highways england

A303 Amesbury to Berwick Down

TR010025

6.3 Environmental Statement Appendices

Appendix 6.1 Annex 9 Tourism and visitor experience

Volume 6

APFP Regulation 5(2)(a)

Planning Act 2008

Infrastructure Planning (Applications: Prescribed Forms and Procedure) Regulations 2009

October 2018

HIA Annex 9: Tourism and visitor experience

Introduction

Some World Heritage properties, such as the Stonehenge, Avebury and Associated Sites WHS, attract significant tourism interest and form important tourist destinations. They may represent key vehicles for economic development and as public goods provide value for everyone.

Destination review

Although the Stonehenge Visitor Centre, the Stonehenge monument and the Stonehenge, Avebury and Associated Sites WHS are destinations in themselves, they are located in a wider area. This broader destination includes nearby villages and towns in Wiltshire, such as Winterbourne Stoke, Amesbury, Devizes and Salisbury. The iconic attraction forms a key 'gateway' to the South West, given its location adjacent to the A303, one of the arterial routes to the South West.

Climate and topography

The Stonehenge element of the WHS is located in rural Wiltshire, which experiences a temperate maritime climate. The topography of the WHS is rolling chalk grassland, with some shallow climbs to the low ridges which surround the 'Stonehenge bowl'. The Stonehenge monument is located in a relatively level plain, with low dips and rises.

Population profiles of region and local area

The Office for National Statistics (ONS) estimated the usual resident population in 2016 for the South West region of England as 5,515,953. The South West region was estimated to have a working age population (16-64 years old) equivalent to 61% of its total population.

In the Local Plan Amesbury Community Area (Amesbury East, Amesbury West, Bourne and Woodford Valley, Bulford, Allington and Figheldean, Durrington and Larkhill, Till and Wylye Valley) in 2016, the ONS' Small Area Population Estimates[1] indicated that the population was c. 34,000 people. The population of Amesbury was estimated at c. 11,000 people.

The Amesbury Community Area was estimated to have a working age population (16-64 years old) equivalent to 62% of its total population. This is broadly in line with the proportion in England at 63% and slightly higher than Wiltshire (60%) and South West England overall (61%).

---

1 It should be noted that the ONS (2017) Ward Level Mid-Year Population Estimates are experimental statistics.

England, the South West, Wiltshire and the Amesbury Community Area have an ageing population, with the proportion being of working age falling between 2011 and 2016. However, in Amesbury and the Study Area, the fall was sharper falling by 4 percentage points, whereas it only fell by around 2 percentage points nationally, regionally and in Wiltshire.

Visitor offer

English Heritage provides a formal visitor offer at the Stonehenge Visitor Centre, charging for access to Stonehenge from this entrance point. There are a range of types of domestic and international visitors, from groups on guided coach tours to independent visitors. Generally, groups will adhere to fixed itineraries focusing on rapid visits to key locations such a Stonehenge, while independent visitors will disperse across the landscape.

The Visitor Centre opened in 2013, part of the Stonehenge Environmental Improvement Project (SEIP). This project:

- Improved the landscape setting of Stonehenge, by reducing noise and visual intrusion from inappropriate structures and the closure of the A344 road.
- Significantly enhanced the visitor experience through the provision of improved visitor facilities.
- Enhanced the interpretation of the World Heritage Site and improved access to selected monuments.
- Enhanced the education/learning experience, thereby improving understanding of the WHS.

'At present visitors are concentrated on the 'honey pot' sites at Stonehenge and Avebury Henge and there is limited understanding by visitors of the extent of the WHS' (Simmonds and Thomas 2015, 118).

The Stonehenge Visitor Centre has an exhibition explaining the landscape, its history and features, five Neolithic houses furnished with replica Neolithic axes, pottery and other artefacts, an indoor café space and a gift shop. The exhibition contains nearly 300 archaeological objects, finds from Stonehenge and other nearby monuments, now displayed on site for the first time. All the objects are on loan from Salisbury Museum and Wiltshire Museum, Devizes. There is also a special exhibition space with a programme of changing exhibitions.

'The Stonehenge Visitor Centre is one part of the Stonehenge Museums Partnership which also includes new displays at the Wiltshire Museum in Devizes (opened in 2013) and Salisbury Museum (opened in 2014). English Heritage is committed to promoting the two museums to Stonehenge visitors as part of a strategy to bring wider economic benefits to Wiltshire.' (Simmonds and Thomas 2015, 119).

‘A shuttle system takes visitors from the Visitor Centre to the Stones, a distance of around 2km. A stop at Fargo Plantation allows visitors easy access into the Stonehenge Landscape managed by the National Trust. An orientation leaflet given to visitors on arrival shows the extent of the landscape, access gates and information points at key locations within the landscape and approximate walking times between key monuments.’ (Simmonds and Thomas 2015, 118-119).

The centre of the monument is not available for general visiting, but only for small numbers via the ‘Stone Circle Access’ scheme which runs before and after the normal visiting hours.

Much of the WHS apart from the Stonehenge monument is National Trust land which can be freely accessed from various entrance points. The northern area is currently a popular amenity for joggers based at Larkhill MOD base to the north, and resident dog-walkers. There is greater public access to land in farm business tenancies in the northern area. In the southern area, there are fewer permissive paths and more long-term agricultural holding tenancies. The WHS is in multiple private ownership and there is some intensive land use within or around the heritage assets, which presents challenges.

The National Trust runs a series of guided archaeological and wildlife walks through parts of the wider Stonehenge WHS landscape, has also provides downloadable self-guided walks of the Stonehenge landscape.

The Avebury part of the WHS, located c.24 miles (c.40km) north of Stonehenge, is managed by the National Trust on behalf of English Heritage. In contrast to the Stonehenge monument, it is relatively less crowded and visitors are able to wander freely through the site via numerous rights of way and permissive paths. Some parts of the henge and stone circle are sometimes temporarily fenced off as part of erosion control.

Opening times and entrance fees

For the Stonehenge Visitor Centre and stone circle, from 30 March 2018 to 29 March 2019, walk up entrance fees without gift aid for an adult are £19.50, a concession £17.60 and a child (5-17), £11.70. A family ticket (2 adults, up to 3 children) is £50.70. English Heritage and National Trust England members visit for free, as do local residents2. Overseas Visitor Passes to English Heritage sites are valid. Entrance to Stonehenge is now managed through timed tickets. Advance booking is

2 The agreement for free local access applies to c. 30,000 residents of the following areas: Town Council of Amesbury; the Parish Councils of Bulford, Figheldean, Durrington, Durnford, Woodford, Winterbourne Stoke, Shrewton, Orcheston, Tilshead, Winterbourne, Idmiston, Allington, Newton Toney, Netheravon; the Parish Meetings of Milston, Wilsford-cum-Lake, and Cholderton. Local resident’s passes can be picked up at Durrington Town Hall and Amesbury Library, on production of two forms of ID.

the only way to guarantee entry on the day and time of visitors' choice. Visitors also benefit from an advanced booking discount.

There is a 10% discount for groups of 11 or more visitors paying together and free entry for the coach driver and tour leader. There are free pre-booked self-led visits for schools and other learning groups. Pre-booked expert-led Discovery Visits for school groups are charged at £100 per session.

During peak times a £5 refundable car parking charge is collected on arrival. The £5 fee does not apply to English Heritage and National Trust England Members (providing you show a valid membership card) or those who book in advance. Capacity is regularly exceeded. There is little alternative formal car parking provision within the Stonehenge part of the WHS. This creates an issue for visitors who do not wish to go the Visitor Centre but would like to explore the wider WHS landscape, and for the National Trust who organise activities such as guided walks, tours and events in the Stonehenge landscape. (Simmonds and Thomas 2015, 180).

Spring and autumn opening times are 09.30 - 19.00 daily. Summer opening times are 09.30 - 20.00 daily. Winter opening times are 09.30 – 17.00 daily. There are restricted opening times during holidays. The site is closed on Christmas Eve and Christmas Day. In cases or extreme weather, access to the Stone Circle may be restricted or cancelled.

Pre-booked Stone Circle Access visits take place outside of the normal general admission opening hours, very early in the morning or late in the evening. They provide a unique opportunity to experience the stones up close are subject to very limited availability. Reasons for visiting include astronomy, corporate/VIP events, education group/school, meditation, military group, performing ceremony, photography/filming, remembrance, research, sightseeing/tourism and singing/drumming/music. Stone Circle access is priced at £38.50 for adults (16+) and £23.10 for children aged 5-15. Touching of the stones is not permitted. No person may touch, lean against, stand on or climb the stones, or disturb the ground in any way. Use of any oil based substances, incense, candles or naked flames is prohibited. No amplified music is permitted at Stonehenge or in the surrounding landscape, although acoustic instruments are normally permitted.

Admission is free to the stone circles and other prehistoric monuments at Avebury. English Heritage members have free entry to the Alexander Keiller Museum. The car park is pay and display, free to National Trust and English Heritage members. The National Trust charge admission fees for Avebury Manor Garden. A number of self-guided walking tours are available as a booklet from the NT. Volunteers from the National Trust provide guided walking tours for a modest fee.

Transport to the destination

The Stonehenge Visitor Centre is principally accessed by road (A303, A360 and A4361), either by tour buses, taxis, hire cars and private vehicles. The nearest train station is at Salisbury.

‘Stonehenge is a popular destination for coach tours. Over 60% of paying visitors travel to Stonehenge as part of a group.’ (Simmonds and Thomas 2015, 117). Tour buses run from outside Salisbury Station; however, a large proportion of tour buses start in London, providing day tours to Stonehenge which are often combined with rapid visits to a range of other historic attractions including Windsor, Salisbury, Bath and Oxford. The Visitor Centre has a coach park and a car park. This includes small and medium-sized tour operators, online ticket companies, hotels and concierge services, as well as large tour agencies who work outside London – both in the UK and internationally.

Avebury is readily accessed by car. It can be accessed by public transport, by bus from Swindon/Devizes and Calne/Marlborough. The nearest train stations served by buses are at Swindon and Trowbridge. The 87 mile (c.140km) Ridgeway National Trail runs from Avebury to Ivinghoe Beacon in the Chilterns. It can also be accessed on horseback on bridleways or by a network of quiet cycle routes.

The Wiltshire and Swindon Destination Management and Development Plan 2015-2020 notes that ‘The majority of visitors travel to Wiltshire and Swindon by car or coach. Wiltshire's rural areas ought to be easy-to-reach and the driving experience a positive one. Unfortunately capacity problems on the strategic road network can make the journey a challenge at certain times. They create a poor experience, may dissuade visitors and can hold back the competitiveness of the local visitor economy unless they are addressed. Specific issues for the visitor economy needing resolution include congestion, delays and flooding issues on the A303 main cross-county route from London to the South West, and a principal route to Stonehenge; the road also affects the setting of Stonehenge – this Plan supports improvements to the A303 […]’ (VisitWiltshire 2015, 42).

It also notes that higher spending international visitors travelling independently are more likely to rely on rail travel. ‘Fast and frequent services out of London could make Salisbury and Stonehenge more accessible to people living in and visiting London. Encouraging more visitors to arrive by train can help reduce road congestion during the peak summer months.’ […] ‘There is also a need to improve first impressions, welcome, orientation and information at many rail stations […] In the longer term, opening more stations to provide additional points of access and make it easier for visitors to explore Wiltshire without a car has the potential to make a significant additional contribution to the growth of the visitor economy.’ (VisitWiltshire 2015, 42).

