

HAMPSHIRE FACTSHEETS

15: Tourism

This is one of a series of factsheets prepared by Hampshire County Council's Environment Department. These factsheets provide statistics and information on a number of issues for the whole of Hampshire, including the cities of Southampton and Portsmouth. The whole compendium of factsheets can be seen at www.hants.gov.uk/planning/factsandfigures

This factsheet looks at Tourism. Hampshire is the most visited county in the South East and the 6th most visited county nationally. Tourism makes a significant contribution to the Hampshire economy. Links to all referenced documents can be found at the end of this Factsheet.

How many visitors are there to Hampshire:

In 2008 there were 3.8 million domestic overnight trips in Hampshire generating a total spend of £566 million. An additional 626,000 inbound visits accounted for £289 million in expenditure. There were also 37 million tourism day trips in the same year spending a total of £1.55 billion (*Cambridge Model 2008*).

The major purpose of visits to Hampshire is holidays with over 50% of overnight trips being for that purpose. Work/ business reasons account for approximately 20% of visits. However, the county is the 6th most popular nationally for overnight domestic business visits (*Cambridge Model 2008; UKTS 2009*).

Contribution to the economy:

The total value of tourism to the Hampshire economy was £2.67 billion in 2008 (*Cambridge Model 2008*). 5.6% of the Gross Value Added (GVA) to the Hampshire economy (£29.8 billion, 2007) could be attributed to tourism (£1.68 billion, 2007) (*Experian UK Local Market Forecasts South East Region 2010, copyright Experian 2009*).

Employment in Tourism:

In 2008 43,500 individuals were employed in tourism in Hampshire, representing 7.7% of the county's total employment (*ABI 2008*).

Major tourism related employment locations:

New Forest, Southampton and Portsmouth provide the major locations for tourism related employment. This reflects the role of the New Forest as an important leisure tourist destination and the importance of service industries to the two cities

% of total employment by district

| Hampshire local authority | Employment in Tourism % of Total Employment |
|---------------------------|--|
| Basingstoke | 6.5% |
| East Hants | 6.5% |
| Eastleigh | 5.2% |
| Fareham | 5.0% |
| Gosport | 4.0% |
| Hart | 2.5% |
| Havant | 7.1% |
| New Forest | 16.9% |
| Portsmouth | 16.8% |
| Rushmoor | 2.0% |
| Southampton | 13.2% |
| Test Valley | 7.0% |
| Winchester | 7.4% |

Source: ABI 2008

Leisure day visits:

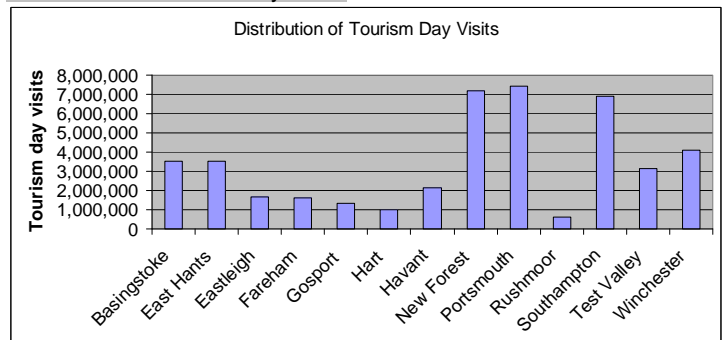
There were 37 million day visitors to Hampshire in 2008, spending £1.55bn (*Cambridge Model 2008*). The New Forest, Portsmouth and Southampton are the major destinations for these trips.

Leisure day visits

| | Visits (millions) | Spending (£billion) |
|------------------|----------------------|------------------------|
| Hampshire | 37 | £1.55 |
| Southern Region | 94 | £2.14 |
| United Kingdom | 1,261 | £31.3 |

Source: LDVS 1998; Cambridge Model 2008

Distribution of Tourist Day Visits



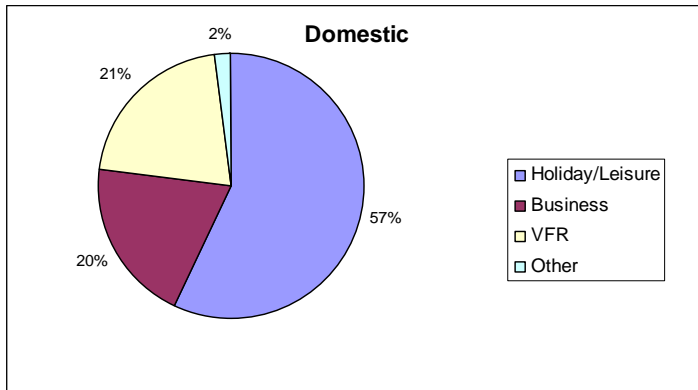
Source: LDVS 1998; Cambridge Model 2008

Tourism spend by trip type:

