, and electric transport: Deliver a plan for the next phase of the EV charging infrastructure strategy
- ▶ Affordable, low carbon housing: Encourage low or zero carbon regeneration site testbed and development
- ▶ Green infrastructure, biodiversity, and renewable energy: Deliver green infrastructure and ecosystem services in built-up areas



The culture, creative and visitor economy priority proposes an approach that see Winchester concentrating on a more independent-led, experiential retail and leisure experience using local suppliers and local and regional branding across multiple market town cores as well as in the historic city centre, there is an opportunity to enhance the visitor offer and grow the Winchester District brand as the preferred sustainable visitor gateway to the South Downs.

The strategy suggests there is an opportunity for Winchester District to make more of its key assets such as its city centre heritage, the South Downs National Park, and the numerous visitor destinations across the district. This can be done by marketing itself as the number one sustainable tourism destination in the UK, with a single brand covering attractions, accommodation, transport, and hospitality. An existing population of dynamic local suppliers offers a ready market of collaborative partners to establish a district-wide 'buy local' sustainable tourism brand. Winchester is the most important gateway to the South Downs and has an opportunity to cohere a network of rural visitor attractions around a common identity. Hospitality businesses participating in either sourcing local food or supplying waste to local compost facilities can be part of a “grown in Winchester district” initiative, helping to raise their profile and that of the whole programme.

It also proposes working further to decarbonise tourist travel between accommodation, destinations, and town centres across the district and National Park should be a feature of the brand through a combination of electric vehicle charging at tourist hotspots, dedicated active travel links, and effective low carbon public transport.

Winchester District Cultural Strategy 2024-2030 and Evidence Base

The vision is ‘Winchester district’s creative dynamism enriches lives and makes amazing things happen’. The work is founded in some core values:

- ▶ Inclusive: The strategy will mean multiple things to multiple people and will aim to offer something for everyone.
- ▶ Collaborative: Partners across multiple sectors will work together on shared goals.
- ▶ Ambitious: Specific and clear ambitions will be defined, including a realistic plan for how these will be achieved.
- ▶ Resilient: Actions will be focused on building resilience in the sector and partnership group, ensuring, in turn, a resilient strategy.
- ▶ Distinctive: The strategy will be distinctively Winchester.



The strategy has five priorities and three underpinning themes. The priorities are:

- ▶ Education & young people: By 2030, we will have established a youth-led movement designed to encourage a growing number of young people who are discovering and engaging in a wide range of cultural activities. The movement, supported by multiple partners, will be an accessible, inclusive, diverse and safe space which celebrates young people and embraces their creative talent.
- ▶ Placemaking: By 2030, Winchester will have harnessed its collective power and influence to bring about change, showcasing and connecting communities to our diverse cultural and creative offer. The sector will be attracting external investment and culture will be considered central to Winchester's identity. This will begin the process of putting culture on the growth and regeneration map.
- ▶ Economy & creative industries: By 2030, Winchester district will celebrate its vibrant, accessible creative sector. Through collaboration, we are devising creative and innovative solutions to challenges and maximising opportunities. We have created a network of spaces and skills to support sustainable career opportunities and demonstrate economic benefit.
- ▶ Events & festivals: By 2030, through working in collaboration and partnership, Winchester district will have a growing number of festivals and events, covering a wide range of themes and topics, attracting new and existing audiences, prioritising inclusion and accessibility. Maintaining the quality Winchester district is known for, experiences which are inspiring, experimental, risk-taking and fun, which attract funding and deliver strategic creative aims, will be happening.
- ▶ Partnership working: By 2030, we will have the mechanisms and structures to collaborate effectively. Together we will have demonstrated influence and power through increased sustainability, additional funding and support and will be allowing space for creative risk-taking and innovative thinking. Alongside our existing audiences will see new, more diverse audiences and workforce and will be supporting additional outcomes in areas such as health, wellbeing and environment.

The three themes are:

- ▶ Inclusion & diversity: By 2030, a greater proportion of the cultural and creative workforce and audiences will be from a diverse background and programming will more accurately reflect the local population. We must actively pursue opportunities to engage people from all backgrounds to consume, engage, participate, lead, produce and have careers in culture. We should aim to empower communities to express, share and celebrate their cultural identity and heritage.

- ▶ Environmental responsibility: By 2030, environmental responsibility will automatically be considered by partners when developing projects, it will be a first thought opposed to an afterthought. We will communicate to our audiences our stance on environmental responsibility, explaining what we are doing and why. Culture will be used as tool to engage audiences in conversations about sustainable action and to develop innovative solutions.
- ▶ Health & wellbeing: By 2030, culture and creativity will have made a demonstrable difference to the health and wellbeing of Winchester district's residents. We seek to champion and explore the fundamental role that culture plays in health and wellbeing throughout the delivery and implementation of this strategy.

Winchester Movement Strategy

This policy document mainly concerns movement within the city of Winchester. The vision in the strategy is “To support strong and sustainable economic growth for the city of Winchester whilst at the same time enhancing it as a place and community where people can have an excellent quality of life.”

The strategy contains three priorities:

- ▶ Reduce city centre traffic
- ▶ Support healthier lifestyle choices
- ▶ Invest in infrastructure to support sustainable growth

While many of the concerns and issues highlighted in the strategy affect residents and businesses, they are also a matter for visitors. An appraisal of different options to take forward the strategy resulted in nine to progress:

- ▶ Park and Ride - increasing the capacity of Park and Ride
- ▶ Bus priority - introducing bus priority measures on key radial routes into the city centre
- ▶ Bus operator partnership - New bus partnership with bus operators across the city
- ▶ Traffic Demand Management (TDM) study
- ▶ Walking and Cycling: City centre walking/ cycling facilities, including access to key destinations (rail station, leisure centre). Worthy Lane pedestrian access



- ▶ Enhancing public realm in the city centre: Public Realm Masterplan
- ▶ Deliveries - better management of deliveries of goods to the city centre
- ▶ Integrated planning - an integrated approach to transport planning and land-use planning
- ▶ Enhancing strategic road network capacity – M3

Winchester District Local Plan 2020-2040 (emerging)

The emerging local plan is currently at the 'examination' stage and is scheduled to be adopted towards the end of 2025. It is however clear from the evidence and emerging drafts what the vision, objective and priorities are.

The vision acknowledges the challenges of climate change and the need to adapt and mitigate against this while conserving the cultural heritage and natural beauty of the area.

The spatial objectives in the strategy are:

- ▶ Tackling the climate and nature emergencies and creating a greener district
- ▶ Living well
- ▶ Homes for all
- ▶ Vibrant local economy

Beneath the headlines are a number of specific objectives which are more impactful for visitors and include:

- ▶ Protect and enhance green and blue spaces and the S Downs National Park
- ▶ Encourage sustainable and active travel
- ▶ Growing the tourism and visitor economy
- ▶ Supporting the cultural, visitor and tourism economy, including links and access to destinations including Winchester City and the South Downs National Park.



The plan also makes the case for conversion and re-use of rural sites for visitor use and accommodation.

Winchester Local Cycling and Walking Infrastructure Plan (Consultation Draft)

The draft plan identified and audited 8 primary routes across the district and has developed recommended actions to improve these for walkers and cyclists. While the focus is largely on 'local' modal shift and therefore commuters and local resident needs, improvements to infrastructure will have a resulting benefit in improving facilities for visitors.



Visit Winchester DMP 2015-2020 (and Action Plan)

The DMP has a stated vision: 'To increase the contribution visitors make to the prosperity and social and environmental wellbeing of Winchester and the Hampshire area of the South Downs National Park.'

The outcomes sought included:

- ▶ Increase the economic impact from tourism
- ▶ Raise the profile of the destination via PR
- ▶ Encourage staying visitors and increase the duration of stay
- ▶ Sensitively develop and enhance the visitor experience
- ▶ Strengthen partnership

These outcomes are reflected in aims which seek to strengthen partnerships, improve the visitor experience and improve the performance of the visitor economy. Specific actions under each of the aims are as follows:

Aim 1 - We will further the interests of the tourism industry locally by developing the destination

- ▶ Tap into national campaigns with the likes of VisitBritain
- ▶ Link into the LEPs
- ▶ Reposition to develop business tourism



- ▶ Work with the BID to improve traffic and movement
- ▶ Foster partnerships to benefit from cruise tourism

Aim 2 - We will drive results from our marketing and PR activities

- ▶ Promotions, PR and campaign development
- ▶ Develop online and customer facing channels
- ▶ Do an Economic Impact Assessment

Aim 3 - We are committed to enhancing quality, service and visitor experience

- ▶ Improve visitor welcome via the TIC
- ▶ Maximise potential from new tourism developments
- ▶ Support new hotel investment
- ▶ Promote low carbon practices
- ▶ Support event organisers to create memorable events
- ▶ Improve accessibility
- ▶ Showcase local food and drink

While this document is now quite old, many of the aims and objectives remain relevant to tourism in Winchester today. This includes the focus on low carbon impacts from tourism, accessibility and the potential from further development of accommodation, events and food and drink.

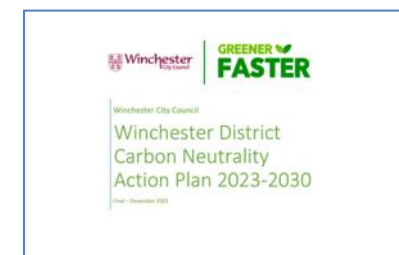
Winchester Climate Emergency and Winchester City Council Carbon Neutrality Action Plan

Winchester City Council declared a climate emergency in 2019 and made a commitment to become a carbon neutral authority by 2024 with a forecast 96% reduction in direct carbon emissions when final figures are reported later in 2025.