Regarding the WHS, the Destination Management and Development Plan notes that 'The issues of access and connectivity are exemplified by the challenges for the WHS. To develop the growth potential of the WHS and make Stonehenge, Avebury and the WHS more widely accessible to visitors, the WHS has to strike a balance between meeting the needs of visitors, the environment and community interests […] Visitor-related issues which this Plan supports, include:

- Plugging of gaps in the off-road network where no paths exist, such as between adjacent villages and Stonehenge and Avebury
- Provision of safe road- crossing points for pedestrians and cyclists in the WHS, particularly on the A303 and A4
- Waymarking and interpretation further away from the honeypot sites to support dispersal and exploration of satellite sites
- Research and review of the feasibility of different ways to move visitors between the individual sites within the WHS and to other parts of Wiltshire.
- Options for further exploration include:
- The development of a commercial visitor bus service to link the WHS to the museums that have invested in WHS exhibitions in Devizes and at Salisbury;
- Improved weekend services from Marlborough to Avebury and a service linking Stonehenge and Avebury;
- Branding regular service buses that go to the WHS to make it easy for visitors, improve visibility of the service and by encouraging visitors to use these services help support their viability. (A branded bus has been used successfully at the Jurassic Coast WHS). ;
- Consideration of feasibility and impacts of park and ride provision for Stonehenge and Avebury, in the longer term; and,
- Identifying ways to improve access for disabled visitors; in a rural landscape this is likely to include virtual access.' (VisitWiltshire 2015, 44-5).

'Tourism is an important element of the economy of Wiltshire and the South West and the Stonehenge and Avebury WHS is fundamental to the tourism economy of Wiltshire. The WHS supports jobs, infrastructure and services which in turn benefit the local community […] The solution to the congestion on the A303 at Stonehenge and beyond will also affect the opportunities or otherwise to build on the economic benefits of the WHS.' (Simmonds and Thomas 2015, 117-118).

Current access arrangements

The Stonehenge Visitor Centre free orientation leaflet encourages visitors to explore the wider landscape, as does the 10-language audio guide and shuttle bus commentary. There is an audio tour app in English. The welcome leaflet notes that 'you can either walk or take a shuttle bus to the Stone Circle. You can explore the rest of the landscape on foot to discover many other ancient monuments in the World Heritage Site. Please take care near roads and keep to the designated paths at all times when walking on them'. 'The National Trust manages […] open permissive land. Explore burial mounds and wildlife on foot. Please keep within the designated path when walking on the road. ‘There are numerous access points across the National Trust land.’ (English Heritage n.d.).

The welcome leaflet notes that the Normanton Down Barrows are ‘not accessible to the general public and for safety reasons we do not advise crossing the A303 to view them’. It states that ‘dogs on leads are allowed around the outside of the visitor centre but not in monument field or on the shuttle bus. To protect livestock there are restrictions on dogs on National Trust permissive open access land.’

Regarding disabled access, the welcome leaflet notes that the path around the stones is accessible, weather dependent. The landscape is uneven in places and may be unsuitable for standard wheelchairs. There are accessible toilets, baby changing and accessible changing facilities at the Visitor Centre. Assistance dogs are welcome in all areas of the site open to the public.

The orientation leaflets and website cross-advertise partner museums Salisbury Museum and Wiltshire Museum in Devizes, encouraging visitors to ‘extend your trip and head to nearby Salisbury Museum and Wiltshire Museum in Devizes to carry on exploring the story of Stonehenge’.

Proposals to enhance the existing provision of access are in progress at the time of writing, as part of the Stonehenge WHS Interpretation, Learning and Participation Strategy (2010) and the development of the WHS Landscape Access Strategy and Sustainable Transport Strategy. These strategies will include necessary impact monitoring and management regimes:

- Increasing way-marked paths in both parts of the WHS to suit different visitor needs and those of local users to provide better access to the WHS as a whole, building on existing walks created by the National Trust on its land and using the established network of public rights of way.
- Linking cycling routes, including links to the Sustrans national cycle network, and providing cycling stands in key locations. The cycling charity Sustrans are unable to complete gaps in the National Cycle Network because of safety concerns for cyclists travelling along and crossing the A303. A Sustainable Transport Strategy is being developed.
- Provision of an ‘explore bus’ service and a shuttle service between Stonehenge and Avebury to enable exploration of the full extent of the WHS.
- Use of digital technology, on hand held devices and from computers at home, to enable access where physical access is limited. Replacement of stiles with gates wherever possible.
- Coordinating and providing access from surrounding communities providing accommodation to allow visitors to access the WHS on foot or by bicycle.
- Explore the possibility of establishing a walking route between Stonehenge and Avebury.

– Reviewing the WHS signage and information at key dispersal points should be undertaken in the light of the recommendations of the Stonehenge WHS Interpretation, Learning and Participation Strategy (2010) […]. (Simmonds and Thomas 2015, 13-134).

It is understood that the Phase 2 – Partnership Plan for National Trust and English Heritage Trust Land will explore opportunities and implications of improving access.

> ‘The objective of increased public access will, however, have to be balanced with the need to maintain working agricultural land, to protect archaeological sites and to create nature conservation sites. Increased recognition of the importance of the whole WHS will require an integrated approach that blends sound archaeological and land management with high quality visitor interpretation and access information. Improved access is only possible with the agreement of the landowners.’ (Simmonds and Thomas 2015).

Visitor dwell time

English Heritage recommend an average visit length to the Visitor Centre and Stonehenge monument of two hours, which provides sufficient time to explore the visitor centre, with its internal and external exhibitions and its greatly improved facilities, and to take the 20-minute round-trip journey to and from the Stone Circle by shuttle bus.

Stone Circle Access visits last for one hour, with a maximum of 30 people within the stones per session.

At Avebury, visitor pressure is concentrated on the stone circle and on Avebury village due to the location of the main visitor car park south of Avebury Henge. The National Trust reports a dwell time of between 1 and 2 hours, indicating that visitors are not exploring far beyond Avebury. Those who do, often drive between the monuments using the available car parking and lay-bys. (Simmonds and Thomas 2015, 181).

Visitor attendance data

England

Although attractions reported a 2% annual increase in total visits to visitor attractions in 2016, this is slower than in 2013 and 2014 when attractions benefited from a post-2012 London Olympics surge in overseas visits to attractions.

Overseas visits to attractions in 2016 declined by 3%.During the same period international visits to England actually increased by 4%, according to the International Passenger Survey. However, the average length of stay and average spend both reduced (down by 3% and 2% respectively), which may have limited attraction visiting.

Day tripper visits to attractions remained stable, with growth continuing at 4%. This was supported by growth in domestic holidays.

Other notable areas of decline in visitor admissions were London (-1%), the only region to report a drop (Visit England 2016a).

Gross revenue at visitor attractions increased by an average of 7% in 2016, higher than the 5% increase in each of the previous three years. No correlation was found between changes in adult admission prices and gross revenue in 2016, suggesting that some sites may have reached the tipping point in admission pricing, where visitor volume contracts as a result of increasing entrance fees. On average, adult admission fees at charging attractions increased by 6% in 2016, following price rises of 4% in each of the previous 3 years. This rise in adult admission fees in 2016 is significantly higher than the rate of inflation over the same period (Visit England 2016a).

Employment within the attractions sector was fairly buoyant in 2016, with at least three times as many attractions increasing their permanent and seasonal staffing levels as those reducing. This trend for growth looks set to continue into 2017, with 11% of attractions anticipating an increase in permanent and seasonal staff. The trend of recruiting unpaid volunteers is also continuing, with these staff up by 20% in 2016 and expectations for growth to continue at a similar pace in 2017 (Visit England 2016a).

South West

In the South West visitor numbers halved compared with the previous year (3% in 2016, down from 6% in 2015) (Visit England 2016a).

Wiltshire

'The VisitWiltshire Economic Impact Study published in 2014 using results from 2012 shows that Wiltshire attracted 18 million day visitors and 1.7 million staying visitors. Wiltshire's visitor economy generates £1.4bn and supports over 27,000 jobs.' (Simmonds and Thomas 2015, 117).

'Stonehenge […] has long been one of the top 10 major paid attractions at a national level. Alongside Salisbury Cathedral […] the stone circle is a key reason for visiting Wiltshire. VisitWiltshire's content, photography, video and social media activity related to Stonehenge are used extensively by VisitBritain in their overseas campaigns as a national icon.' (Simmonds and Thomas 2015, 117).

Stonehenge

Stonehenge is amongst the UK's leading visitor attractions, consistently ranking in the top 25 attractions (free and paid), and in the top 10 paid attractions (Table 1). Annual visitor numbers have increased substantially over the past decade.

The current rank of Stonehenge underlines its significance in a national context. The latest visitor number figures from the ALVA rank it 14th of all attractions that are either fully or partly paid for. It is 5th of all such attractions outside London.

Table 1: Stonehenge and other leading paid for attractions, 2017 (Source: ALVA)

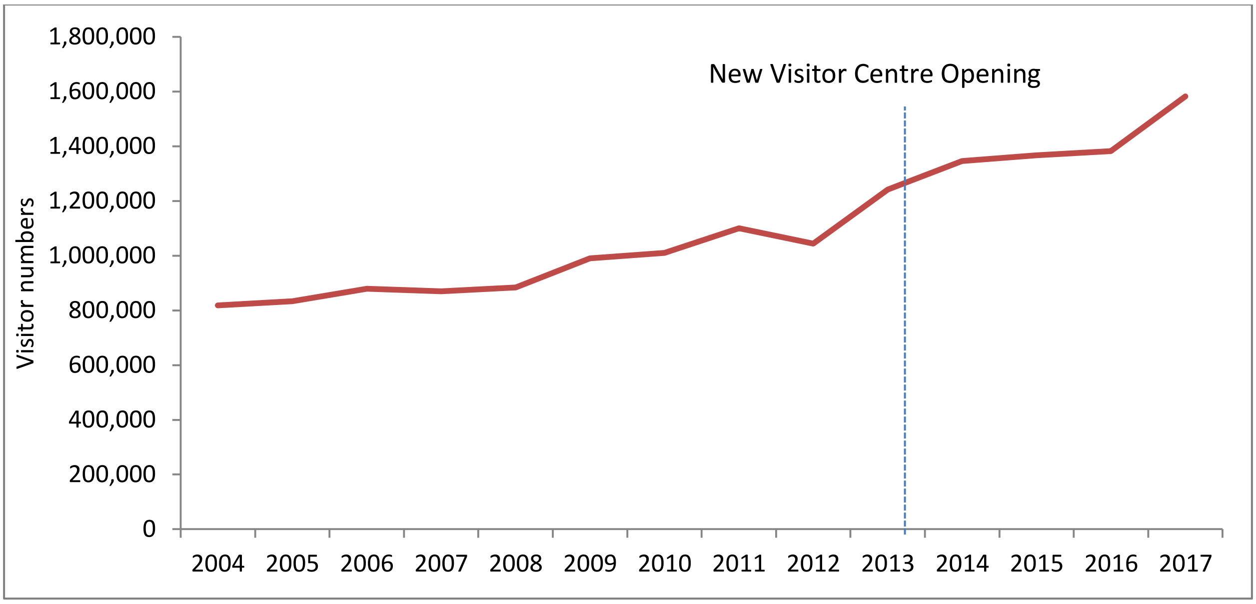
Attraction	Visitor numbers
Tate Modern	5.7 million
VandA South Kensington (free and charged)	3.8 million
Science Museum (free and charged)	3.3 million
Southbank Centre (free and charged)	3.2 million
Somerset House (free and charged)	3.2 million
Tower of London	2.8 million
Royal Museums Greenwich	2.6 million
National Museum of Scotland (free and charged)	2.2 million
Edinburgh Castle	2.1 million
Chester Zoo	1.9 million
Kew Gardens	1.8 million
Tate Britain	1.8 million
Scottish National Gallery (free and charged)	1.6 million
Stonehenge	1.6 million
St. Paul’s Cathedral (free and charged)	1.6 million
Westminster Abbey (free and charged)	1.5 million (estimated)

It is the most popular paid attraction in the South West, followed by the Roman Baths (Bath and North East Somerset Council), the Eden Project (Cornwall – The Eden Trust), Bristol Zoo Gardens (Bristol Zoological Society Ltd), Westonbirt (National Arboretum) (Gloucestershire – Forestry Commission), Stourhead House and Garden (Wiltshire – National Trust), Lynton and Lynmouth Cliff Railway (North Devon – Lynton and Lynmouth Lift Co.), the Lost Gardens of Heligan (Cornwall – Tremayne Estate and Heligan Gardens Limited), the Kingston Lacy Estate (Dorset – National Trust) and Tyntesfield (North Somerset – National Trust).