Holiday/leisure purposes was the most common reason for domestic overnight staying trips

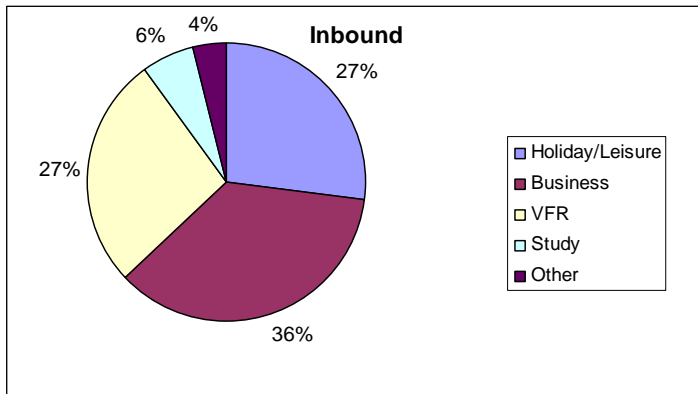
whereas business trips were predominant for inbound staying visits.

Domestic share of visitor spend by trip type



Source: UKTS; Cambridge Model 2008

Inbound share of visitor spend by trip type



Source: UKTS; Cambridge Model 2008

Distribution of visitors:

Distribution of visitors across Hampshire

| Hampshire local authority | Domestic | | Inbound | |
|---------------------------|----------|-------|---------|-------|
| | Trips | Spend | Trips | Spend |
| | % | % | % | % |
| Basingstoke | 6 | 5 | 8 | 7 |
| East Hants | 5 | 5 | 5 | 5 |
| Eastleigh | 5 | 4 | 5 | 5 |
| Fareham | 5 | 4 | 4 | 3 |
| Gosport | 3 | 3 | 3 | 3 |
| Hart | 4 | 3 | 5 | 5 |
| Havant | 8 | 8 | 7 | 7 |
| New Forest | 21 | 24 | 13 | 15 |
| Portsmouth | 14 | 16 | 17 | 19 |
| Rushmoor | 4 | 4 | 4 | 3 |
| Southampton | 13 | 14 | 15 | 15 |
| Test Valley | 5 | 5 | 6 | 5 |
| Winchester | 6 | 6 | 8 | 9 |

Source: UKTS; Cambridge Model 2008

The New Forest is the most popular place for domestic overnight visits, demonstrating its popularity as a holiday destination. Portsmouth and Southampton attract the highest proportions of overseas visitors.

Proportion of visitors from overseas:

Hampshire had the second highest proportion of overseas visitors staying in 2009 in the south east. This equated to the second highest percentage of spend.

Overseas visits to Hampshire and South East 2009

| | Staying Visits | | Nights | | Spend | |
|------------------|----------------|------------|-------------|------------|------------|------------|
| | 000 | % | m | % | £m | % |
| South East | 4,310 | 14.4 | 31.7 | 13.8 | 1,863 | 11.3 |
| Hampshire | 626 | 2.1 | 4.49 | 2.0 | 289 | 1.8 |
| Isle of Wight | 45 | 0.2 | 0.3 | 0.1 | 13 | 0.1 |
| Berkshire | 554 | 1.9 | 4.0 | 1.7 | 250 | 1.5 |
| Buckinghamshire | 304 | 1.0 | 2.2 | 1.0 | 115 | 0.7 |
| Oxfordshire | 557 | 1.9 | 4.1 | 1.8 | 234 | 1.4 |
| East Sussex | 596 | 2.0 | 4.6 | 2.0 | 294 | 1.8 |
| Kent | 870 | 2.9 | 5.3 | 2.3 | 323 | 2.0 |
| Surrey | 547 | 1.8 | 4.2 | 1.8 | 215 | 1.3 |
| West Sussex | 454 | 1.5 | 2.4 | 1.0 | 131 | 0.8 |
| England | 25,402 | 85.0 | 199 | 86.9 | 14,426 | 87.4 |
| UK | 29,889 | 100 | 229 | 100 | 16,500 | 100 |

Source: IPS

Visitor attractions:

Hampshire possesses one of the highest concentrations of permanent visitor attractions, leisure facilities and heritage sites within any county in the UK (UKTS).

