

Economic Impact of Wiltshire's Visitor Economy 2017

To: The Board
From: David Andrews, CEO

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Summary

This paper gives a summary of key points from the South West Research Company's draft report, *The Economic Impact of Wiltshire's Visitor Economy 2017*. *These figures are still provisional, the final report will be available in January.*

2017 was the 6th record year in a row for Wiltshire tourism, with records being set across all main economic indicators. This paper gives a summary of main indicators and key points highlighted in the draft report. These figures are still provisional pending some amends to national data sets. Final figures and the full report will be available in January.

	2011	2012	2013	2014	2015	2016	2017
Staying Trips	1.5m	1.7m	1.7m	1.8m	1.84m	1.91m	1.94m
Staying Spend	£269m	£321m	£339m	£355m	£368m	£378m	£396m
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	£1.1bn
Tourism Turnover	£1.1bn	£1.2bn	£1.4bn	£1.4bn	£1.5bn	£1.55bn	£1.56bn
Number of jobs	20,917	27,583	28,032	28,062	29,100	29,000	29,159
Estimate GVA	£638m	£799m	£817m	£826m	£860m	£875m	£877m

- Wiltshire attracted 20m day and staying trips with a record total direct visitor spend value of £1.1bn. This generated £1,56m of business turnover in the county supporting an estimated 29,159 tourism related jobs.
- In 2017 Wiltshire received approximately 1.9m staying trips accounting for 6.2m visitor nights and £396m visitor spend. Domestic visitors accounting for the large majority of staying trips (84%). All staying visitor measures are at record levels.
- Wiltshire received approximately 18m day visits generating £678m in day visitor expenditure. Day visit volume in 2017 was 4% lower than in 2016 and spend decreased by 3%. This reflects VisitWiltshire's focus on staying visits as well as the national drop in day visits
- The +29,000 tourism related jobs in the county in 2017 represents 8% of all employment.

- Despite the drop in day visits, 2017 saw small increases in total visitor related spend, total business turnover and GVA.
- The proportion of regional staying spend occurring in Wiltshire has grown from 5.42% in 2011 to 6.77% in 2017 and shows year on year growth in 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 £58.5 million in 2017.
- Holiday (70%), business (16%) and visiting friends and relatives (13%) were the main purpose of the majority of trips to the county. Holiday trips increased by 5% compared to 2016 and visiting friends and relatives trips decreased by 5%. As we have been successful in generating additional leisure business, the amount of business visits and events business as a percentage of all tourism business has fallen by over 25% since 2011
- Seasonality data suggests that May, August and December were the top months in terms of volumes of staying trips to Wiltshire.
- In terms of seasonality day visits and spend were well spread across the year.
- Of the approximate £1.07bn direct visitor expenditure in the county 13% was spent in the accommodation sector, 26% 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 for an average of 2.7 nights, spending £174 per person per visit.
 - ii. Overseas staying visitors stay for an average of 6.0 nights, spending £356 per person per visit.
 - iii. Day visitors spend an average of £37 per person per visit.