The action plan sets out five pathways:

- ▶ Reduce energy consumption
- ▶ Reduce transport carbon emissions
- ▶ Increase renewable energy generation / purchase
- ▶ Carbon sequestration through nature based solutions
- ▶ Support creation of local carbon credits

Within each of these are a number of specific actions many of which target changes within the control of the authority e.g. energy use in council premises, energy efficiency of social housing or the type of vehicles used by the authority. But many of the actions are also about influence and there is a role for the tourism and hospitality sector to support actions which will have a positive impact and which include the retrofitting of premises to make them more energy efficient; growth in EV charging infrastructure; purchase of renewable energy etc.



Central Winchester Regeneration & Station Approach

The vision for central Winchester regeneration is for a mixed use, sustainable, pedestrian friendly quarter. The project aims to create attractive public spaces while reflecting the distinctive character of the city.

The project has a lead development partner appointed and broad ambitions for the site are set out within a Supplementary Planning Document. The Council Cabinet has recently approved the Development Delivery Plan for the site. This includes an initial design and planning phase, followed by a procurement and construction phase. Throughout extensive community engagement is planned including meanwhile uses for the site to build familiarity and anticipation.



The anticipated timetable is from 2025-2034. The project is attempting to deliver a wide number of outcomes that address the city's challenges and opportunities and this includes creating a destination which can attract more visitors (including staying visitors) and improve dwell times in the city.

The Station Approach Project is at an earlier stage of planning. The project acknowledges that the station is an important gateway for visitors to the city and has over 8000 people passing through it every day.

Next steps are for a concept masterplan to be submitted to the council cabinet for approval.

7 ENGAGEMENT AND CONSULTATION FINDINGS

KEY FINDINGS

- ▶ **Winchester boasts strong assets** in its rich heritage and culture (Cathedral, events like Hat Fair), appealing natural environment near the South Downs, vibrant food and drink scene with local champions, and good accessibility from London.
- ▶ **Key challenges include a muddled identity**, a perception of being "stale," inadequate infrastructure (hotels, transport, parking), and a visitor experience that struggles with dwell time and wayfinding.
- ▶ **Stakeholders desire a unified and bolder marketing approach** to attract diverse audiences beyond the "cathedral set" and to better differentiate Winchester from competitors like Salisbury and York.
- ▶ **Opportunities for growth** lie in collaborative marketing, diversifying offerings with more seasonal events and varied attractions, focusing on themes like "foodie destination" or "wine capital," and leveraging upcoming regeneration projects.
- ▶ **Businesses primarily view heritage as Winchester's top tourism asset**, but also highlight the need for investment in accommodation, festivals, events, and a wider range of food and drink options to boost the visitor economy.
- ▶ **Residents seek a more vibrant, diverse, and accessible cultural scene**, calling for higher-quality performances, more varied live music venues, a purpose-built art gallery, and improved communication about events across the district.

CONSULTATION FINDINGS

As part of this study, Blue Sail held one-to-one consultations with 15 key stakeholders to discuss the destination, visitor markets, challenges and opportunities in greater detail. Organisations participating in one-to-ones included Winchester Cathedral, Winchester College, Marwell, The Science Centre, Hampshire Cultural Trust, The Hat Fair (Play to the Crowd), Winchester BID, Hampshire Fare, South Downs National Park, Lainston House, Wallops Wood, Long Barn, The Grange Wine and Vineyards of Hampshire.

Winchester faces opportunities and challenges in its visitor economy, with various stakeholders offering insights into its current state and future potential. A summary of the consultation findings is as follows:

Current Strengths:

- ▶ **Heritage and Culture:** Winchester is recognized for its rich history, including the Cathedral, The Great Hall, being the old capital of England, and its association with Jane Austen. Consultees also recognized that the city hosts numerous events and festivals, such as the Hat Fair and Christmas Market and has other strong cultural offerings including the Theatre Royal and the 878 AD immersive experience.
- ▶ **Natural Environment:** The city is appealing due to its countryside, proximity to the South Downs National Park, and green spaces, offering opportunities for walking, cycling, and enjoying nature.
- ▶ **Food and Drink:** Winchester has a vibrant restaurant scene with independent shops and a good food and drink offer. Hampshire Fare, a not-for-profit organization, champions local food and drink with 350 members across Hampshire and the Isle of Wight, with Winchester being their second-largest membership area. There's potential to promote the area as a "wine capital" due to active vineyards. Lainston House Hotel emphasizes food, aspiring to be Hampshire's first Michelin star restaurant.
- ▶ **Accessibility:** Winchester is accessible from London and has good road and rail links enabling visitors to reach the city relatively easily.
- ▶ **Key Visitors:** Consultation showed that visitor types vary by attraction. The Cathedral is reliant on admissions for a third of its budget, with 135,000 paying visitors annually. International visitors accounted for 55% of visitors in the last month, including student and cruise ship groups. The Winchester Science Centre primarily attracts day-trippers from a 30-90 minute drive time, mainly families with children under 12. Marwell Wildlife attracts roughly 500,000 annual visitors, including families and retirees. Common markets for Winchester across all experiences are 'families' and 'older couples'.

Challenges & Areas for Improvement:

- ▶ **Identity and Cohesion:** Winchester was seen as a place which "punches below its weight", lacks a clear identity, and is perceived as "stale and unadventurous" by some. There's a perceived lack of cohesion among cultural attractions and a perception of siloed decision-making.
- ▶ **Infrastructure:** Hotel infrastructure is seen as inadequate, lacking both budget and upmarket options, and transport around the city is difficult with a view that the parking fees are excessive. Public transport links (and active travel) to attractions outside the city centre, like Marwell and vineyards, are lacking.

- ▶ **Visitor Experience:** Some feel there isn't enough to do to extend dwell time. Wayfinding within the city to connect visitors to all of the attractions is seen as inadequate. The city can quickly reach saturation point during major events or when large numbers of shore excursions descend.
- ▶ **Marketing and Promotion:** The current marketing is perceived to speak more to a "cathedral set", and there's a need for bolder, braver messaging to attract different audiences. Stakeholders desire a clearer mechanism for collaborative marketing and a strong PR network.
- ▶ **Competition:** Winchester is seen as competing with nearby cities like Salisbury and York, and other areas like the New Forest. This competition requires Winchester to differentiate itself in the eyes of visitors.

Opportunities & Future Vision:

- ▶ **Collaborative Marketing:** Many stakeholders emphasize the need for a unified approach to marketing and a shared vision for Winchester. The LVEP (Local Visitor Economy Partnership) is seen as a potential vehicle for this.
- ▶ **Diversifying Offerings:** There's a desire for more seasonal events, temporary public art installations, and a greater selection of retail and family-friendly attractions. Leveraging events like light shows and expanding adult-oriented programs are seen as ways of attracting new markets.
- ▶ **Focus on Specific Themes:** Suggestions include promoting Winchester as a "foodie destination", a "wine capital", or a "green hub" embracing regenerative tourism. Connecting heritage with contemporary culture and exploring themes like the Viking story or Anglo-Saxon kings could also help.
- ▶ **Infrastructure Development:** Two significant regeneration projects, Station Approach and Central Winchester Regeneration, aim to improve mixed-use spaces, retail, hospitality, and pedestrian areas within the city center. There's also a recognized need for more accommodation options, including budget-friendly hotels and upmarket establishments.
- ▶ **Sustainability:** The South Downs National Park highlights the opportunity for Winchester to become known as a sustainable destination, focusing on decarbonization, offsetting visitor footprints, and improving sustainable transport options. Marwell Wildlife is also eco-conscious and interested in improving public transport links.
- ▶ **Leveraging Existing Assets:** The potential of Marwell Hall for heritage experiences and the Great Hall for increased visitors are highlighted. Universities are seen as an untapped resource for connecting creative talent with the city. Overall there was a view that the city already has great assets and joining them up for visitors to more easily experience is a key opportunity.

The overarching sentiment is that Winchester has immense potential due to its heritage, natural beauty, and food scene, but requires a more strategic, collaborative, and bold approach to marketing, infrastructure, and visitor experience to truly thrive as a destination. There is a strong desire for collaborative working and a recognition that the local authority cannot be expected to fix everything – but has an important role as “enabler” and “convenor”.

There's a perceived gap between consultation and action, with some stakeholders expressing fear that "too much talk, not enough action" hinders progress and that the city's character is at risk from larger commercial interests.

In summary, the overall sentiment is one of **cautious optimism** tempered by **frustration** over perceived inefficiencies, lack of strategic alignment, and underdeveloped infrastructure. Stakeholders are keen for a more unified, proactive, and innovative approach to unlock Winchester's full potential as a premier visitor destination.

BUSINESS SURVEY

During May/June 2025, Blue Sail ran a business survey as part of this study. Over 65 businesses responded to the survey which is a robust response when viewed alongside other strands of this work.

Businesses that took part in the survey represented a cross-section of the visitor economy and included accommodation providers, café, restaurant, pubs, attractions, culture and venues, leisure and entertainment, events, retail, guides, community organisations and attractions. Half of those responding are members of VisitWinchester while 15% were unsure if they were or weren't.