The calculation of visitor attendance numbers for the Stonehenge element of the WHS is difficult – although figures are available for the paid element of the attraction, there is limited information on the number of visits to open access areas of the WHS.

Between 2004 and 2017 Stonehenge doubled its attendance figures (Chart 1). As reported by Stonehenge management, the post-2013 figures show growth that is attributed to the new Visitor Centre, which opened in 2013. The growth achieved in 2017 is believed to be a reflection of an increase in inbound tourism into the UK. Over the entire period 2004 – 2017 average annual growth in attendance has been 5.4%.

Chart 1: Stonehenge visitor numbers (Visitor Centre only) (Source: ALVA)



The National Trust estimates the annual number of visitors to the Stonehenge landscape to be around 200,000 based on selective counts carried out at a number of entry points. However, this is likely to underestimate the number of people using the site since there is currently no mechanism for recording all individual users. The NT'S present gate counter figures indicate that only about 8% of visitors explore the WHS landscape south of the A303.

Avebury

The National Trust estimates that Avebury is visited by over 250,000 visitors each year.

Visitor characteristics

England

Across England, in 2016 more sites reported an increase (40%) in overseas visitors than a decrease (26%). However, at an overall level overseas visitors to attractions declined in by 3%. This is in contrast to 2015, when overseas visits increased by +4% (Visit England 2016a).

There is growth from the emerging markets, but VisitBritain says the current biggest mature inbound markets (such as the USA and Western Europe) will continue to dominate in value and volume to 2020 and beyond. The World Heritage Site is the main draw for international visitors to Wiltshire and Swindon (Visit Wiltshire 2015, 12).

Day tripper trends are more stable. Visitors grew by 4%, consistent with growth levels in the previous two years (Visit England 2016a).

South West

'Target international markets include Germany, France, Benelux, Italy, Spain, North America and Australia, travelling both independently and in groups.' (VisitWiltshire 2015, 19). Increased overseas visits were most prevalent in the South West, with a 9% increase in 2015/2016. The South West is a region which had experienced successive drops in the previous three years (-2%, -6% and -18%) (Visit England 2016a).

Local/day trip visitors in the South West increased by 7% in 2015/2016 (Visit England 2016a).

Stonehenge Visitor Centre and the World Heritage Site

'The Stonehenge and Avebury World Heritage Site (WHS) is a major asset to Wiltshire's visitor economy. Stonehenge is the most architecturally sophisticated prehistoric stone circle in the world and the flagship visitor attraction of the WHS […] Stonehenge brings international and national visitors to Wiltshire. The WHS includes Avebury, the largest stone circle in Europe, and in total the WHS comprises over 5,000 hectares of landscape - but many visitors to Stonehenge are unaware of the extent of the site.' (Visit Wiltshire 2015, 25).

English Heritage provided a range of headline data for this study which add further context and detail to these visitor numbers and the value of tourism to the facility. These are based in part on a visitor survey of 413 visitors carried out in 2016.

- Centre visitors are split 52% international and 48% UK based. Based on current (2017) figures, this would equate to c. 0.83 million international visitors and 0.77 UK visitors. This qualitative survey, however, was carried out among English speaking visitors only, therefore is likely to underestimate the proportion of international visitors.
- Day trips account for 24% of visitors, 17% report being on a short break and 58% are holiday visitors.
- A significant number of domestic repeat visits are reported (46% of survey respondents).
- Membership (English Heritage) visits account for around 20% of visits and are largely domestic visitors.
- Only 4% of the respondents were from the local area (Amesbury/Salisbury), a much lower share of the visitor mix than many other visitor attractions attract.

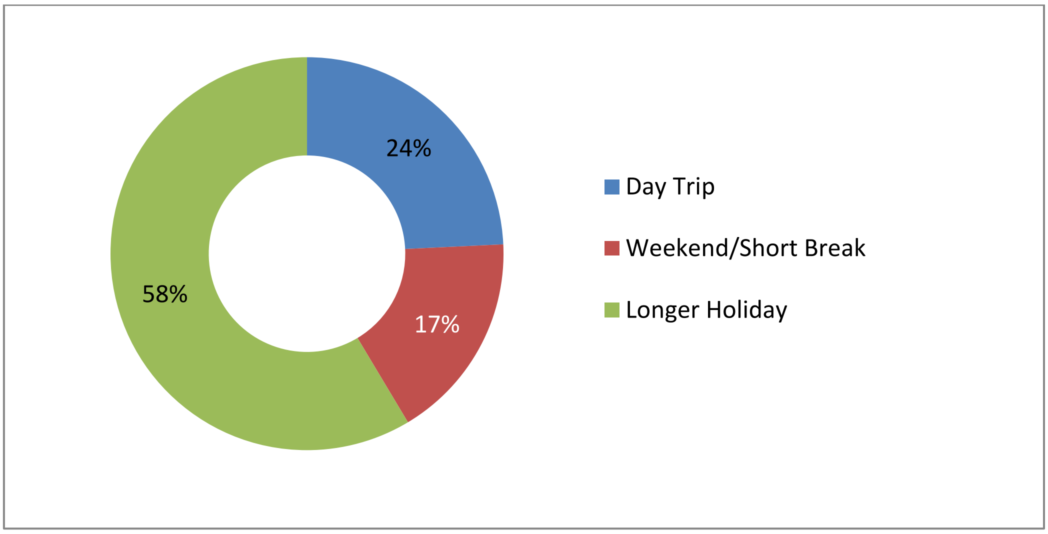
- English Heritage reports a younger demographic for Stonehenge visitors than other sites. 30% of visitors are aged 16-35, 36% are 35-54, 16% are 55-64 and 19% are aged 65+.
- Around 24% of Stonehenge visitors participating in the survey were accompanied by children.
- Visitor numbers peak from June to August, with paid entry data provided by English Heritage suggesting 100,000-115,000 a month in this period. April and May, and late August and September are described as shoulder months when paying visitor numbers fall to c. 65-70,000. November to March see numbers fall to 15,000-20,000.
- Educational visits from schools accounted for around 58,000 visits by children to the site (both free and paid for trips)
- 71% of visitors drive fewer than 2 hours to the site, 92% fewer than 3 hours, and the remainder more than 3 hours.

Given the Visitor Centre's rural location and lack of public transport options, a high proportion of visitors arrive at the site by car (66%) with 23% arriving by bus, the latter including group tour visits. The visitor survey reported 48% of international visitors arriving by car.

There is a growing number of FIT (Fully Independent Travellers), who do not use the booking/travel agencies and drive to the site by car. This is reflected in an increasing number of arrivals by car (48% of international visitors drove to the site, according to the survey).

English Heritage estimates that more than half of all visitors to Stonehenge visit while on a longer holiday. They also note that over time the proportion of those on day trips and short breaks is increasing (Chart 2).

Chart 2: Stonehenge Visitor Breakdown by Trip Type (Source: English Heritage)



No evidence is available to the study about group tour (travel trade) visitors. English Heritage reports typical patterns of visits as including destinations such as Windsor, Oxford and Bath, with Stonehenge part of a day visit to historic and heritage locations of this type. Businesses in the area point to group tours tied more explicitly to ancient heritage sites in the wider Wiltshire area, although not specific data was provided to the study.

No data are collected by English Heritage on linked visitor volumes or values for Amesbury or the wider local impact area that is the focus of this report. Nor is data available to the study on how the Visitor Centre, which represents a major visitor operation in the area, purchases goods and services including from suppliers in the local area.

These issues were explored in interviews undertaken to inform the Assessment of the Visitor Economy and Local Economy Benefits of the A303 Improvements. Responses highlighted the following features of current and past tourism activity linked to Stonehenge and the WHS:

A significant majority of current visitors to Stonehenge do so via the visitor centre and on part day or at the most day visits. A small proportion of these short stay visitors use facilities and services in Amesbury and the wider local impact area, but there is no evidence that these linked visits are monitored.

Some day visitors take in other Neolithic monuments including Durrington Walls and Woodhenge in the immediate area, although no visitor numbers were available to this study.

Some owner/operators of small accommodation businesses interviewed for the study suggest that up to 40% of their trade is directly linked to Stonehenge visits and the Visitor Centre in summer months. Our understanding is that the smallest accommodation providers may experience much higher rates linked to Stonehenge, particularly during peak visitor periods. One interviewee also pointed to the Visitor Centre opening having driven up staying trade.

Other factors driving visitor trade include the wider south Wiltshire tourism offer including Salisbury, business trips (particularly in larger hotels, but also in some smaller guest houses) and stopover stays for travellers using the A303.

Group tours to Stonehenge may use facilities in the surrounding area, with businesses on Solstice Park reported to be benefiting from coach parties making ‘holding’ visits ahead of time slots at the Stonehenge Visitor Centre. However, these do not typically involve overnight stays and no data is available on the frequency and value of these visits.

Anecdotally, a range of other destinations were cited in interviews as part of linked trips by day group visitors and individual visitors. These included Bath, Salisbury and Avebury.

The National Trust provided basic data from a small sample survey carried out in 2017.

- Users accessing the site from northern entry points are a mix of local communities arriving on foot (34%) and visitors arriving by car (64%) from a local area within a 30 minute drive time.
- Users arriving close to the monument field arrive by car (87%) with a journey time averaging 90 minutes. These are likely to be day visitors, although it is not clear whether these users have or go on to visit the Visitor Centre.
- Reported uses on the northern side of the WHS include 55% walking, running or jogging, 33% dog walking and 31% using the area with family or friends.
- Monument field visitors predominantly visit the site to see the stones (89%) but also other monuments in the area (43%) and to experience the landscape (29%).

There are a number of volunteer guided walks and National Trust Ranger-led events each year, although these numbers are small.

No National Trust visitor facilities are located on the WHS, and the Trust holds no data about how visitors are using the wider area around the WHS.

Visitor experience

English Heritage’s Phase 1 Visitor Survey involved 114 interviews with existing users of the Stonehenge Landscape, 121 interviews with residents and 107 interviews with users of the A303. The Phase 1 Visitor Survey aimed to increase understanding of visitor behaviour and motivations.

- Of visitors interviewed near the monument, 90% were on their first visit. 34% have/will visit other attractions on the day of their visit (14% Avebury; 11% Bath). There is very little use of the southern landscape by these visitors.
- Of visitors interviewed in the north of the landscape, 40% visit at least twice a week. 18% have/will visit other attractions on the day of their visit (4% Avebury; 4% Old Sarum). These visitors include those from the local community who are using the landscape but also those who have travelled from further afield – usually no more than 1.5 hours. The numbers visiting this area are likely to increase because of the Army Basing Programme. Military personnel already use the landscape for amenity and training and the site managers plan to engage further with them as part of their partnership plan.
- Of the local community, 85% have (ever) visited the Stonehenge Landscape. They make an average of one visit a week. 66% of locals have visited the Stonehenge monument area, 80% the north of the WHS and 74% the north-east of the WHS. 50% had visited the south of the WHS, south of the existing A303.

