



Economic Impact of Wiltshire's Visitor Economy 2017

This paper gives a summary of key points from the South West Research Company's report into The Economic Impact of Wiltshire's Visitor Economy 2017.

	2011	2012	2013	2014	2015	2016	2017P
Staying Trips	1.5m	1.7m	1.7m	1.8m	1.84m	1.91m	1.94m
Staying Spend	£269m	£321m	£339m	£355m	£368m	£378m	£395m
Day Visits	17.9m	18m	18m	18.1m	17.7m	18.8m	18m
Day Visitor Spend	£549m	£638m	£641m	£646m	£668m	£701m	£678m
Visitor Spend	£859m	£959m	£980m	£1.0bn	£1.04bn	£1.08bn	£1.09bn
Tourism Turnover	£1,130m	£1,422m	£1,455m	£1,470m	£1,530m	£1.5bn	£1.5bn
Number of jobs	21,000	27,500	28,000	28,000	29,000	29,000	29,000
Estimate GVA	£638m	£799m	£817m	£826m	£860m	£875m	£875m

- 2016 was the 5th record year in a row for Wiltshire tourism. With records being set across all main economic indicators.
- Wiltshire's visitor economy is now worth £1.56bn (+3%) per annum and supports over 29,000 jobs.
- Wiltshire attracted a record 1.9m staying visitors in 2016 (+4%), spending a record £378m (+3%).
- 10.1% of all visitors now stay overnight in Wiltshire, compared with just 8.3% who stayed overnight in 2011.
- The total value to Wiltshire's economy and GVA have increased by 37% since 2011 to £1,557m and £875m respectively.
- Wiltshire's 18.8 million day visits generated £701m in day visitor expenditure.
- Average spend per person per visit remains at similar levels to previous years:
 - UK staying visitors stay for an average of 2.7 nights, spending £169 per person per visit.
 - Overseas staying visitors stay for an average of 6.0 nights, spending £350 per person per visit.
 - Day visitors spend an average of £37 per person per visit.

- Overseas visitors make up just 19% of all staying visitors, but 42% of all nights, and 39% of all staying visitor spend.
- Domestic staying visitor spend remained at a similar level to 2015 compared to a 5% decrease nationally. Overseas staying spend increased by 10% compared to a 1% increase nationally.
- The proportion of South West England staying spend occurring in Wiltshire has grown from 5.42% in 2011 to 6.61% in 2016 (6.46% in 2015). Or a SW market share gain of an additional £68m direct staying visitor spend per annum.
- Total visitor spend increased by 4% from £1.04bn in 2015 to £1.08bn in 2016.
- Serviced accommodation was used by 45% of staying visitors with a further 40% choosing to stay in the home of a friend or relative.
- Holiday (64%), visiting friends and relatives (18%) and business (16%) were the main purpose of the majority of trips to the county. Holiday trips increased by 11% compared to 2015.
- Wiltshire continues to perform poorly in attracting business visits and events. 2016 saw 311,000 business tourism visits. This is 9% down on 2015, and 26% down on the 423,000 visits in 2011.
- Of the approximate £1.08bn direct visitor expenditure in the county 12% was spent in the accommodation sector, 25% on shopping, 35% on food & drink, 13% on attractions and entertainment and 14% on travel and transport within Wiltshire.