Winchester visitor offer

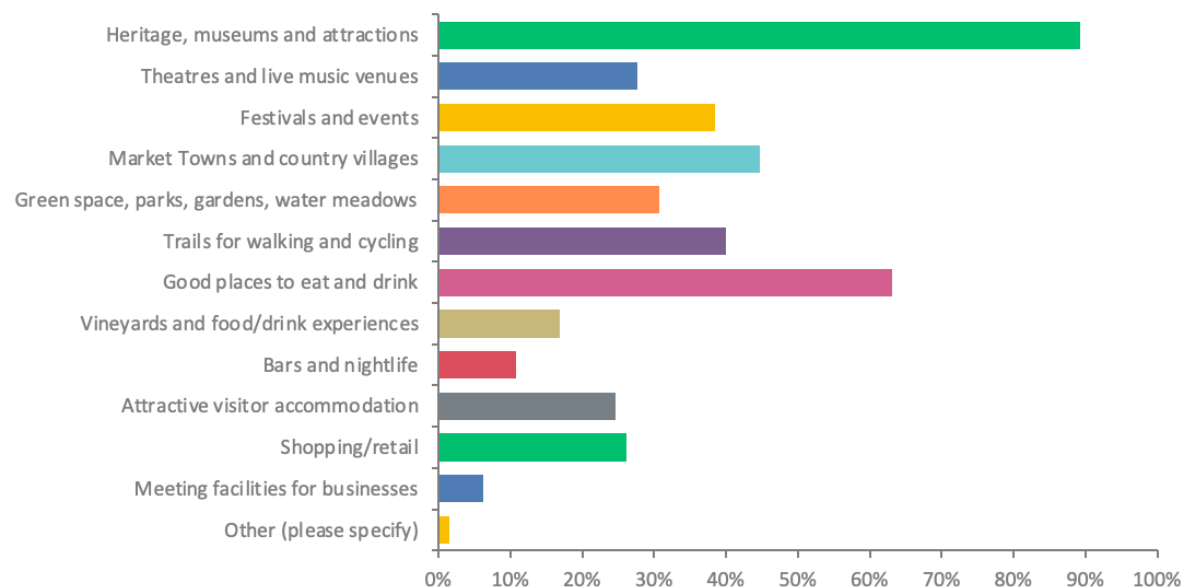
The survey asked what respondents thought were the districts best tourism assets currently.

By far the highest response with 89% selecting it was 'heritage, museums and attractions', followed by 'good places to eat and drink' (41% of respondents).

The 'market towns and country villages', 'trails for walking and cycling' and 'festivals and events' were all selected by between 25-30% of respondents.

At the lower end of responses were 'bars and nightlife' and 'meeting facilities for business'.

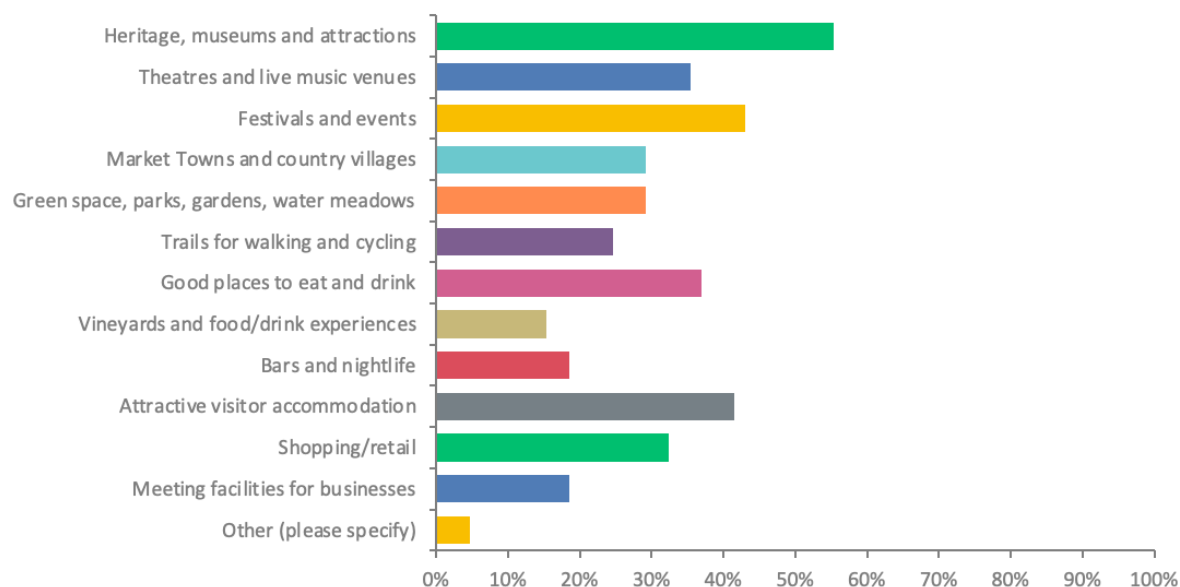
This reinforces the importance of heritage as a driver of visits.



Respondents were then asked which from that list should be the focus of future development and investment in order to attract visitors to Winchester.

Responses to this question were more balanced. While Heritage again came on top with 55% of responses there was felt to be a need to support and invest in accommodation, festivals & events, good places to eat & drink and theatres & live music with between ¼ and 1/3 of respondents selecting these aspects of the Winchester offer.

This appears to reflect a view that investment in a wider cross section of the visitor offer is needed for the destination to be more successful while investment in the strongest assets of 'heritage' should sustain the quality of that offer.



Respondents were asked to state in their own words how Winchester is viewed as a visitor destination. Findings are shown in the box below:

How would you say Winchester is viewed as a visitor destination?

Winchester is largely viewed as a historic and attractive city with a rich culture and heritage. Key attractions include its cathedral and other historical sites. Visitors often describe it as quaint, charming, beautiful, and steeped in history.

It is also recognized for its culinary scene, with many places to eat and drink, including independent establishments. The retail offerings are noted, particularly independent shops and higher-end women's clothing, though high street fashion is seen as lacking due to high rents.

While generally seen as a good visitor destination, some respondents suggest it is undersold and not promoted widely enough. There's a perception that it appeals more to a relaxed and slightly older demographic, with less awareness of its vibrant bar and restaurant scene among younger people, and fewer attractions specifically for children. Some also feel there aren't sufficient compelling reasons for certain types of cultural tourists beyond the cathedral.

Other aspects of Winchester's perception include being clean, safe, and walkable, with attractive surroundings and green spaces. Some comments also mention it as being pricey and upmarket. Accommodation options are noted as needing improvement, with some hotels being dated and a lack of boutique on-trend options, as well as family-friendly budget accommodation with parking. Better transport to the wider region is also suggested to encourage longer stays.

Target markets

The survey asked respondents to rank which broad markets they felt Winchester should target to increase tourism to the district over the next five years.

While this showed a small preference for overnight visitors, reflecting the nature of the respondents business', there was a relatively even spread of where the focus should be with day visitors being seen as the next most important group.

| | 1 | 2 | 3 | 4 | TOTAL | SCORE |
|---|--------------|--------------|--------------|--------------|-------|-------|
| Local residents - people living in the Winchester area | 10.00% 6 | 21.67% 13 | 11.67% 7 | 56.67% 34 | 60 | 1.85 |
| Day visitors - people living within two hours of travel, but outside Winchester | 30.00% 18 | 21.67% 13 | 41.67% 25 | 6.67% 4 | 60 | 2.75 |
| Overnight visitors from the UK | 40.00% 24 | 38.33% 23 | 18.33% 11 | 3.33% 2 | 60 | 3.15 |
| Overnight visitors from overseas | 20.00% 12 | 18.33% 11 | 28.33% 17 | 33.33% 20 | 60 | 2.25 |

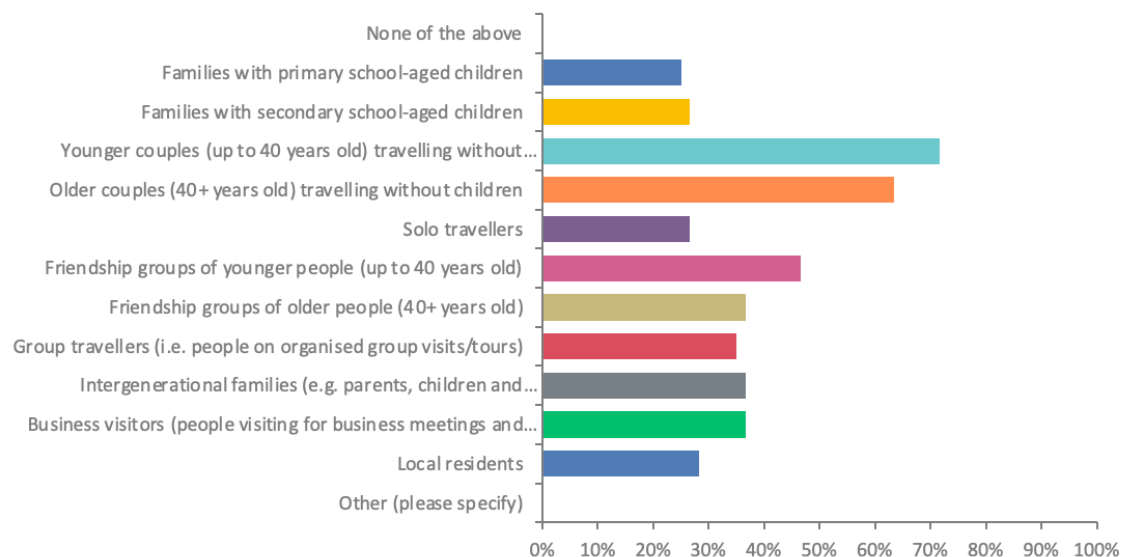
Drilling down into the types of visitor segments Winchester should focus on revealed a more targeted view as to which segments presented the greatest opportunity.

Younger and older couples were seen as the best prospects with over 2/3 of respondents selecting these two groups.

This was followed by friendship groups of younger people (47%) and then a pretty even spread across the other groups.