As indicated in Chart 3 and Chart 4 below, there were differences between the principal motivations of those visiting the Stonehenge monument and those visiting the wider landscape. Visitor responses reflect the World Heritage Resource Manual's ambition that 'The increasing emphasis on quality of life and well-being as the ultimate goals of development in global and national development agendas suggests that aspects such as creativity, spiritual fulfilment, knowledge and beauty might find their way into official statistics on social sustainability by making 'culture' and heritage legitimate and significant constituents of sustainable development' (UNESCO/ICCROM/ICOMOS/IUCN 2013).

Chart 3: Visit motivations in the Stonehenge landscape (Source: Historic England and NT)

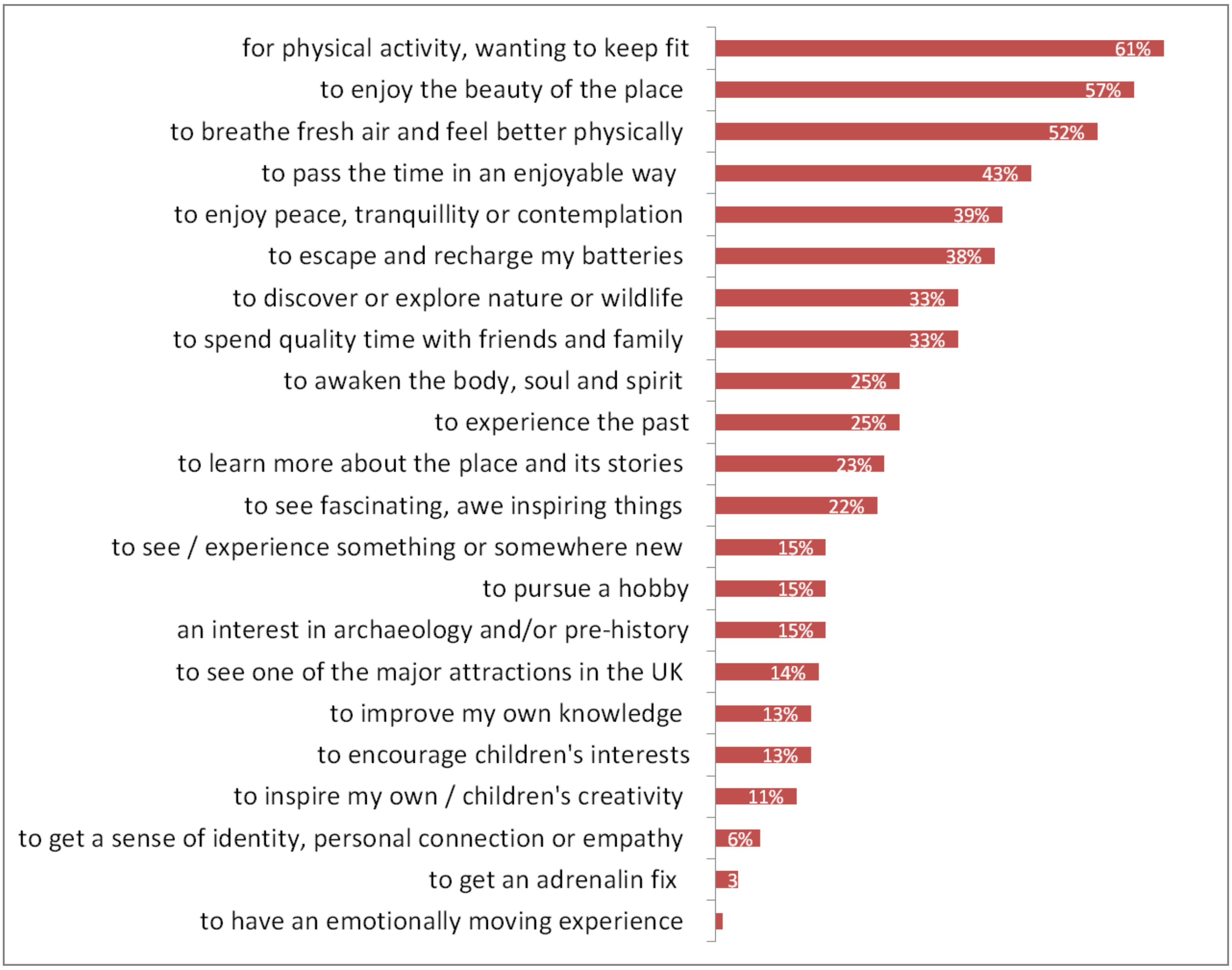
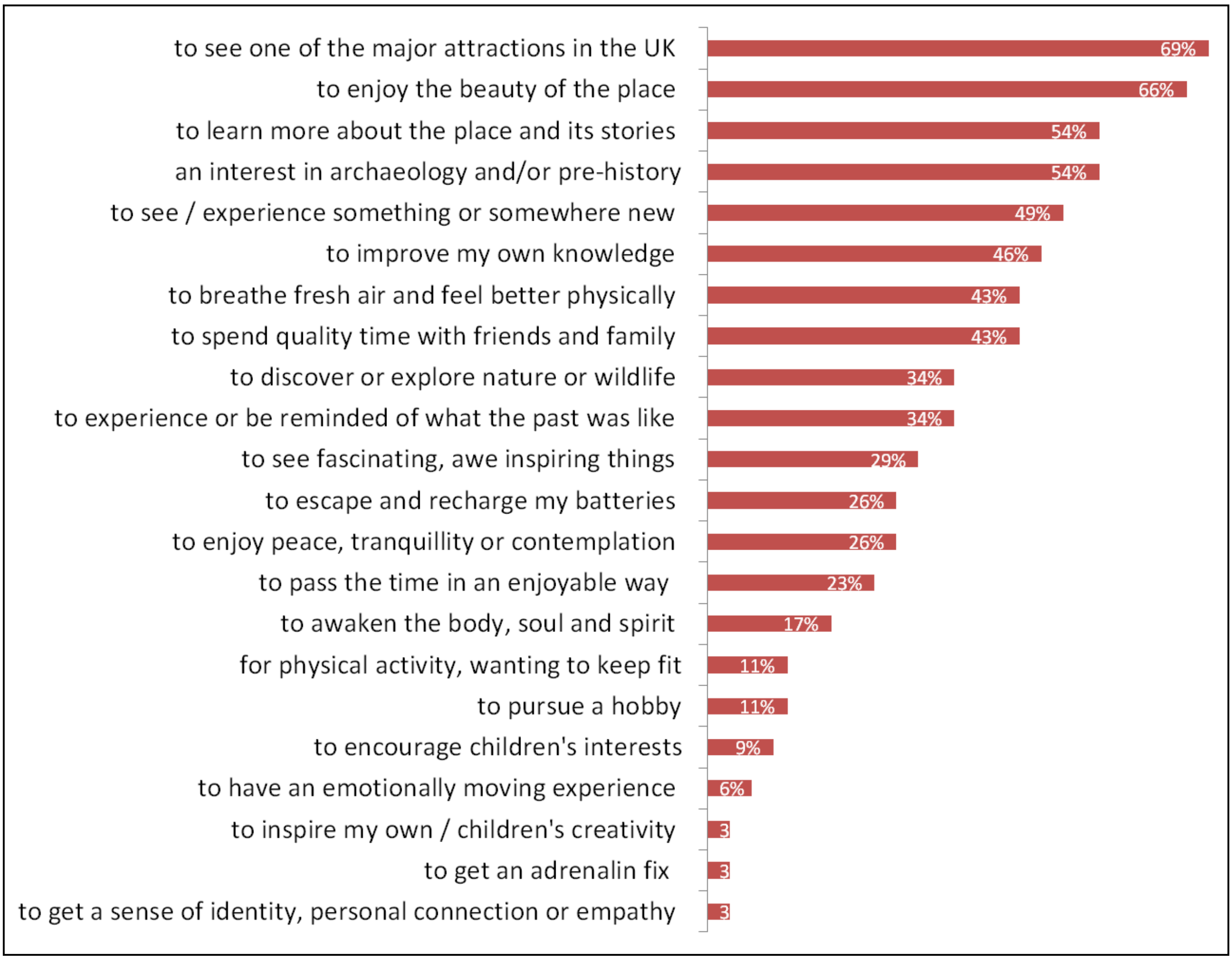


Chart 4: Visit motivations near the Stonehenge monument (Source: Historic England and NT)



Visitor management

Visitor management and sustainable tourism challenges and opportunities are addressed by specific objectives in the Stonehenge and Avebury World Heritage Site Management Plan 2015, which notes:

> 'Stonehenge enjoys a particular place in modern culture. Visitor numbers have grown rapidly, from around 500,000 visitors per annum in the late 1970s to c 1.25 million in 2013. Stonehenge is perceived internationally as a 'must see' attraction and around half of its visitors come from abroad. It is one of the most popular sites in Britain for visitors; indeed it is the most visited archaeological site in Britain. The Avebury 2005 Plan states that the site attracts around 350,000 visitors. Visitor figures are very difficult to assess on an open site. The last attempt to calculate visitor numbers was the Bournemouth University study undertaken in 1998. The Management Plan

recognises that this is an issue and there are a number of actions related to achieving a more accurate assessment of visitor numbers to the Avebury WHS in this Management Plan’ (Simmonds and Thomas 2015, 2.8.1).

‘The new Visitor Centre at Stonehenge and the redisplayed galleries at the Salisbury and Wiltshire Museums provide the opportunity for visitors to stay longer in the county which if strategically and carefully managed could deliver substantial economic benefits to Wiltshire.’ (Simmonds and Thomas 2015, 2.8.2)

‘There were seven priorities identified in the Stonehenge WHS 2009 Management Plan. Some of these have been met with major improvements in the visitor experience through the creation of the visitor centre and the significant enhancement of the setting and integrity achieved thorough the closure of the A344. Others have been partly addressed or are on-going remaining priorities in the current Plan period. Some key outstanding priorities remain including the minor extension to the Stonehenge WHS boundary and the reduction of the impact of the A303’ (Simmonds and Thomas 2015, 3.3.2).

A Limits of Acceptable Change model and Sustainable Tourism Strategy are currently in development by English Heritage and the National Trust which will address the question of how many people the Stonehenge element of the WHS can cope with and manage sustainably. Damage caused by footfall is being monitored by English Heritage and the National Trust and action taken as appropriate.

Too many visitors and congestion can have a negative impact on the visitor experience. Currently, visitors are asked to pre-book their visit to the Site which should result in less congestion during the high season but will reduce the number of people who will be able to make a spontaneous visit when travelling through the area. (Simmonds and Thomas 2015, 119).

Constraints on numbers of visitors to the site vary depending on the location of visitors. Too many visitors on earthworks and unmetalled paths may have a negative impact on the integrity of the physical fabric and setting of monuments. ‘More work needs to be undertaken to spread visitors more evenly across the WHS landscape so as to reduce the impact of visitors at key monuments’ (Simmonds and Thomas 2015, 133).

‘Many visitors come to the WHS to celebrate the Summer and Winter Solstices and other pagan observances. These observances require sensitive management by the many WHS partners involved to ensure the protection of the WHS and its attributes of OUV.’ (Simmonds and Thomas 2015, 118).