Popular leisure destinations such as the New Forest, Winchester and Portsmouth with their rich histories have spawned a host of places to visit.

The county also hosts hundreds of regular special events, shows and festivals, featuring sports, the countryside, literature, the arts, and the county's defence and naval heritage.

Regular major events include:

- Southampton International Boat Show
- Farnborough International Airshow
- Portsmouth Navy Days
- The New Forest Show

Visits to major Hampshire attractions:

The most popular free and paid entry attractions in Hampshire in 2009 (unless noted otherwise) are as follows:

Visits to major attractions

Visits to Major Hampshire Attractions (>20k att.) in 2009

| | Attendance | Entry |
|---|---------------|-------|
| Historic Properties | | |
| Portsmouth Historic Dockyard | 532,158 | P |
| Spinnaker Tower, Portsmouth | 389,440**** | P |
| Winchester Cathedral | 331,000(E)*** | P |
| The Great Hall, Winchester | 131,037*** | F |
| Mid Hants Railway 'Watercress Line', Alton | 129,788*** | P |
| Portsmouth Cathedral | 68,952* | F |
| Portchester Castle | 40,390 | P |
| Jane Austen's House, Alton | 40,112 | P |
| Gilbert White's House & Oates Museum, Petersfield | 29,702*** | P |
| Winchester City Mill | 32,353 | P |
| Romsey Abbey | 32,500 | F |
| Gardens | | |
| Mottisfont Abbey Garden, Romsey | 162,165 | P |
| Sir Harold Hillier Gardens, Romsey | 149,806 | P |
| Exbury Gardens & Steam Railway, New Forest | 122,226 | P |
| The Wyne, Basingstoke | 112,939 | P |
| West Dean Garden, Hook | 69,668 | P |
| Hinton Ampner Garden, Winchester | 73,543 | P |
| Museums & Art Galleries | | |
| Beaulieu, New Forest | 351,975 | P |
| Milestones, Basingstoke | 89,661 | P |
| D-Day Museum, Southsea | 83,876* | P |
| Buckler's Hard Historic Village, Beaulieu | 80,000(E)** | P |
| Royal Armouries Fort Nelson, Fareham | 76,715 | P |
| INTECH, Hampshire Technology Centre, Winchester | 75,126*** | P |
| Portsmouth City Museum and Art Gallery | 69,139* | F |
| Southampton Art Gallery | 54,178* | F |
| Royal Navy Submarine Museum, Gosport | 53,556*** | P |
| Southampton Maritime Museum | 52,668* | P |
| Winchester City Museum | 48,067*** | F |
| Westgate Museum, Winchester | 36,620*** | P |
| Royal Marines Museum, Southsea | 35,303*** | P |
| Westbury Manor Museum, Fareham | 34,210 | F |
| Gosport Mezzanine Museum | 32,522 | F |
| Winchester Discovery Centre | 29,851 | F |
| Willis Museum, Basingstoke | 29,106 | F |
| Museum of Army Flying, Andover | 29,000*** | P |
| Hollycombe Steam Collection, Liphook | 27,865* | P |
| Andover Museum | 27,070 | F |
| St Barbes Museum, Lyminster | 26,909 | |
| Eastleigh Museum | 23,844 | F |
| Zoos and Animal Attractions | | |
| Marwell Zoo, Winchester | 530,000**** | P |
| Manor Farm Country Park, Bursledon | 135,357*** | P |
| Staunton Country Park, Havant | 134,527*** | P |
| Birdworld, Farnham | 130,033*** | P |
| Titchfield Haven Nature Reserve, Fareham | 50,307 | P |
| Hawk Conservancy Centre, Andover | 42,259*** | P |
| Theme and Country Parks | | |
| Paulton's Park, Romsey | 550,000(E)* | P |

| | | |
|--|------------|---|
| Royal Victoria Country Park, Netley | 500,000(E) | P |
| Queen Elizabeth Country Park, Horndean | 344,442 | F |
| Itchen Valley Country Park, Eastleigh | 235,638 | F |
| Wellington Country Park | 145,000 | P |
| Eastleigh Lakeside Railway | 84,567*** | P |

* 2004 attendance; ** 2003 attendances; *** 2005; **** 2007; E: Estimate; F: Free; P: Paying
Source: Visitor Attraction Trends England, Visit Britain; Individual attractions

Hampshire accommodation stock:

In 2007, Hampshire had the largest proportion of the South East's accommodation stock (18.3%), followed by Kent (16.9%), Isle of Wight (15.4%) and East Sussex (14.2%). Berkshire (5.0%), Buckinghamshire (5.1%) and Surrey (6.9%) have much smaller quantities (*South East Accommodation Audit 2007*).