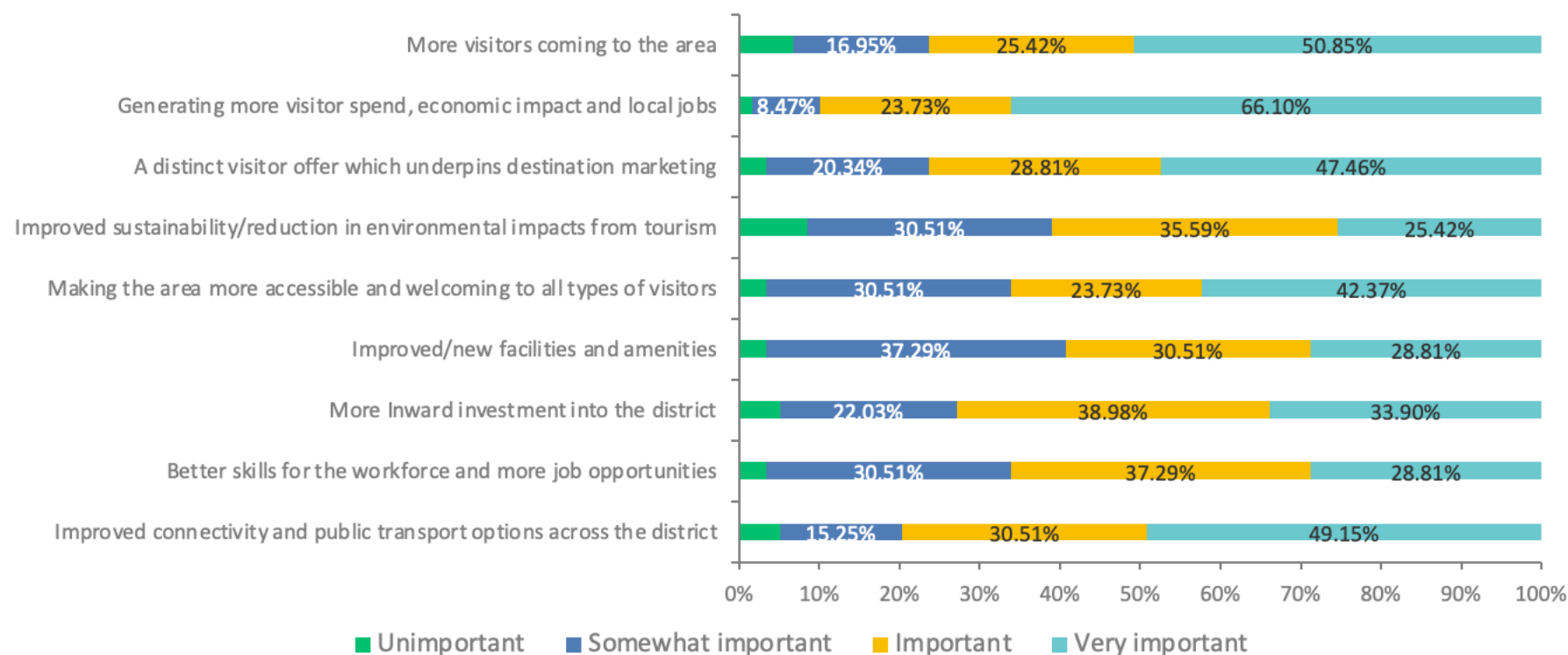
Families appeared relatively low in the responses, but this may reflect the smaller number of businesses which target this market currently.

Nonetheless there appears to be a stronger desire to reach out to younger audiences than Winchester may be attracting currently.



Strategy outcomes

A number of statements were put to survey respondents asking which of these a new tourism strategy could help Winchester achieve. For each statement, respondents could say whether they felt it was 'unimportant', 'somewhat important', 'important', or 'very important'. This showed relative importance of some outcomes. The statement receiving the strongest support was that about generating more economic impact, spend and jobs, followed by improved connectivity and generating more visitors.



While respondents scored other statements less high, even the lowest 'improved/new facilities and amenities' was still found to be important or very important to 59% of those responding.

Respondents were asked to provide suggestions to how these outcomes could be supported. Open ended answers were given a summary of which follows:

Key themes and suggestions for improvement include:

► Connectivity and Public Transport:

- Increase bus services to outlying villages like Droxford for locals, visitors, and environmental reasons.
- Introduce "tourist-style buses" for outlying villages.
- Improve connectivity and public transport access within and to Winchester, while acknowledging car use and park and ride options.
- Improve sustainable connectivity from Winchester Train Station to the town.
- Better public transport from outside the city centre, and improvements to the bus and railway station approaches.
- Consider coach travel to and from Winchester.
- More joined-up planning between councils and transport providers.

► Marketing and Promotion:

- Target airline and national interest magazines.
- Produce a restaurant/dining guide.
- Utilize airport advertising.
- Promote Winchester as a hub for visiting nearby National Parks, Portsmouth Historic Dockyard, the Isle of Wight, Salisbury, and Chichester.
- Attract more of the cruise ship market.
- Focus on younger generations (ages 20-30).

► Retail and High Street:

- Address the current retail profile, which lacks appealing and unique outlets, with too many barbers and nail bars.
- Encourage independent shops and food outlets to avoid the "carbon copy" feel of other cities.
- Reduce business rates to fill the High Street and support struggling shops.

► Visitor Experience and Infrastructure:

- Make parking affordable and remove time constraints to encourage longer, more relaxed visits and higher spend.
 - Improve signal reception and internet coverage.
 - Ensure the city centre is kept clean, tidy, and weed-free, and add more flowers.
 - Require newer, large-scale hotel accommodation with spa and convention space.
 - Improve accessible hotel provision, specifically mentioning the lack of properties with hoists or pool pals for disabled visitors.
 - Support unique independent visitor experiences.
 - Improve pedestrian and cycle access to offset increased vehicle use from more visitors.
- District-wide Tourism:
- Create links to and reasons to stop at villages and towns in the district, spreading footfall beyond Winchester itself.
 - Showcase traditional villages, specific towns for shopping/lunch, and walks in and around the district.

In order to understand how respondents felt about other aspects of Winchester’s visitor economy and any challenges they may face further statements were offered and respondents were asked to say whether they agreed or disagreed with them. The results are shown below:

| | DISAGREE STRONGLY | DISAGREE SLIGHTLY | NEITHER AGREE NOR DISAGREE | AGREE SLIGHTLY | AGREE STRONGLY | DON'T KNOW | TOTAL |
|--|----------------------|----------------------|----------------------------------|-------------------|-------------------|---------------|-------|
| The local tourism and hospitality workforce is skilled and motivated | 1.72% 1 | 5.17% 3 | 17.24% 10 | 39.66% 23 | 32.76% 19 | 3.45% 2 | 58 |
| Tourism businesses are constrained by a lack of available labour | 3.45% 2 | 13.79% 8 | 17.24% 10 | 36.21% 21 | 15.52% 9 | 13.79% 8 | 58 |

| | | | | | | | |
|---|------------|-------------|--------------|--------------|--------------|--------------|----|
| Tourism in Winchester is accessible and inclusive for all types of visitors | 3.51% 2 | 15.79% 9 | 21.05% 12 | 31.58% 18 | 22.81% 13 | 5.26% 3 | 57 |
| Tourism businesses do a good job of helping visitors understand the variety of experiences available in the area | 1.79% 1 | 12.50% 7 | 17.86% 10 | 33.93% 19 | 26.79% 15 | 7.14% 4 | 56 |
| Businesses are clear about where they can access advice to help them grow and develop their offer, including marketing resources and business support | 8.77% 5 | 12.28% 7 | 21.05% 12 | 22.81% 13 | 19.30% 11 | 15.79% 9 | 57 |
| Local networks provide tourism businesses with effective opportunities to collaborate | 5.26% 3 | 12.28% 7 | 21.05% 12 | 26.32% 15 | 28.07% 16 | 7.02% 4 | 57 |
| Visit Winchester (the tourism marketing arm of Winchester City Council) is an effective advocate and promotional partner for local tourism businesses | 3.51% 2 | 5.26% 3 | 14.04% 8 | 22.81% 13 | 43.86% 25 | 10.53% 6 | 57 |
| Within the wider Hampshire region, Winchester's marketing/positioning is clearly differentiated from neighbouring destinations | 5.36% 3 | 16.07% 9 | 16.07% 9 | 16.07% 9 | 26.79% 15 | 19.64% 11 | 56 |

| | | | | | | | |
|--|------------|-------------|--------------|--------------|-------------|-------------|----|
| Winchester City Council understands the needs of local tourism businesses and provides appropriate support | 7.02% 4 | 14.04% 8 | 26.32% 15 | 26.32% 15 | 15.79% 9 | 10.53% 6 | 57 |
|--|------------|-------------|--------------|--------------|-------------|-------------|----|

It offers further insights into how businesses feel about different aspects of the visitor economy and overall, the responses are encouraging while indicating where improvements could perhaps be made.