‘The Stonehenge monument is visited by over a million paying visitors each year, not including those visiting at the summer solstice, but this does not adversely affect its astronomical importance. The centre of the monument is not available for general visiting, but only for small numbers via the "Stone Circle Access" scheme which runs before and after the normal opening hours' (Chadburn and Ruggles 2017, 57).

The 2015 WHS Management Plan highlights the challenges of visitor and vehicle damage to visible and buried archaeology. Damage can be exacerbated by poor weather conditions. The 2012 Condition Survey noted that vehicle impacts included damage on tracks and ad hoc damage within fields. Areas of concern within the Stonehenge part of the WHS include BOAT AMES12 at Stonehenge, Normanton Down and elsewhere and the long barrow crossed by an access track on the Cursus (NHLE 1009132).

The development of new interpretation facilities at the Stonehenge Visitor Centre, which visitors are encouraged to explore prior to visiting the Stone Circle, aimed to improve the management of visitor flows, minimise dwell time and crowding at the most vulnerable points. The introduction of timed advance tickets has improved congestion. However, the increase in admission prices does not appear to have reduced visitor demand.

English Heritage reported that July is the peak month with the number of visitors to the Stonehenge Visitor Centre reaching 115,000. It regulates the number of online bookings available for certain time slots. The number of tickets available per day is limited, allowing for a maximum capacity of 8,000 – 9,000 people during the busiest day. This is reached during a few weeks in peak summer months.

The future operational growth potential of the attraction is limited by the environmental sensitivity of the WHS as well as the capacity of the existing amenities. Any increase in visitor numbers for the Stonehenge monument would only be possible in the shoulder and low seasons.

Destination marketing

'VisitWiltshire is a key partner in developing good relationships with other tourist attractions and services within the local area and ensuring that the economic benefit of the WHS spreads to the local community. VisitWiltshire partners with VisitEngland and VisitBritain. VisitWiltshire has an integrated marketing programme of consumer, trade and press activity […].' (Simmonds and Thomas 2015, 119).

English Heritage and the National Trust's Stonehenge Marketing Plan is a long term strategy that will become a part of the WHS Management Plan. The ongoing work emphasises the need for marketing and promotion approaches which better links Stonehenge and the wider WHS to the towns, villages and businesses in the surrounding area. An enhanced WHS experience should catalyse the coordination of marketing and promotion.

English Heritage and the National Trust recognise that partnership between them, other public sector bodies and the private sector will be critical to delivering an enhanced experience for visitors. Securing commitments to a new strategy and plans for the area, and putting in place the investment and planning to deliver this is a key priority.

According to English Heritage, the key Marketing Plan targets include:

- Engaging local communities, encouraging greater exploration of the wider landscape by local residents;
- Broadening the event programme, including thematic marketing campaigns, exhibitions, workshops (shoulder and low seasons only);
- Introducing various learning opportunities for school groups; and
- Strengthening partnership with museums, landmarks and attractions in Salisbury and Amesbury.

Tourism and economic trends

Trends in tourism

VisitEngland's study of Domestic Leisure Tourism Trends for the Next Decade (VisitEngland 2013) notes the following trends:

- Economics and Recession-Led Trends: A rising number of affluent and leisure-focussed older people, an increase in intergenerational family holidays and increasing ethnic diversity. Accommodation and travel options that can cater for people with reduced mobility will be in great demand. Although the economic downturn has boosted domestic tourism, consumer caution remains and habits of thrifty spending behaviour will persist.
- Information and Technology Trends – Visitors' access to information and their use of technology when researching, evaluating and booking their leisure trips – as well as their technology expectations whilst on those trips – is transforming tourism. This is driving a trend for last minute decision-making, reducing the certainty with which businesses can plan ahead. Sharing leisure activities on social media increases consumer exposure to different experiences, driving a shift in attitudes to leisure – the fear of missing out (FOMO). For many, the use of mobile devices will become an integral and immersive part of every aspect of their trip.
- Consumer Trends – A shift in ethical priorities from broad environmental concerns to a more holistic sustainability agenda, which includes businesses practices and provenance, with an increased emphasis on localism. Growing importance is given to cultural capital – learning new skills or acquiring knowledge. Technology is propelling an increase in the desire for bespoke services, real time feedback, unique experiences and authenticity. Leisure memberships, e.g. of English Heritage and the National Trust, are a growing trend due to the potential for savings and discounts and nurturing a sense of belonging.

- Tourism Trends – There is a growing practice of turning VFR (visiting friends or relatives) trips into leisure ones. An increase in active leisure trips is driven by a desire to be active and healthy. The countryside will benefit from health and active tourism. The importance of nostalgia tourism was echoed by the industry experts, who saw a link between nostalgia and consumer desire for authenticity and meaning – as well as something safer and more secure than the uncertain future.

Economic Forecast and Spending Power

In terms of the spending power in the UK tourist market, cost oriented leisure travellers are likely to consider domestic/regional holidays due to financial concerns. The segment will respond to value messages and although so-called middle to upper middle class visitors are considered to be opportunistic.

The economic performance of the UK's main source markets is always an important driver of visitor numbers. Short term forecasts for the Eurozone were upgraded several times during 2017 and the outlook for growth is moderate and stable.

The US economy is growing, although there is a divergence between spending growth and weaker income growth as well as a lot of uncertainty over tax and investment policies. Many emerging markets (China, India, much of South East Asia) continue to grow at a rapid pace and others (Russia, Brazil) have emerged from a recession. The Middle East is hampered by much lower oil prices than those seen a few years ago but growth forecasts for 2018 are generally more positive than in 2017.

Political stability: Brexit

The impact of Brexit and the 2018-2019 transition period remain key sources of uncertainty for the international tourist market forecast. VisitBritain has continued to track consumer sentiment towards Britain since the referendum, with the latest research conducted in September 2017. According to the 2018 Inbound Tourism Forecast, the survey

> '[…] reveals that for most potential European visitors, Brexit does not affect their decision to travel to Britain for leisure. Furthermore, most Europeans still see Britain as a welcoming destination – and agree that the exchange rate means that now is a good time to visit. However, likelihood to visit has fallen since our research in August 2016. As we approach the date of Brexit, sentiment about Britain and concern about post-Brexit travel practicalities are downside risks for the forecast' (VisitBritain 2017).

The Tourism Alliance (the trade association for tourism related businesses), collected a range of industry responses to the result of the EU referendum on 23 June 2016 (Tourism Alliance 2016).

The UK head of leisure for KPMG UK stated that the decision would impact the hospitality industry, a key part of the tourism industry:

> ‘Not only are there vast numbers of EU nationals working in the hospitality sector, but EU supplier and commercial contracts will need to be reviewed, and there will also be concerns over foreign visitor numbers within the industry. On an economic level, it’s fair to predict that today’s result will probably impact consumer confidence, driving down discretionary spend on leisure in the short to medium term while consumers evaluate the full impact of what the UK’s exit from the EU means for them and their wallets.’ (Tourism Alliance 2016).

The director of the Tourism Alliance said that as seen in 2008 domestic tourism will likely rise, with both inbound and outbound tourism also affected:

> ‘Domestic tourism will increase due to the fall in sterling combining with people’s uncertainty and concerns regarding the UK economy and their employment status. Conversely, the outbound industry will struggle for the same reasons […] Meanwhile the inbound tourism industry will benefit from the fall in sterling and possibly the significant coverage the UK is receiving in the overseas media. So, bottom line, expect ‘Staycation 2’, at least in the short-term.’ (Tourism Alliance 2016).

The chair of the British Hospitality Association (BHA) and director of Merlin Entertainments noted that the UK’s decision to leave the European Union could actually bring an influx of visitors based on the weakened value of the struggling pound.

The director of the ALVA raised concerns that the UK’s decision to leave the European Union could have a significant effect on funding for cultural organisations, while also painting an unwelcoming picture for potential inbound visitors.

> ‘Our arts and culture organisations in the UK are heavily dependent on EU funding for some of their capital projects and programmes […] That money won’t be necessarily replaced by the UK exchequer so the next couple of years are important in terms of planning to replace some of that really important income for some of our most important visitor attractions. Different organisations will see this in different ways. From ALVA’s point of view, we’ve been very clear that we wanted to remain in the EU for those arts, culture, tourism and economic benefits.’ (Tourism Alliance 2016).

Political stability: Terrorism

The impact of terrorism and incidents is also difficult to calculate, and subject to volatility. On 1 March 2018, the Joint Terrorism Analysis Centre (JTAC) indicated a severe threat level for the UK from international terrorism and in Great Britain, a moderate threat from Northern Ireland-related terrorism (MI5, May 2018). There may be visitor perceptions that London is not safe, which may boost rural tourism.

Visitor economy

A full assessment of the Visitor Economy, including details of methodology, sources and statistical detail, is presented in the Assessment of the Visitor Economy and Local Economy Benefits. The following section summarises key baseline data.

Tourism context

Economic values can be linked to tourism income or other income-generating activities and the extent to which the site contributes to the local, regional and national economy. Tourism is one of the UK's most important industries, directly responsible for 1.6 million jobs at all entry levels throughout the UK. Those sectors related to tourism account for 3.1m jobs in the UK, approximately 1 in 10. (DCMS 2016).

Tourism is an important contributor to Wiltshire's economy. The most recent data for the county, produced by the lead strategic body Visit Wiltshire, puts total tourism supported business turnover at £1.6 billion in 2016 and direct visitor spend at £1.9 billion (the latest data for which such figures are available), with 18.8 million day visits to the county and 6.2 million staying visitor nights. The tourism industry accounted for an estimated 29,000 jobs in 2016. The visitor economy accounts for around 11% of total employment in the county. (Visit Wiltshire 2018).

The pattern of visitor numbers (trips) in Wiltshire is consistent with that of the national picture. After falling during the recession and several years of largely static figures, the past 3-4 years have seen recovery in staying visitor numbers, although on several volume and value measures they have not returned to pre-recession levels seen in 2006. This has been driven by domestic staying visitors, with overseas visitor trips reported as largely static. However, the combined staying visitor trip figures have reached a level that now exceeds a pre-recession peak in 2006.

On the key tourism value figures, the trend is more clearly upwards post-recession both for domestic and overseas staying visitors. Day visitor spend pre-2011 are not available in Wiltshire's most recent data analysis, but post-2011 data show a clearer upward trajectory post-recession.

Other relevant headlines from Visit Wiltshire's research include:

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.

Of direct visitor spending in the county, in 2016 12% was spent in the accommodation sector, 25% on shopping, 35% on food and drink, 13% on attractions and entertainment and 14% on travel and transport.

Total employment in the tourism sector (direct and indirect) is estimated at 29,200 in 2016, an increase of c. 8,200 compared with 2011 equating to a very strong annual growth rate of 7%.

Trips and overnight stays both peak in July and August, with the December Christmas vacation period also seeing higher figures compared with the remainder of the year.

Local business economy

The Amesbury Community Area performed strongly on key labour market indicators, and outperformed the county, regional, and national rates. In terms of sectors, Amesbury and the Study Area have a much higher concentration of workers in the professional, scientific and technical sectors. The Study Area’s relative concentration of this sector is 3.65 times higher than England and 5.03 times higher than the South West in terms of employment. This is largely (88%) made up of employees in the scientific research and development sectors.

The largest sector in terms of enterprises is the professional, scientific and technical sector with 18% of businesses in the Study Area. This sector has also seen strong growth, recording 6% annual growth between 2012 and 2017 in terms of business numbers – indicating new businesses forming in the area. Other large sectors in terms of the business base include wholesale and retail (12%) and construction (8%).