72% of businesses comprised serviced accommodation, 22% were self-catering and 4% caravan and camping. Although caravan and camping sites made up a small number of businesses they provided 52% of the county's bedspaces (mostly in the New Forest), followed by 39% in serviced stock and 4.5% in group accommodation. Self-catering accommodation amounted to only 3.4% of the county's bedspaces. 43% of Hampshire's accommodation stock was quality assured under the Visit Britain or AA schemes, which is broadly the same as for the South East region as a whole (*South East Accommodation Audit 2007*).

Hampshire Accommodation Stock Analysis

| | No. Businesses | | No. Bedrooms, units or pitches | | No. Bedspaces | |
|-------------------|----------------|--------------|--------------------------------|--------------|---------------|--------------|
| | Count | % | Count | % | Count | % |
| Caravan & Camping | 80 | 4.3 | 10,807 | 35.0 | 44,621 | 52.0 |
| Group | 14 | 0.8 | 2,727 | 8.8 | 3,853 | 4.5 |
| Self Catering | 410 | 22.2 | 754 | 2.4 | 2,920 | 3.4 |
| Holiday Centres | 2 | 0.1 | 409 | 1.3 | 1,123 | 1.3 |
| Serviced | 1,336 | 72.5 | 16,198 | 52.4 | 33,322 | 38.8 |
| TOTAL | 1,842 | 100.0 | 30,895 | 100.0 | 85,839 | 100.0 |

| | No. Quality Assured | | No. Ungraded | | No. Unknown | | No. Estimated | |
|-------------------|---------------------|-------------|--------------|-------------|-------------|------------|---------------|-------------|
| | Count | % | Count | % | Count | % | Count | % |
| Caravan & Camping | 30 | 37.5 | 50 | 62.5 | 1 | 1.2 | 78 | 97.5 |
| Group | 3 | 21.4 | 11 | 78.6 | 1 | 1.2 | 0 | 0.0 |
| Self Catering | 227 | 55.4 | 183 | 44.6 | 61 | 14.9 | 55 | 13.4 |
| Holiday Centres | 2 | 100.0 | 0 | 0.0 | 0 | 0.0 | 0 | 0.0 |
| Serviced | 526 | 39.4 | 810 | 60.6 | 63 | 4.7 | 164 | 12.3 |
| TOTAL | 788 | 42.8 | 1,054 | 57.2 | 126 | 6.8 | 297 | 16.1 |

Source: South East Accommodation Audit 2007

Much of the county's of bed stock is located within the New Forest, and accounts for 45% of total bedspaces. Other destinations such as Portsmouth (9%), Winchester (8%) and Southampton (7%) have much smaller proportions.

Serviced accommodation occupancy:

Hampshire achieves slightly higher occupancy rates than the regional average. This is likely to be a result of the county's strong leisure and business tourism appeal, with both markets complimenting one another and ensuring all-year demand.

Average Annual Room Occupancy in Hampshire

| | 2007 | 2008 |
|-----------------|------|------|
| Hampshire | 64% | 63% |
| Southern Region | 61% | 59% |

Source: Hampshire Tourism Trends Survey; UKOS

Future Issues:

Hampshire has a diverse tourism sector that is not reliant on one single market. Leisure and business tourism are both important. The county has two national parks, three cities, a rich cultural heritage and a coastline that is world-renowned for watersports. There has been significant investment in new hotels, visitor attractions and culture in recent years which should help the county capture a greater share of tourism spend.

However, Hampshire's tourism industry will have to compete for business in a world that is demanding higher standards, increased value and improved access to information, especially on-line.

London 2012 may well boost interest in water and other outdoor pursuits in the Hampshire area. It is also expected that the growth in the cruise industry will continue to bring additional spending to Southampton.

Additional investment in major new visitor attractions in Portsmouth (new Mary Rose Museum) and Southampton (Sea City Museum), and increased interest in 'green tourism' in Hampshire's National Parks are likely to ensure that the county's economy can continue to benefit from tourism.

Abbreviations:

ABI: Annual Business Inquiry

IPS: International Passenger Survey

LDVS: Leisure Day Visits Survey

UKOS: United Kingdom Occupancy Survey

UKTS: United Kingdom Tourism Survey

Further information can be found at:

<http://www3.hants.gov.uk/tourism>

<http://www3.hants.gov.uk/tourism-section>

<http://www.visitengland.org/insight-statistics>