A further set of statements asked which factors would support the future growth of the Winchester visitor economy. The results are shown in the table below:

| | NOT AT ALL IMPORTANT | NOT VERY IMPORTANT | WILL MAKE NO DIFFERENCE | QUITE IMPORTANT | VERY IMPORTANT | DON'T KNOW | TOTAL |
|---|-------------------------|-----------------------|-------------------------------|--------------------|-------------------|---------------|-------|
| Incentives and advice for businesses to adopt sustainable practices (e.g. electric car charging points) | 3.77% 2 | 5.66% 3 | 22.64% 12 | 37.74% 20 | 26.42% 14 | 3.77% 2 | 53 |
| Resources to support accessibility and inclusion (e.g. business guides & toolkits, advice on accreditation) | 1.89% 1 | 1.89% 1 | 15.09% 8 | 37.74% 20 | 35.85% 19 | 7.55% 4 | 53 |
| Business networks that help stakeholders and businesses to support and promote each other | 1.89% 1 | 0.00% 0 | 7.55% 4 | 37.74% 20 | 45.28% 24 | 7.55% 4 | 53 |

| | | | | | | | |
|---|------------|------------|-------------|--------------|--------------|-------------|----|
| Support for workforce development (e.g. training for digital skills, management training) | 0.00% 0 | 3.85% 2 | 13.46% 7 | 38.46% 20 | 28.85% 15 | 15.38% 8 | 52 |
| Training and support to help businesses in developing tourism ideas e.g. new accommodation or experiences | 0.00% 0 | 0.00% 0 | 7.55% 4 | 41.51% 22 | 39.62% 21 | 11.32% 6 | 53 |
| Marketing support (e.g. toolkits, participation in shared marketing campaigns) | 0.00% 0 | 1.89% 1 | 3.77% 2 | 33.96% 18 | 50.94% 27 | 9.43% 5 | 53 |
| Better visitor insights and market research | 0.00% 0 | 1.89% 1 | 3.77% 2 | 33.96% 18 | 50.94% 27 | 9.43% 5 | 53 |

What can be seen from this is that over 80% of respondents felt that business networks, training support, marketing support and visitor insights were all quite or very important.

Respondents were asked what they might like visitors to say about Winchester in 5-10 years that they don't say now. This produced some interesting thoughts summarised here:

The desired visitor sentiments can be categorized into several key areas:

- ▶ **Vibrancy and Activity:** Visitors should describe Winchester as a vibrant city with lots going on, a buzzing and interesting place. This includes having a dynamic offer of theatre, music, and arts, which is currently seen as lacking.

- ▶ Variety and Repeat Visits: Visitors should feel there's "lots to do" and "so much to see and do", making them want to return soon. They should also express that they "didn't have enough time to visit all the attractions". The city should be seen as a place with "a lot of variety of places to visit" and "something for everyone all delivered with a professional and outstanding attention to detail".
- ▶ Unique Retail Experience: A strong desire for visitors to comment on "great shopping, not full of chain stores" and that it "hasn't got all the same shops as all other towns and cities" was expressed, along with a "stronger retail offer" and "better shops".
- ▶ Enhanced Accommodation and Infrastructure: Visitors should note a "good choice of quality accommodation in the city centre" and that more hotels and infrastructure have been built to cope with the number of visitors.
- ▶ Accessibility and Welcome: Desired comments include Winchester being "accessible, warm and welcoming", "accessible and has diversity", and where "accessibility and welcome is at the core everywhere".
- ▶ Cleanliness and Safety: Visitors should find it "clean, safe and distinctive" and "beautiful it was clean everybody was friendly".
- ▶ Weekend/Short Break Destination: The aspiration is for Winchester to be recognized as "the perfect short break destination", a "true weekend destination", and an "overnight or long weekend destination".
- ▶ Surrounding Area and Connectivity: Visitors should appreciate that the "surrounding area is beautiful and the historic market towns are worth exploring", and that Winchester is a "fantastic hub for exploring the beautiful surrounding villages and countryside", including wine tours at vineyards. Good connectivity to London and Southampton Dock is also a desired comment.
- ▶ Modernity and Inspiration: Visitors should describe Winchester as "not only cultural but also modern and vibrant", an "inspirational place for people wanting to explore a new exciting destination. Full of fun experiences, cool places to eat and drink, amazing places to stay, trendy".
- ▶ Festival City Status: One respondent specifically hoped visitors would say, "Winchester is a festival city".
- ▶ Ease of Information: Visitors should find that "Information for visitors was easy to find".

VisitWinchester

As well as enquiring which of the respondents were already members of VisitWinchester and of those what they most valued about their membership. The most valued aspects of membership were:

- ▶ **Networking and Collaboration:** Members highly value the opportunity to network with and get support from other tourism businesses and attractions. This includes shared discussions, exploring challenges and opportunities, and collaborating to promote Winchester's offer.
- ▶ **Information and Support:** Members appreciate receiving updates and information about what's happening in the city. Support for businesses via website and social media is also valued.
- ▶ **Inclusion in the "Winchester Offer":** Being included in how visitors perceive "The Winchester Offer" is important.
- ▶ **Accessibility to Visitors:** The connection to incoming visitors is seen as a valuable aspect.
- ▶ **Learning and Best Practices:** Members value learning from other businesses' best practices and advice.
- ▶ **Stakeholder Status:** Being a stakeholder in the city is also valued.

Those who were not members were also asked what might make them want to become a member. Responses varied but largely focussed on the need to provide tangible benefits, affordability, and an ability to join even if outside the district.

STAKEHOLDER WORKSHOP

During early July workshops were held across two days in venues in and outside Winchester. These drew approximately 60 stakeholders across the two days who were able to work together to identify challenges and opportunities for Winchester, priorities for the emerging tourism strategy and specific needs they have as businesses operating in the district.

One thing...

As an ice-breaker, we asked participants what the one thing was they would like to see in the tourism strategy. The results for the two days are shown on the following pages.

The views highlighted a number of recurring themes and priorities:

- ▶ A desire to attract younger audiences/ market growth
- ▶ Benefits spread across the whole district
- ▶ Improved awareness of the destination
- ▶ Enhanced public transport to connect the rural offer with the city
- ▶ Stronger collaboration and better packaging
- ▶ More robust insights to guide decisions



Blue Sail Winchester Tourism Strategy

Thursday 10 July...



Mapping & gapping for different markets...

We introduced a number of different markets that might be suitable for Winchester and asked participants to work together to identify Winchester's offer for these markets. We then asked them to highlight any 'gaps' or disappointments.

This work has supported the product audit presented earlier in this document. The markets we considered were:

- ▶ Cultural Explorers – couples aged 50+ without children
- ▶ Curious Families – with children under 12
- ▶ Global Experience Seekers – under 40s traveling as couples or groups including from overseas



Cultural Explorers

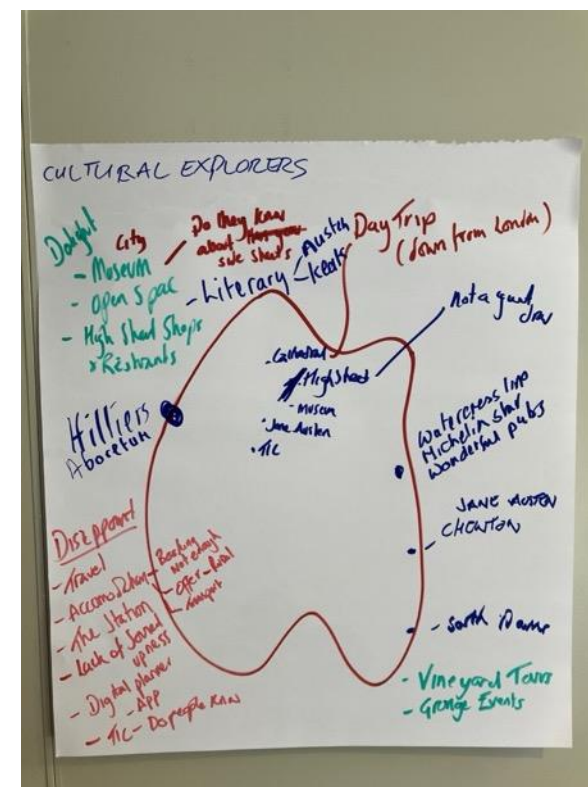
- Couples aged 50+ travelling without children
- Take lots of short breaks – enjoy planning

What's important?

- Small cities/towns & rural places
- Enjoy local culture, heritage, contemporary art, events
- Authentic local food & drink, inc experiences
- Quality, independent accommodation
- Landscapes and gentle outdoor activities

Rationale...

- Will engage in a variety of activities if the offer is right
- Affluent professionals, will spend for quality
- Will visit outside of peak times



Senses

We asked participants to explore Winchester through different senses. Developing words and phrases to describe it using only these senses. The outputs of this are helpful for the destination in finding new ways to describe the destination and in the development of a narrative to support marketing and positioning.

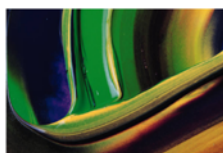
The senses we used were Colour; Sound; Smell; Taste; and Texture

Images showing what the groups produced across the two workshops are shown below:

Blue Sail Winchester Tourism Strategy

Colour - Workshop 1

- ▶ Green - watercress, grapes, landscape, fields, military museums, Christmas market
- ▶ Blue – sky, water in rivers & streams, tradition
- ▶ Grey – stone, heritage, flint
- ▶ Sparkle – trout, water
- ▶ White- chalk, cheese, bunting
- ▶ Pink – blossom, blooms, Hampshire pork
- ▶ Red – Christmas market
- ▶ Yellow – straw bales
- ▶ Orange - autumn
- ▶ Multi-coloured – hanging baskets, Hat Fair, bollards/art, butterflies, bunting (red, white & blue)

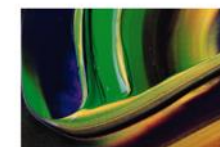


Farrow & Ball shades

Blue Sail Winchester Tourism Strategy

Colour - Workshop 2

- ▶ Green - trees in the city, open spaces of South Downs
- ▶ Blue – open skies of National Park
- ▶ White – chalk
- ▶ Autumn colours
- ▶ Lavender fields
- ▶ Grasslands – spring flowers
- ▶ Colourful – Bunting, Christmas decorations & festivities, Hat Fair, Buskers, characters
- ▶ Gardens - Abbey Gardens, ornamental planting elsewhere
- ▶ Hanging baskets
- ▶ Muted colours in branding
- ▶ Buildings – sandstone, brown of stone & brick, grey concrete
- ▶ Streetscapes – shop windows, flags, people & their outfits, signage/road signs, colour on Google Maps, buses, cars, posters