The agriculture, forestry and fishing sector, is also large, representing 12% of the Study Area’s business base which is to be expected given the rural nature of much of the Study Area and the tendency of agricultural businesses to be very small and geographically tied and defined, such as farms.

Though it only represents 1% of the businesses in the study area, the public administration and defence sector—which within the context of the Study Area is highly likely to be defence-related businesses tripled the number of enterprises in the Study Area from 5 in 2012 to 15 in 2017.

Overall, the Study Area has recorded positive business growth, with 16% growth in the number of businesses between 2012 and 2017 – at a rate of 3% per annum.

Key employment sites in the vicinity of the scheme comprise Solstice Park, dominated by larger manufacturing and distribution uses with some smaller, local light industrial occupiers; MOD Boscombe Down, an established military aircraft testing site; and Porton Down, which includes the Defence Science and Technology

Laboratory (Dtsl – an agency of the MOD), Public Health England (PHE), and the Tetricus Science Park.

Visitor economy: employment and the labour force

2016 ONS data indicates 700 employee jobs in the visitor economy in Amesbury town, and 1,800 in the wider local impact area. When retail jobs are added, the figures rise to 1,245 employee jobs and 1,300 total jobs in Amesbury town, and 2,525 and 2,625 in the wider impact area. The visitor economy accounts for c. 14% of Amesbury's employment and 11% in the wider impact area. This compares with average figures of 11% for Wiltshire and the UK respectively. When combined with retail, the equivalent figures are 24% of total employment in Amesbury and 16% in the wider local impact area.

Food and drink jobs account for the majority of visitor economy employment both in Amesbury and the wider local impact area. This figure includes pubs, restaurants, cafes and takeaways, and so includes the cluster of businesses on Solstice Park and businesses in Amesbury town centre which primarily serve local residents rather than visitors to the WHS.

The effects of recession which began in 2008 saw a contraction in employment levels followed by slight recovery then a period of low growth in 2011 – 2012. Exit from recession, which took hold in 2013 is evident in the figures, with the recovery gathering strength in 2014. Growth from 2015-16 is probably indicative of the upward trend post-recession.

Over the whole period 2009 to 2016, from a low base visitor economy grew substantially in Amesbury at 3% per year or 22% overall change. Including retail figures takes these higher with compound annual growth of 4% between 2009 and 2016 to a total of 31% growth in visitor economy and retail employees in Amesbury.

The significant uplift in employment from 2013 is attributable to several factors. The data shows that growth in that year was driven in restaurants and café employment and the operation of historical sites and buildings and similar visitor attractions: this almost certainly is due to the opening of the Stonehenge Visitor Centre. More generally it reflects the UK's exit from recession which took hold in 2013.

'The WHS offers the opportunity of employment related to tourism and conservation and management of the historic environment, as well as visitor welcome, retail and catering roles. It could offer opportunities for apprenticeships in these areas.' (Simmonds and Thomas 2015, 2.8.3)

Visitor economy: businesses

There were 115 visitor economy enterprises in the local impact area in 2017 and 25 in Amesbury. When retail business is included this rises to 200 and 45 respectively.

In Wiltshire overall, the latest data shows there are 1,875 enterprises in the visitor economy, rising to 4,665 including visitor economy and retail.

In Amesbury between 2010 and 2017, the net number of businesses in the visitor economy appears to have been static, with growth of 15% in the visitor economy and retail combined. In the wider local impact area growth in the visitor economy appears to have been stronger (13%) over the same period.

In Wiltshire overall, the number of visitor economy enterprises grew by 1% per annum over the course of 2010 to 2017, or by 5% in total. This suggests that the wider Wiltshire visitor economy performed better than Amesbury, but not the local impact area over the period.

Visitor infrastructure

'There is little evidence of the attraction having any real economic benefit for Amesbury or the surrounding villages. The presence of linked trips or tourists deciding to stay in the surrounding villages is all but absent.' (Wiltshire Council 2015, 79).

'The Visitor Accommodation Futures Report, published July 2014, undertook a detailed audit of the volume and performance of visitor accommodation in Wiltshire and Swindon. The report recommends investment across all types of serviced and non-serviced accommodation to tackle under-provision and to address capacity issues during the summer peak months, across the county […]' ' (Visit Wiltshire 2015, 39). The report indicated that there were c. 2,000 bedrooms in hotels ranging from 5* to budget hotels across the county. The study identified a further 3,800 guest accommodation units including inns/pubs with rooms, BandBs, self-catering accommodation, lodges, caravan/camping/glamping pitches and youth hostel places. The 2014 report shows hotel occupancies in 2013 of 70-80% for 3-star hotels in Amesbury and 75-80% for budget hotels in Amesbury.

'Food and drink is an important part of Wiltshire's economy; tourism provides an excellent way for the County to showcase its produce. Food and drink is one strand of the rural tourism experience and should be celebrated as part of local culture. It is also an essential part of visitor spend. Foodies will create a day trip or a short break around a destination restaurant or food experience. Around 9% of visitor expenditure in Wiltshire and Swindon is on food and drink compared with 13-23% in other Counties in the South West. This indicates there is room for improvement and growth potential.' (VisitWiltshire 2015, 34).

In terms of training and support to the visitor economy, priority areas for SMEs working in the visitor economy have been identified as marketing, online marketing and business management (VisitWiltshire 2015, 50).

Resident and tourist markets

In order to assess the attendance potential for the WHS including the Stonehenge Visitor Centre and potential impacts of the proposed scheme, there is a requirement to understand the markets that drive attendance, namely the available resident market and tourist market.

This section considers the size of the markets that are available to the visitor attraction to draw on. It estimates the historic and baseline current market size.

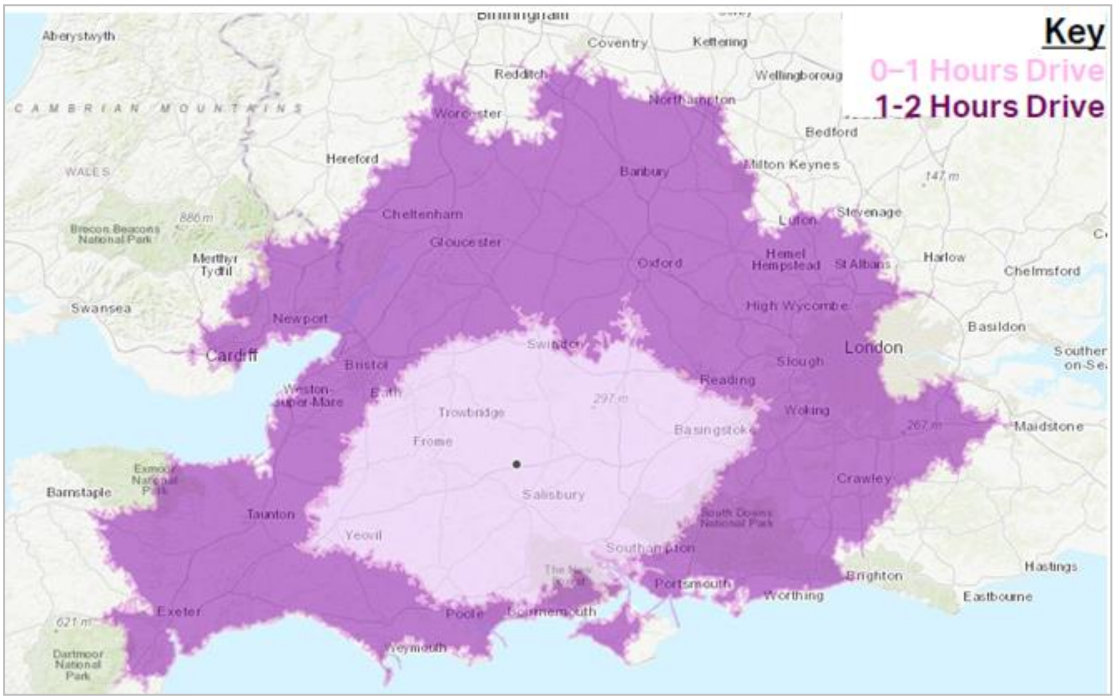
Resident Market

In general, visitor attractions draw residents living up to two hours away. Visitors who live beyond the two-hour drive time catchment area are likely to stay in the area overnight and are therefore considered either domestic or international tourists, as appropriate.

Due to the diminishing propensity to visit leisure destinations as drive-times increase, the resident market is sub-divided into a primary (residents living within 0-60 minutes) and a secondary market (residents living within 60-120 minutes).

The one-hour drive time isochrone includes 16 counties, covering almost the entire territory of Wiltshire, around 87% of Southampton and 80% of West Berkshire. The two-hour drive time catchment area covers a large proportion of Devon, West Sussex, Surrey, Hertfordshire, Gloucestershire and parts of Greater London. In total, Stonehenge can draw on a sizeable resident market of about 17.2m (2016).

Plate 1: Stonehenge drivetime isochrones (Source: AECOM/ArcGIS)



Historic and Current Market Size

Table 2 shows the size of the available resident market population within both drive time isochrones. As displayed, the available primary resident market accounts for 2.6m. The secondary market is much larger and totals 14.6m. Overall the total resident market had an average growth rate of 1.0% per annum between 2000 and 2016. Within this, the secondary market with its greater urbanisation had a slightly higher growth rate than more rural primary market.

Table 2: Stonehenge historic resident market (Note: numbers are rounded) (Source: AECOM/ArcGIS)

Catchment Area	2010	2012	2014	2015	2016	CAGR 2010-2016
Primary	2,489,400	2,526,700	2,562,200	2,580,300	2,598,700	0.72%
Secondary	13,748,400	14,040,700	14,328,400	14,488,900	14,637,900	1.05%
Total	16,237,800	16,567,400	16,890,600	17,069,200	17,236,700	1.00%

Future Market Size

In our analysis we have used the population projections at county level and applied the relevant catchment area percentage for each county. Official forecasts published by the Office for National Statistics expect the population to grow marginally over the next decade. This will result in around 19 million residents in the total catchment area by 2030. Similar to the historical trend, the projections, shown in Table 3, suggest a slightly higher growth rate in the secondary market, compared to the primary market, caused by ongoing urbanisation.

Table 3: Stonehenge resident market projections (Note: numbers are rounded) (Source: AECOM/ArcGIS)

Catchment Area	2017	2019	2020	2025	2030	CAGR 2017-2030
Primary	2,612,500	2,645,300	2,661,200	2,741,900	2,815,000	0.58%
Secondary	14,514,200	14,771,100	14,900,200	15,560,500	16,232,700	0.86%
Total	17,126,700	17,416,400	17,561,400	18,302,400	19,047,700	0.82%

Resident Education Market Analysis

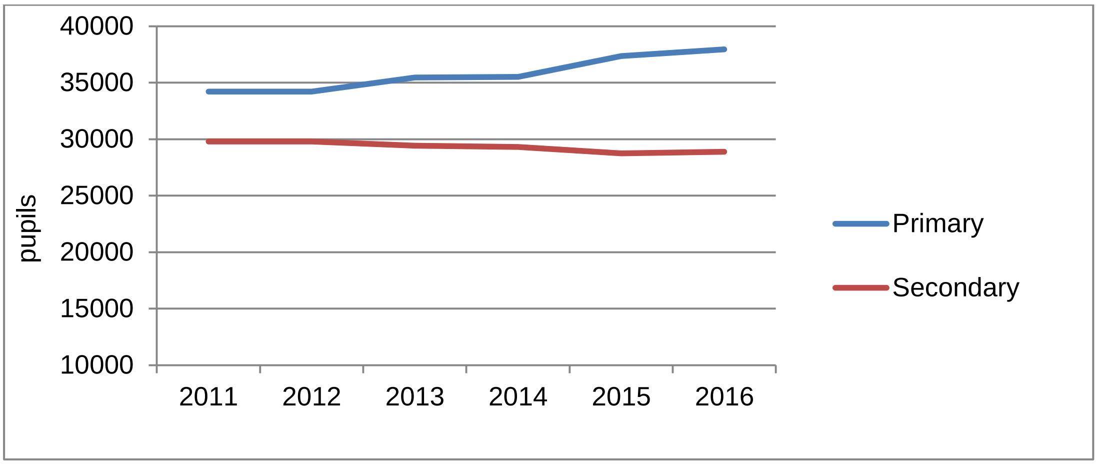
The education market forms an important component of attendance to Stonehenge. As of May 2017, there are 153 schools and 86 academies in Wiltshire. Table 4 provides a breakdown of schools in Wiltshire by category.

