



**VisitWiltshire Board Meeting, Bishopstrow Hotel
16 October 2019**

**Board Paper for Information
*Economic Impact of Wiltshire's Visitor Economy 2018***

Summary:

This paper gives headline results from the South West Research Company's report into the Economic Impact of Wiltshire's Visitor Economy 2018.

	2011	2012	2013	2014	2015	2016	2017	2018
Staying Trips	1.5m	1.7m	1.7m	1.8m	1.84m	1.91m	1.94m	1.89m
Staying Spend	£269m	£321m	£339m	£355m	£368m	£378m	£396m	£398m
Day Visits	17.9m	18m	18m	18.1m	17.7m	18.8m	18m	17.7m
Day Visitor Spend	£549m	£638m	£641m	£646m	£668m	£701m	£678m	£646m
Visitor Spend	£819m	£959m	£980m	£1.0bn	£1.04bn	£1.08bn	£1.1bn	£1.04bn
Tourism Turnover	£1.1bn	£1.2bn	£1.4bn	£1.4bn	£1.5bn	£1.55bn	£1.56bn	£1.5bn
Number of jobs	20,917	27,583	28,032	28,062	29,100	29,000	29,159	28,000
Estimate GVA	£638m	£799m	£817m	£826m	£860m	£875m	£877m	£842m

- Wiltshire attracted approximately 19.6m day and staying trips with a total direct visitor spend value of £1.04bn, a 3% decrease from the record year of 2017. This generated £1,499m of business turnover in the county supporting an estimated 28,000 tourism related jobs (8% of all employment overall, the same as in 2017).
- The decrease in visitor spend is largely as a result of the Salisbury attacks and a drop in urban day visits and spend, although there was also a decrease in urban day visit spend generally which is supported by many media reports of reduced spending in the UK high streets during 2018. This has subsequently meant small percentage decreases in related turnover and GVA.
- Whilst the employment numbers supported in 2018 are lower than in 2017, the ONS Annual Population Survey estimates that 4,300 fewer people were employed in the county in 2018 compared to 2018.

- Wiltshire received approximately 1.9m staying trips accounting for 6.2m visitor nights and £398m visitor spend with domestic visitors accounting for the large majority of staying trips (83%). All staying visitor trips decreased by 3% and nights by 1% compared to 2017 with spend remaining at a similar level. This is the first decrease in staying visitor trip volumes since 2013 with year on year growth between then and 2017.
- Overall performance for the former Salisbury district area in 2018 was estimated as; Staying visitor trips -3%, staying visitor trips -2% with no change in staying visitor spend. Day visits overall for the district were estimated at -8% and day visitor spend -11%, but this was driven by an estimated 25% drop in urban visits to the area (approximately 450,000 visits) likely to be linked to the incident in Salisbury City.
- Analysis of visitor nights by purpose of visit to the district estimate that holiday and VFR nights were 97,000 lower than in 2017 (holiday -41,000 and VFR -56,000) with business nights increasing by 78,000.
- The proportion of regional staying spend occurring in Wiltshire has grown from 5.42% in 2011 to 6.69% in 2018 and whilst this has dipped slightly from 2017 (6.77%) it has shown year on year growth in previous recent years (6.61 in 2016 and 6.46% in 2015). Whilst the percentage change is not large this still represents progress with 1% of all regional staying spend equating to approximately £59.5 million in 2018.
- The number of staying visits has increased from 1,546,000 (7.88% of all visits) in 2011 to 1,888,000 (9.62% of all visits) in 2018. An increase over the period of 342,000 additional staying visitors (+22%)
- Holiday (68%), business and visiting friends and relatives (14% each) were the main purpose of the majority of trips to the county. Holiday and business trips decreased by 2% compared to 2017 and visiting friends and relatives trips increased by 1%. Whilst the proportion of holiday trips has decreased slightly in 2018 it is still 11% higher than in 2014 when holiday visits only accounted for 57% of trips.
- Seasonality data suggests that June, July, August and December were the top months in terms of volumes of staying trips to Wiltshire. Trip volumes in the fourth quarter (Oct to Dec) have grown considerably from the base year of 2013 (+13%).
- Wiltshire received approximately 17.7m day visits generating £646m in day visitor expenditure. Day visit volume in 2018 was 2% lower than in 2017 and spend decreased by 5%. At a national level day visitor volumes decreased by 5%. In terms of seasonality day visits and spend were well spread across the year.
- Of the approximate £1.04bn direct visitor expenditure in the county 13% 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.
- Average spend per person per visit remains at very similar levels to previous years:
 - i. UK staying visitors stay on average 2.7 nights, spending £178 per person per visit.
 - ii. Overseas staying visitors stay on average 6.1 nights, spending £375 p/p per visit
 - iii. Day visitors spend an average of £36 per person per visit.