Colourful buildings in Alresford

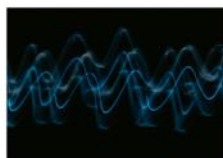
Blue Sail Winchester Tourism Strategy

Sound - Workshop 1

- ▶ *Community - bustling high street, people buskers, market, children, dogs, performances & festivals, dogs*
- ▶ *Nature - tranquil, peaceful, bird song, swifts*
- ▶ *Heritage - bells, steam trains, military bands*
- ▶ *Water - stream bubbling*

Less appealing

- ▶ *Infrastructure – motorway, cars, traffic, trains, planes*
- ▶ *Urban life – Big Issue seller, homeless people, charity collectors*

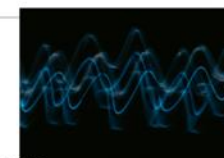


Different
languages
being spoken

Blue Sail Winchester Tourism Strategy

Sound - Workshop 2

- ▶ *Buskers - 'unique to Winch', Morris dancers/ MayFest*
- ▶ *Cathedral bells, choral music, organ, Hampshire youth orchestra*
- ▶ *Crunch of gravel*
- ▶ *Christmas – community choirs & bands*
- ▶ *Play parks - children playing, laughter*
- ▶ *Nature sounds in parks & reserves*
- ▶ *River sounds – canoeing, paddleboarding, wild swimming, splashing, fun*
- ▶ *Zoo – gibbons & flamingos*
- ▶ *Market sounds, sizzle of outdoor food stalls*
- ▶ *Echoes of the past, history tours*
- ▶ *Music – Boomtown, chamber music*
- ▶ *Range of languages*
- ▶ *Silk Mill – working machinery, looms, industrial heritage*
- ▶ *Students*
- ▶ *Plus: Traffic, sirens, building construction*



Buzz of
activity, life,
leisure &
sport

Blue Sail Winchester Tourism Strategy

Smell - Workshop 1

- ▶ Fresh air
- ▶ Wild flowers
- ▶ Lavender
- ▶ Chalk streams
- ▶ Foodie – BBQ grill, churros, coffee
- ▶ Markets – fruit & veg etc
- ▶ Christmas market – mulled wine, all spice, chestnuts
- ▶ Watercress line – steam
- ▶ Vineyards, gin distilleries, brewers

Plus:

- ▶ Car & train fumes
- ▶ Drains
- ▶ Gas leaks (construction)



Steam from
the
Watercress
Line

Blue Sail Winchester Tourism Strategy

Smell - Workshop 2

- ▶ Grass, especially with heat on it
- ▶ Water meadows
- ▶ Flowers
- ▶ Lavender
- ▶ Food & drink – eateries, different cuisines, street food, fish & meat stalls
- ▶ Cleaner air quality
- ▶ Inside Cathedral & Great Hall – old stone, incense, wood, books
- ▶ Botanicals – Bombay Sapphire Distillery
- ▶ Roses in Deanery Garden
- ▶ Smoke from Watercress Line & steam trains

Plus:

- ▶ Exhaust fumes
- ▶ Country smells – muck spreading in September, horse manure
- ▶ Bin smells



The smell of
history

Blue Sail Winchester Tourism Strategy

Taste - Workshop 1

- ▶ Diverse/ global cuisine
- ▶ Festivals – drinks & food
- ▶ Fresh – from markets, meat, selling from farm
- ▶ Local produce - Jude's ice cream
- ▶ Watercress – spicy/distinct
- ▶ Wine – fizz, upmarket
- ▶ Gin, beer, cocktails
- ▶ Cheese
- ▶ Rural/agricultural
- ▶ Farm shops
- ▶ Coffee/roasters
- ▶ Authentic
- ▶ Lavender
- ▶ Trout/ chalk streams



Spicy
watercress

Blue Sail Winchester Tourism Strategy

Taste - Workshop 2

- ▶ Local focus – Hampshire Fare
- ▶ Good range of options – cafes, pubs, farm shops, restaurants (e.g. Bar Lento), festivals (watercress), markets (Farmers', Christmas with mulled wine), coffee shops, distilleries
- ▶ Vineyards e.g. Black Chalk, Hattingley
- ▶ Many independents
- ▶ Wide range of cuisines
- ▶ Local produce – chalk stream trout, Isle of Wight tomatoes, cheese, fizz, chocolate, micro herbs, watercress, Jude's ice cream, Shoal gelato, venison, coffee, gin, olives
- ▶ Cocktail Week
- ▶ BBQ/outdoor cooking
- ▶ Pop-up catering vans
- ▶ N.B. Tend to close early, although trade responding to customers' changing patterns of behaviour



English
sparkling
wine

Blue Sail Winchester Tourism Strategy

Texture - Workshop 1

- ▶ Stone
- ▶ Grass
- ▶ Water
- ▶ Nature
- ▶ Bark/forest
- ▶ Cobbles
- ▶ Hilly
- ▶ Chalk
- ▶ Crumbly
- ▶ Spongy
- ▶ Soft
- ▶ Clean
- ▶ Makes you feel - *calm, safe, happy, relaxed rejuvenated, inspired*
- ▶ Not – *dusty, gritty, grimy, stark, sterile, industrial*



The feel is
lazy Sunday
afternoon
vibes

Blue Sail Winchester Tourism Strategy

Texture - Workshop 2

- ▶ Water- *chalk streams*
- ▶ Stone/cobbles/ flint
- ▶ Flagstones
- ▶ Embroidery & stained glass in Cathedral
- ▶ Bronze sculptures
- ▶ Buildings – *brickwork, limestone mortar, timber*
- ▶ Paper – *bookshops, maps*
- ▶ Grassland
- ▶ Chalk
- ▶ Silk mill
- ▶ Nature - *moss, bark , foliage, hedging & grass*
- ▶ Streets – *signs, bunting, food & drink, asphalt*
- ▶ Ornamental planting – *formal & informal gardens*
- ▶ Conversation



Medieval tiles

Priorities

Participants were asked to brainstorm priorities for the tourism strategy based on what had been heard and discussed so far. Groups then sorted and sifted the resulting priorities and through a scoring system identified the top 3 priorities which they felt the strategy must address.

Results from the groups at each workshop are as follows:

Blue Sail Winchester Tourism Strategy

Top Priorities – Workshop 1



Group A

- ▶ *Joined up transport (city to rural) e.g. shuttle bus, open top tours, heritage bus*
- ▶ *Boutique accommodation in the city*
- ▶ *Café culture, more pedestrianisation, links to night-time economy*

Group B

- ▶ *More collaboration between city & rural, around events, attractions, food & drink, shops*
- ▶ *Encouraging younger visitors 30+ by promoting contemporary offer, not always heritage focused*
- ▶ *Broader advertising for non-Winchester residents*

Blue Sail Winchester Tourism Strategy

Top Priorities – Workshop 1



Group C

- ▶ *New twist on old, don't take visitors for granted i.e. Heritage PLUS..*
- ▶ *Sustainable transport e.g. linking rural attractions & vineyards*
- ▶ *Visitor advertising at key gateways*

Group D

- ▶ *Investment in the sector, or at least no decline e.g. Hat Fair funding*
- ▶ *Clearer wayfinding – physical & digital*
- ▶ *Growing the night time economy e.g. spaces for gigs, outdoor offer, restaurants opening later*

Blue Sail Winchester Tourism Strategy

Top Priorities – Workshop 2



Group A

- ▶ *More collaboration between all groups involved in tourism*
- ▶ *Work with qualified social influencers to showcase wider offer i.e. so not focusing on just one venue*
- ▶ *Food network map and drive*

Group B

- ▶ *Better transport connections between city & rural plus Park & Ride for North*
- ▶ *Younger nightlife/evening entertainment*
- ▶ *Celebrating independent businesses more*

Blue Sail Winchester Tourism Strategy

Top Priorities – Workshop 2



Group C

- ▶ *Branding – whole district strategy*
- ▶ *Investment in rural buses & clarity around timetables/ destinations*
- ▶ *Focus on fun for 15 – 30 year olds, inc locals and students – different/modern activities*

Group D

- ▶ *Rural transport links & better traffic management to create seamless experience*
 - ▶ *Modern approach to marketing with confident tone of voice*
 - ▶ *Inclusive options – Winchester welcomes all (including prayer, food, neurodiversity, LGBTQIA, accessibility/purple pound)*
-

Additional priorities which were highlighted during the exercise and which have been categorised include:

Brand & Marketing

- ▶ Collaborative, joined up marketing for whole district
- ▶ Clear brand, including strong theme e.g. Manchester & bees
- ▶ Becoming a trade-ready destination (promoting to groups)
- ▶ Promote better internationally, inc links to cruise passengers
- ▶ Itineraries, including car & bus
- ▶ Championing & supporting independents
- ▶ Foster the local visitor market
- ▶ More promotion of wellness - walking, cycling etc
- ▶ Greater profile for military museums

Product

- ▶ Support for Hat Fair
- ▶ Investment in a flagship attraction
- ▶ Better evening offer & supporting infrastructure (parking, lighting, seating)
- ▶ More hotel beds inc family, different price points, quirky
- ▶ More active & wellbeing experiences e.g. Lido

Destination Collaboration

- ▶ Sharing of visitor statistics to inform decisions
- ▶ Collaboration with meaning & benefit e.g. PR partnership
- ▶ Multi-attraction ticket/ city pass, or package deals

- ▶ Visitor attractions network
- ▶ Access to tourism training

Tourism strategy

- ▶ A future-proof plan
- ▶ Aspirational visitor markets which aren't too niche
- ▶ Link to the cultural strategy

Physical experience – transport/signage/access

- ▶ Bus station improvements
- ▶ Warmer welcome at train station
- ▶ Strategy for good design across city & district
- ▶ More access to the water in city centre
- ▶ More meaningful start/end to South Downs Way
- ▶ Defined cycle routes/paths
- ▶ More visibility for park & ride

Other

- ▶ Places for teenagers to go that aren't sporty
- ▶ Lower business rates
- ▶ Working closely with landscape designers and architects, planning etc

Business needs...