Table 4: Wiltshire – Breakdown of schools by type (Source: Wiltshire Council Strategy for School Places 2022)

Category	Primary
Primary	202
Secondary	31
Special	6
Total	239

Chart 5 shows that there has been an increase in Wiltshire's school population since 2011. According to the Wiltshire Council Strategy for School Places 2022, "the growth has been more significant in the primary phase for the past few years however that growth is now moving into the secondary phase with the requirement to expand secondary school places".

Chart 5: Wiltshire school population dynamics (Source: Wiltshire Council Strategy for School Places 2022)



English Heritage is a charitable organisation and the provision of education is a foundational goal of the charity. Annually, approximately 58,000 school children visit Stonehenge as part of an educational visit. This includes a combination of free education visits as well as enhanced paid 'Discovery Visit' (expert-led sessions with a lecture). Together, these represent around 5% of total visits.

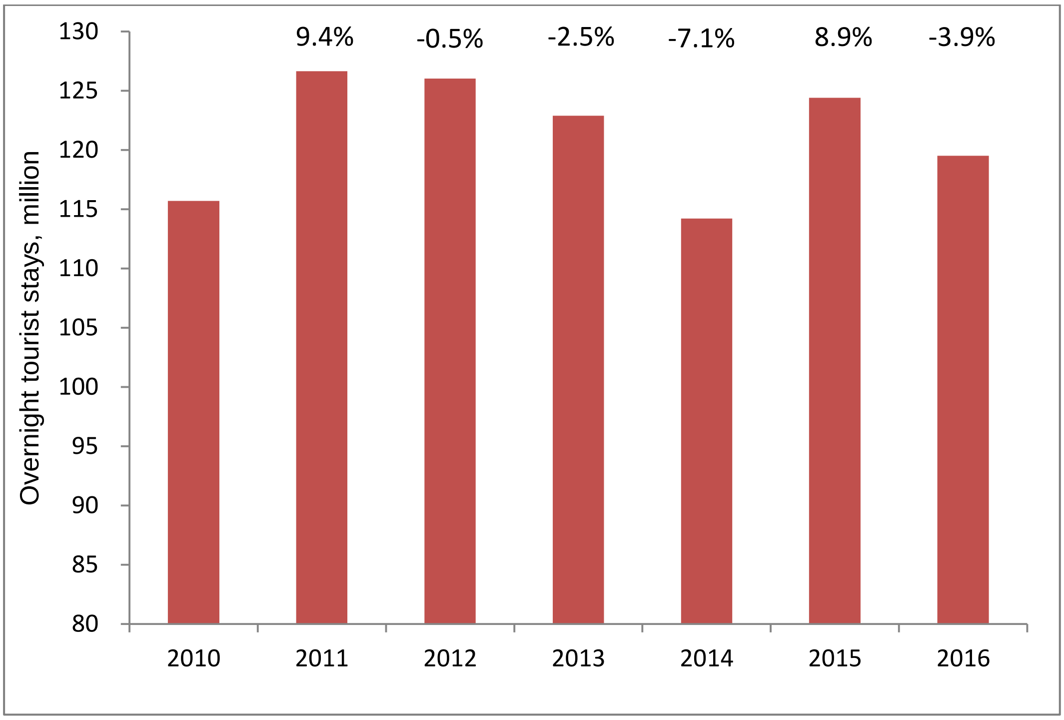
Tourist Market

A tourist is defined as a visitor staying overnight away from their place of residence. For the purpose of this report, we consider tourists within a one-hour drive time isochrone of Stonehenge. We subdivide the tourist market into domestic tourists and international tourists as their motivations and behaviours are significantly different from each other.

Domestic Tourist Market Analysis

Chart 6 below presents the dynamics of domestic overnight trips in the United Kingdom from 2010 to 2016. Although a fluctuating trend since 2010, it is marginally positive with a CAGR (Compound Annual Growth Rate) of 0.5% in this period. As shown below, after two years of decline, 2015 recorded a substantial increase of approximately 9%. Visit Britain attributes this to low inflation, real-term wage increases and a more favourable economic environment.

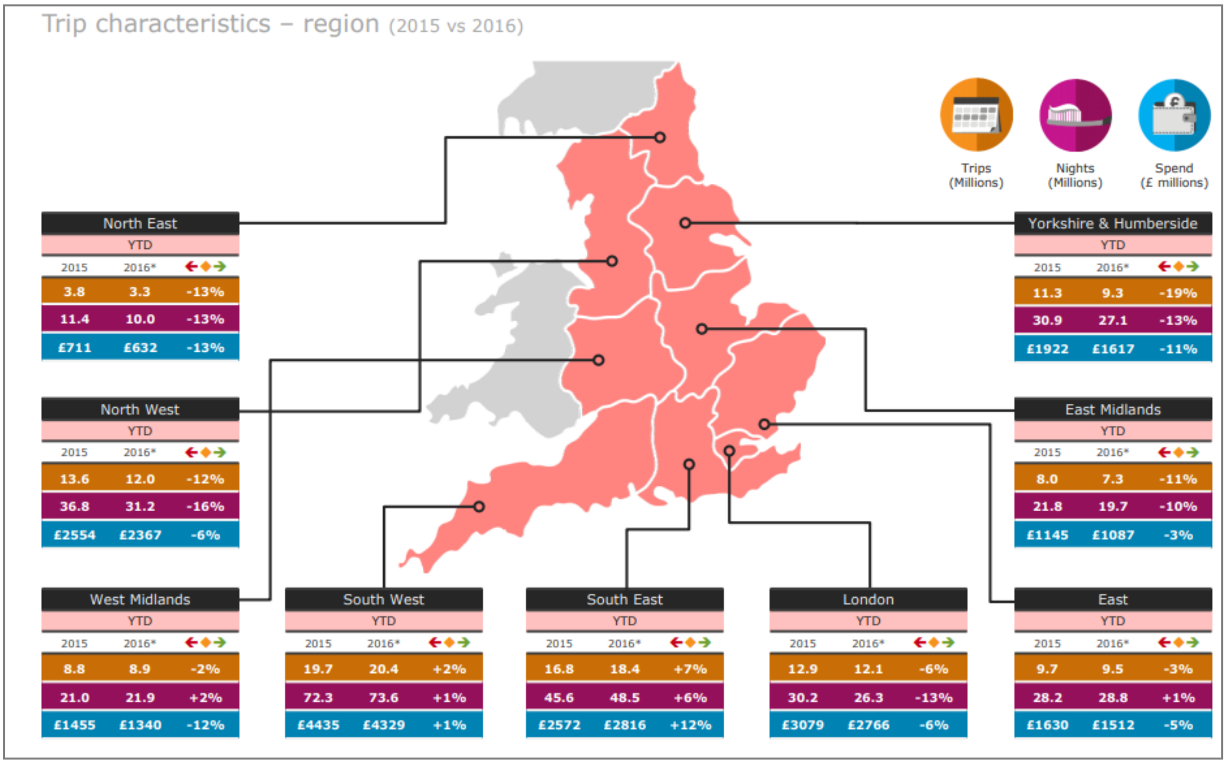
Chart 6: Domestic overnight trips in the United Kingdom – 2011 to 2016 (*Numbers above present the year on year growth) (Source: Visit Britain)



According to the South West England and Domestic Tourism report by VisitEngland, ‘the South West represents the highest proportion of all English regions for domestic overnight trips with around 19% of total trips’.

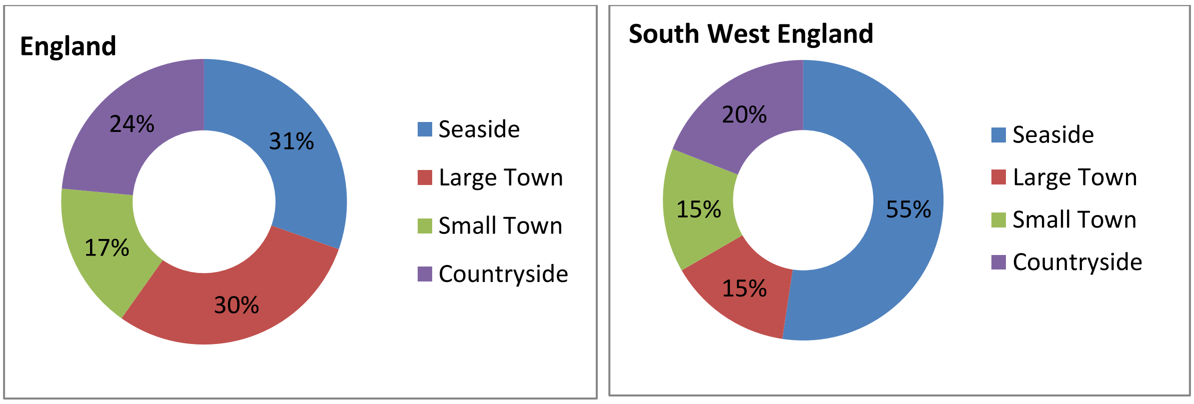
The regional analysis provided in this report suggests that South West England has shown the strongest performance (in absolute numbers) by both nights and domestic trips to the region. The region is also leading by the total tourist spend value.

Chart 7: Regional analysis England – domestic tourist market (Source: VisitEngland)



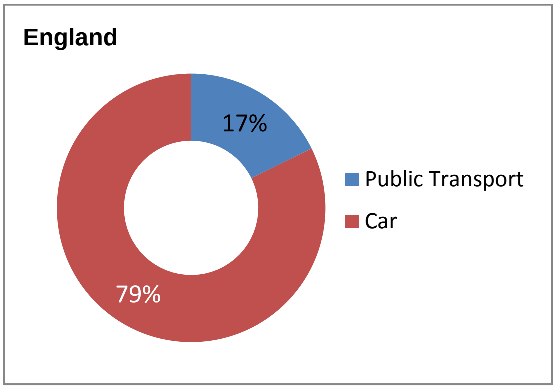
Although domestic tourist trips to the South West are growing, over half of holiday trips (55%) are trips to the seaside. Consequently, we have taken this into consideration (Chart 8).

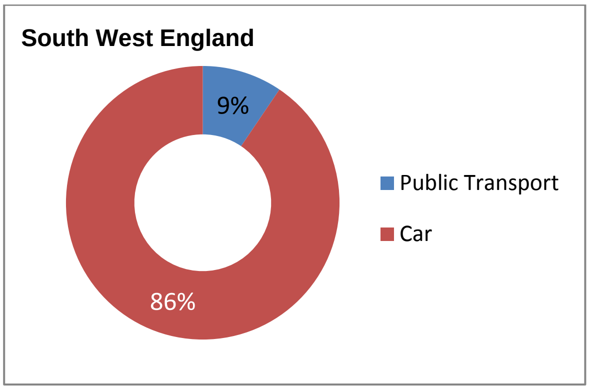
Chart 8: England and South West England domestic tourism by destination type (Source: Visit Britain)



Approximately 90% of domestic trips to the South West region were made by private car. This is an important factor to consider for the Stonehenge Visitor Centre and the wider WHS, as current parking provision is not sufficient (Chart 9).