Finally we asked participants to identify their/their business' needs.

Blue Sail Winchester Tourism Strategy

Wednesday 9 July...



Blue Sail Winchester Tourism Strategy

Thursday 10 July...



RESIDENTS SURVEY

The council worked with independent researchers in 2024 to carry out a doorstep survey of 1,600 residents across the district. The survey was all about gathering residents' opinions of the council and our services, as well as the area where they live. Some of the study areas are relevant to this work and are summarised below.

What cultural and creative activity would you enjoy seeing or doing in Winchester District? How could the local cultural and creative offer be improved?

Responses from residents across the Winchester District summarises feedback regarding their aspirations for cultural and creative activity and how the offer could be improved. While there is clear appreciation for existing events and venues, respondents identified a range of areas where the offer could be expanded, improved, or made more accessible. Their insights provide a roadmap for strategic investment in arts, heritage, and community life.

Theatre and Performance

Feedback from residents highlights an appreciation for local amateur theatre productions, especially those hosted at venues such as the Theatre Royal and Chesil Theatre. However, there is a strong desire for higher-quality, professional performances that rival those offered in Chichester and Newbury.

Attendees express frustration at the short duration of touring productions and call for longer runs that allow more people to attend. Moreover, there is a call for broader programming that includes more performances geared towards young audiences and teenagers. The need for theatrical and performance opportunities to reach areas outside of central Winchester is also evident, with residents advocating for a more geographically inclusive approach.

Live Music and Festivals

Residents across the district express a strong enthusiasm for live music and community festivals. There is consistent support for the continuation and expansion of events such as the Hat Fair and a clear interest in open-air concerts, classical music, and jazz. Respondents wish to see more diverse genres represented, including world music and traditional English folk. A particular request is the establishment of a city centre bandstand to support regular public performances. There is also a demand for a mid-sized music venue to accommodate both local and professional acts, filling a gap between small pub gigs and larger-scale concerts held outside the district.

Visual Arts and Exhibitions

While the Arc is appreciated for its exhibitions, many feel that the current space is too limited to meet the cultural appetite of the city. Residents would like to see a purpose-built gallery space with the capacity to host larger and more ambitious exhibitions. A greater frequency and variety of exhibits is requested, alongside supplementary programming such as artist talks, curator-led tours, and hands-on workshops. More emphasis on showcasing painting and curated collections of local and national significance would also be welcomed.

Cinema and Screen Arts

The closure of venues and limitations in current cinema offerings have led to growing demand for a broader and more inclusive film culture. Residents call for arthouse, foreign-language, and independent cinema programming, as well as dedicated film festivals. Open-air cinema events, especially in scenic locations such as Cathedral grounds and parks, are frequently mentioned as a popular and enjoyable way to experience film.

Workshops, Learning, and Cultural Exchange

The community demonstrates a strong interest in creative learning opportunities for adults. Desired workshops include crafts, creative writing, machine embroidery, and seasonal projects such as wreath-making. Respondents highlight the lack of inclusive social spaces for people aged 30–60 to connect over hobbies and shared interests. Furthermore, there is enthusiasm for language learning and cultural exchange groups that can foster deeper community connections across diverse backgrounds. These initiatives are seen as important to the social fabric of Winchester, offering both enjoyment and enrichment.

Communication and Accessibility

A critical barrier to participation in cultural life is the lack of a unified and accessible system for publicising events. Many respondents express frustration at missing events due to fragmented or insufficient communication. Suggestions include the creation of a centralised “what’s on” hub, both online and in print, which consolidates event listings from across the district. Clear signage, maps, and better coordination among venues are also seen as necessary to enhance the cultural experience for residents and visitors alike.

Infrastructure and Venue Support

Residents recognise the value of existing cultural institutions and advocate for sustained and increased support for venues such as the Theatre Royal, the Arc, the Nutshell, and local libraries. At the same time, there is a widespread desire for new infrastructure to support a growing and diverse cultural offering. This includes a permanent bandstand in the city centre and the development of a modern auditorium capable of hosting music, theatre, and community events. Accessibility improvements, including better public transport links and more affordable venue hire, are also considered essential for wider participation.

Community and Cultural Diversity

There is a clear call for cultural programming that reflects the diversity of Winchester's population. Respondents propose events that celebrate a range of cultural heritages, such as multicultural food and music festivals. Examples like the Mela Festival in Southampton are cited as inspirational. Other suggestions include traditional English festivities like May Day, and opportunities for community storytelling, dance, and collaborative artmaking. Respondents also suggest reviving historical skills demonstrations, such as blacksmithing and thatching, as part of cultural heritage education.

Conclusions

The feedback from residents across Winchester District paints a clear picture: there is strong appreciation for the existing cultural and creative scene, but also a real appetite for more diverse, accessible, and inclusive opportunities. Whether it's theatre, live music, visual arts, film, or workshops, people want richer experiences that reflect the full character of the district and bring communities together.

Recommendations

To build on this, investment should focus on expanding and diversifying the cultural offer — including more professional performances, a wider range of music and art events, and creative learning for adults. Infrastructure upgrades, such as a mid-sized music venue, dedicated gallery space, and a central bandstand, would unlock new possibilities for cultural engagement. Just as importantly, improving communication through a centralised events platform and better signage will help more residents discover and take part in what's already happening. A focus on inclusivity, heritage, and community connection should be considered for any future planning.

Barriers to Engagement in Cultural and Creative Activities

This report summarises key barriers to participation in cultural and creative activities, based on community feedback collected from the annual residents survey. Respondents provided a wide range of views, representing a diverse cross-section of the population.

Cost as a Barrier

One of the most frequently mentioned barriers was the cost of participating in cultural activities. Respondents expressed concern over the high price of tickets for events, exhibitions, and performances. This issue was particularly acute for families and individuals on lower incomes, who felt excluded from many of the opportunities on offer due to unaffordable pricing. Some highlighted frustration at the presence of hidden costs, such as parking fees or having to pay to access stalls within what were otherwise advertised as free events. There was a clear call for more affordable, inclusive pricing models and a greater number of free or pay-what-you-can activities to ensure that cultural engagement is not limited by financial means.

Transport and Accessibility Challenges

Transport and parking were also recurring themes. Many participants cited difficulty accessing events due to limited public transport services, especially during evenings and weekends. Those living in more rural areas or without private vehicles felt particularly disadvantaged. In addition, the cost and availability of parking in the city centre were viewed as significant deterrents. In some cases, poorly lit streets or inadequate signage further discouraged attendance, especially among older residents or those unfamiliar with the area. This underlines a need for improved transport infrastructure and greater consideration of the journey experience in planning cultural events.

Timing and Scheduling Conflicts

Another common concern related to the timing of events. Many activities were scheduled during weekday evenings, which conflicted with work commitments or family responsibilities. Older adults and caregivers reported feeling excluded due to a lack of daytime events or flexible programming. Several respondents expressed a desire for cultural opportunities that fit more easily into their daily routines, including events held on weekends or repeated at different times to increase accessibility.

Physical and Sensory Accessibility

Physical access to venues emerged as a significant issue for individuals with disabilities or health concerns. Some respondents noted the absence of step-free entrances, accessible toilets, and seating options suitable for people with limited mobility. Poor lighting and uneven surfaces around certain venues created additional challenges, particularly for those with visual impairments. The current state of accessibility in some venues may inadvertently deter

attendance from those who would otherwise wish to engage. Improvements in this area are essential to ensure that all residents feel welcome and able to participate fully.

Information and Communication Gaps

A notable number of people mentioned that they were often unaware of events taking place until after they had occurred. Many cited poor communication, last-minute advertising, and the lack of a centralised listing or promotional platform. There was a widespread perception that existing publicity efforts failed to reach beyond central Winchester, with suburban and rural residents feeling left out. Suggestions were made for a regular, city-wide “What’s On” guide—available both online and in print—and better use of local media, social networks, and community centres to spread information more effectively.

Atmosphere and Cultural Inclusivity

Some respondents reported that the atmosphere at certain events felt exclusive or unwelcoming. Comments suggested that particular events seemed geared toward specific demographic or social groups, leaving others feeling like outsiders. There were also mentions of discomfort with crowds, excessive noise, or alcohol consumption, which could detract from the experience for more introverted attendees. At the same time, a portion of feedback expressed unease around changes in cultural programming perceived to be driven by political agendas. This tension points to a need for balanced, inclusive programming that welcomes diversity while fostering a respectful and safe environment for all.

Health, Age, and Personal Circumstances

For some, personal health or age-related factors posed significant barriers to engagement. Chronic illness, disability, or the need for assistance when travelling meant that attending events independently was not always possible. Several participants expressed interest in hybrid or digital alternatives that would allow them to engage from home when attending in person was not feasible. There was also an expressed need for better support systems, such as community transport or “buddy” schemes, to help those who rely on others to access cultural opportunities.

Conclusions

- ▶ **Cost is a major barrier to participation**, particularly for low-income residents and families. High ticket prices and hidden costs (e.g. parking, on-site purchases) discourage attendance and people feel excluded.

- ▶ **Transport and travel limitations**—especially during evenings and weekends—make it difficult for those without access to a car, or living in rural areas, to attend events. Parking availability and cost in the city centre are also common deterrents.
- ▶ **Event scheduling often clashes with real-life responsibilities.** Many events are held during weekday evenings, limiting access for those with work or caregiving duties. A lack of flexible and daytime programming excludes older residents and carers.
- ▶ **Venue accessibility is inconsistent.** Physical and sensory barriers—such as steps, inadequate signage, poor lighting, or lack of accessible facilities—prevent residents with disabilities or health conditions from attending comfortably.
- ▶ **There are gaps in information and communication.** Many residents report finding out about events too late or not at all. Promotion is often city centre based and does not reach the wider rural communities effectively.
- ▶ **Cultural programming can feel exclusive.** Some events are perceived as catering to specific social groups, creating an unwelcoming or intimidating environment for others. Crowds, noise, or alcohol can further alienate certain audiences.
- ▶ **Health, age, and dependency factors limit independent attendance.** Residents with chronic conditions, disabilities, or mobility challenges often require additional support or alternatives such as online access.

Recommendations

To improve engagement in cultural and creative activities, a range of inclusive measures is recommended. Affordability remains a key barrier, so introducing low-cost, pay-what-you-can, and free event options is essential. Improved transport options—especially in rural areas—and clearer event scheduling that includes daytime and weekend programming would support wider access.

Accessibility also needs attention, both physically and in terms of communication. Venues should be equipped with step-free access, accessible facilities, and sensory-friendly environments. Better outreach through a centralised events listing and community channels will ensure more residents are informed. Finally, offering digital or assisted participation options, such as livestreams or community transport, will help remove barriers for those with health or mobility challenges. Together, these steps create a more inclusive and accessible cultural landscape.

Cultural and Creative Activities

There is widespread agreement on cultural value and activity, along with good support for community and place making. There is a desire for events, public art and innovation and a desire to expand the cultural activity beyond the city.

- ▶ Average rating across all statements: 4.43 out of 5
- ▶ Strongly agree or agree across statements: Over 95% on most indicators
- ▶ Lowest rated areas: lack of awareness of cultural offerings and range and accessibility of available venues

| Survey Statement | Mean Score | Strongly Agree | Agree | Neither Agree nor Disagree | Disagree | Strongly Disagree |
|---|-------------|----------------|-------|----------------------------|----------|-------------------|
| Cultural and creative activities contribute positively to the quality of my life | 4.77 | 78% | 22% | - | - | 0% |
| Cultural and creative activities are good for young people | 4.70 | 70% | 29% | - | 0% | - |
| Winchester district should support and encourage the creative industries | 4.65 | 66% | 34% | - | 0% | - |
| Creative and cultural activities help make the Winchester district a better place to live, work, visit and play | 4.58 | 62% | 36% | - | 2% | - |
| Cultural and creative activities contribute to Winchester district residents' wellbeing | 4.57 | 60% | 39% | - | 1% | - |
| I would enjoy 'pop-up' creative activity in Winchester district (for example temporary exhibitions in empty shops, or mini-festivals in town squares) | 4.55 | 63% | 34% | - | 2% | 1% |
| Winchester district should use creative and cultural activity to bring people together | 4.53 | 56% | 42% | - | 1% | 0% |
| Winchester district should offer spaces for local makers to sell their products | 4.50 | 56% | 41% | - | 2% | 1% |
| Winchester district should support and encourage new festivals | 4.46 | 55% | 42% | - | 2% | 1% |
| I enjoy attending festivals in Winchester district | 4.40 | 49% | 46% | - | 4% | 1% |
| I would like cultural and creative activity beyond the city centre | 4.40 | 49% | 47% | - | 3% | 1% |

| | | | | | | |
|---|-------------|-----|-----|---|-----|----|
| I would enjoy public art in Winchester district (for example murals, sculptures and decorative benches) | 4.39 | 53% | 41% | - | 6% | 1% |
| Cultural and creative activities help me feel part of the community | 4.38 | 46% | 50% | - | 4% | 0% |
| There is a good range of arts, culture and heritage venues and activities near where I live | 3.73 | 17% | 62% | - | 19% | 2% |
| I feel well informed about what's on offer locally | 3.47 | 10% | 60% | - | 26% | 4% |

The cultural and creative activity survey in Winchester District reveals a consistently strong level of public support for the role that arts and culture play in people's lives. The overall average rating across all statements was 4.43 out of 5, with the vast majority of respondents strongly agreeing or agreeing with each statement—often above 95% combined agreement. These responses highlight the depth of appreciation for creative and cultural activity, both personally and across the wider community.

There is particularly strong consensus around the positive impact of cultural activity on quality of life, community wellbeing, and support for young people. For example, 100% of respondents agreed that cultural and creative activities contribute positively to their quality of life, with 78% strongly agreeing. There was also universal support for cultural activity being beneficial to young people and strong belief that Winchester District should support and encourage the creative industries. These results provide a clear mandate for continued investment in the cultural sector as a means to support residents' wellbeing, inclusion, and local identity.

Respondents also expressed a strong appetite for activity that is visible, accessible, and place-based. Many indicated they would enjoy pop-up creative events, public art installations, and the introduction of new festivals. There was clear interest in seeing these types of activity take place beyond the city centre, pointing to the need for a more equal spread of cultural opportunities across the wider district.

However, the findings also point to some important areas for improvement. The lowest scoring statements related to awareness and access. A significant portion of respondents indicated that they do not feel well informed about what's available locally, with 30% disagreeing or strongly disagreeing with this statement. Additionally, over one in five respondents expressed concern about the range of arts, culture and heritage venues near where they live. These responses suggest that, while there is clear enthusiasm for cultural engagement, awareness of opportunities is limited, and the current cultural offer may not be reaching all communities effectively.

In summary, the survey provides evidence that the public values cultural and creative activity and wants to see it supported and expanded. There is a strong opportunity to enhance existing strengths by investing in more locally distributed, visible and inclusive activity, while also improving communication so residents are better informed about what's on offer.

8 VISITOR/ NON-VISITOR PANEL SURVEY

ABOUT THE SURVEY

The panel survey was designed to support the development of a new tourism strategy for Winchester City and District. The online survey was conducted between May 30th and June 22nd, 2025, gathering 1,015 interviews from recent visitors (visited in the last 2 years), past visitors (visited over 2 years ago), and non-visitors, as well as local (Hampshire residents) and non-local respondents.

Core Research Objectives

The main purpose of the panel survey was:

- ▶ To profile existing and potential audiences.
- ▶ To measure awareness and understanding of Winchester as a visitor destination.
- ▶ To explore which aspects of Winchester's visitor offer have the greatest appeal.

A detailed presentation of the survey results is available as a separate document and below are some of the key findings.

KEY FINDINGS

- ▶ **Visitor Profile:** Recent and past visitors tend to be older than non-visitors. The socio-economic profile is relatively consistent across all audiences, with adult-only groups forming the majority of Winchester visitors and outnumbering families by a ratio of 3:1. Three in five recent visitors live in South East England, predominantly in Hampshire.
- ▶ **Travel Behaviour:** Recent visitors frequently take day trips within the UK, with one in three doing so monthly or more often. All audiences are most likely to take a UK short break or holiday once or twice a year. Most visitors are willing to travel up to 2 hours for a day trip and up to 3 hours for a short break or holiday. Approximately 3 in 10 visitors stay overnight.



- ▶ **Motivations for Visiting:** All three audience types are drawn to similar factors when choosing a UK destination. Historic cities/towns are the leading factor for recent and past visitors, and a significant factor for non-visitors. Other appealing aspects include good places to eat and drink, rich heritage and historical attractions, and beautiful rural landscapes.
- ▶ **Perceptions of Winchester:** There is limited knowledge of Winchester among non-visitors, with three in five knowing nothing about it. Recent visitors are the most informed, though only a minority feel they know it "very well". All three visitor audiences (recent/past/non) primarily associate Winchester with history and heritage. Winchester is consistently described as historic, traditional, beautiful, and cultural. "Walkable" also features in the top five descriptions across all audiences. Some non-visitors perceive it as "old-fashioned". Views, though favourable, are generally city-centric.
- ▶ **Visitor Experience & Appeal:** Recent visitors are more positive about Winchester's visitor offer than past visitors. There is low awareness of activities in Winchester. Perceptions regarding ease of travel are a barrier for non-visitors. Lack of awareness is the primary barrier for those who have never visited, while distance is also a factor for those who haven't visited recently. The overall visitor proposition for Winchester receives an almost unanimous positive response, with stronger positivity among older age groups. The appeal lies in Winchester's combination of traditional and contemporary elements, and its blend of city and rural attractions. Its ease of access from London is also a key appeal.
- ▶ **Activities in Winchester:** The most popular activity for both recent and past visitors is a general visit to Winchester City. Other popular activities include going to restaurants or bars, visiting heritage sites or museums, walking, and shopping.

Implications for Winchester as a result of the survey findings are:

- ▶ Family short breaks could be a potential area of growth as demonstrated by a willingness to visit.
- ▶ Younger audiences have a broader set of place requirements and both they and families will be looking for a wider variety of accommodation options
- ▶ Overall there is a need to improve awareness of the Winchester District offer among target audiences.

Disclaimer: All information and analysis supplied by Blue Sail Consulting Ltd and our sub-contractors is delivered in good faith and represents our professional judgement based on the information obtained from the client and elsewhere. The achievement of recommendations, forecasts and valuations depend on factors beyond our control. Any projections, financial or otherwise, in this report are only intended to illustrate particular points of argument and do not constitute forecasts of actual performance