Chart 9: England and South West England – Domestic tourism arrival means of transport (Source: Visit Britain)





Over half (55%) of domestic overnight trips taken to the South West are holidays, higher than the national average (43%). Of these holidays taken in the South West only half are short breaks with the other half being full week holidays.

Table 5: South West Trips by Purpose (Source: Visit Britain)

Trip purpose	England	% trips taken by all trip takers	South West	% of South West trips taken
All Overnight Trips (m)	100	100%	20	100%
All Holidays	44	43%	11	55%
1-3 nights	30	28%	5	27%
4+ nights	15	14%	5	28%
VFR	41	29%	7	24%
Leisure VFR	25	25%	4	22%
Other VFR	15	15%	2	12%
Business Travel	14	14%	1	8%

These longer holidays are also reflected in a longer average trip length. Though expenditure per night is less than average by around £7, the longer trip length means that around £40 more is spent on a holiday in the South West than on a holiday in England on average.

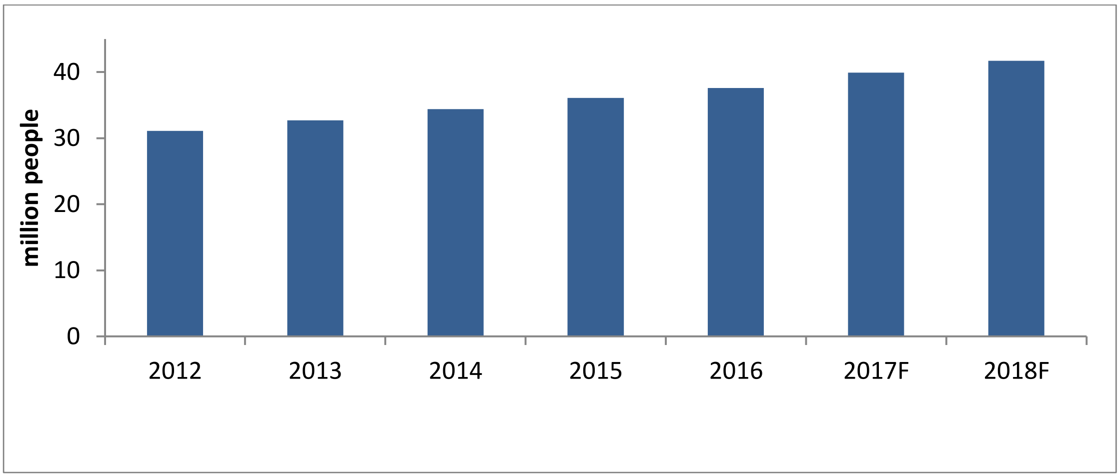
Table 6: England and South West England Tourism – Selected characteristics (Source: Visit Britain)

Domestic holidays	Total England	South West trips
Average spend per trip	£245	£285
Average spend per night	£74	£66
Average trip length (nights)	3.35	4.34

International Tourist Market Analysis

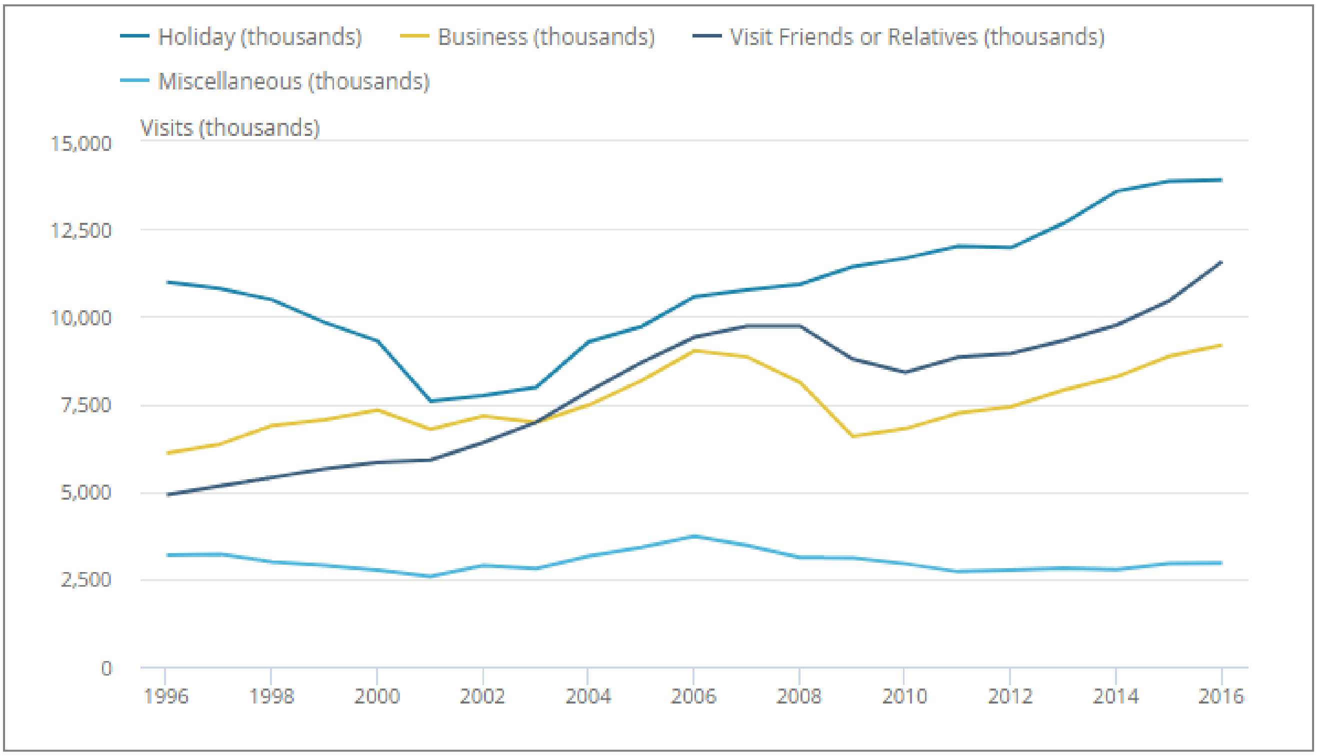
The VisitBritain forecast for the full year 2017 is 39.9 million overseas visits, an increase of 6.2% on 2016, the fastest rate of growth since 2006.The forecast for 2018 is for 41.7 million visits, an increase of 4.4% on 2017 (Chart 10).

Chart 10: Overseas Visits to the UK – projections (Source: Visit Britain)



As shown in Chart 11, the majority of overseas visits to the UK are holiday visitors.

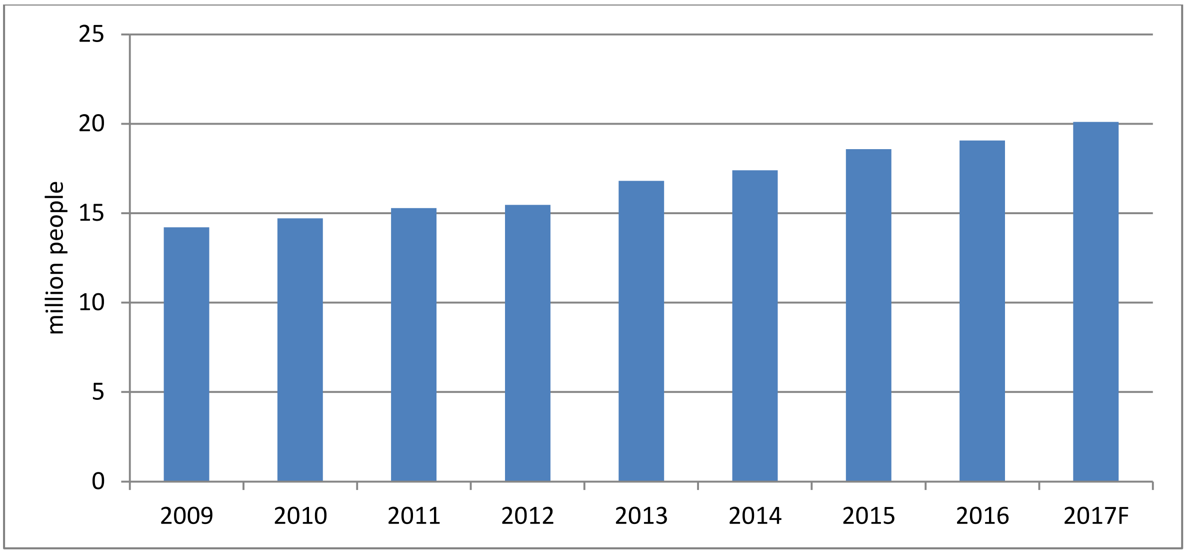
Chart 11: Overseas visits to the UK by purpose, 1996 – 2016 (Source: Office for National Statistics)



London is the prime draw and destination for many overseas visits. There is no information available on the number of visitors to Stonehenge that arrive from London, however, anecdotal evidence suggests that a sizeable proportion of Stonehenge's attendance consists of tour groups or day trips from London. It is estimated that around 60% of total attendance is via organised travel trade. As such, the tourism trend for London may influence Stonehenge's performance. In this section we therefore look at the London international tourist market.

In line with the general UK trend, tourism in London has been growing at an average rate of around 5% per year with approximately 80% of tourists travelling for 'culture and heritage' purposes (Chart 12). It is estimated that 58% out of total visitors are repeat visitors (Mayor of London Report 2017). The average length of stay in London is 5.83 nights, which could allow for a day trip to Stonehenge.

Chart 12: London overnight tourists, 2010- 2016 (Source: Visit Britain)



Stonehenge tourist market projections

The tourist market is defined as visitors staying overnight away from their primary residence in accommodation within one-hour's drive time from a site. This group is typically divided into domestic and international tourists.

Visit Britain collects statistics on tourist visits by county. To approximate the one-hour drivetime isochrone the percentage catchment for each county has been used and this this ratio has been applied to the relevant historic tourism volume.

As shown in Table 7, the total Stonehenge available tourist market has increased slightly since 2010. This has been caused by a very modest growth in the domestic tourist market to the area, and a higher growth rate in the international tourist market over that same period of time.

Table 7: Stonehenge available historic tourist market (Note: numbers are rounded) (Source: AECOM, ArcGIS and Visit Britain)

Catchment Area	2010	2012	2014	2015	2016	Compound Annual Growth Rate 2010-2016
International	1,433,300	1,442,700	1,478,300	1,666,600	1,646,900	2.08%
Domestic	6,763,100	6,608,800	6,680,700	6,786,500	6,828,800	0.06%
Total	8,196,400	8,051,500	8,159,900	8,453,100	8,475,700	0.14%

In order to factor in the political uncertainty and potential Brexit implications, in our prognosis we have allowed for a more conservative international market growth in the longer term. As for the local domestic tourist market, it has been fairly consistent and we have applied the same growth rate of 0.06% for the longer term perspective. Table 8 displays the revised future available tourist market size.

Table 8: Stonehenge available tourist market projections (Note: numbers are rounded) (Source: AECOM, ArcGIS and Visit Britain)

Catchment Area	2017	2019	2020	2025	2030	Compound Annual Growth Rate 2017-2030
International	1,681,100	1,751,600	1,788,000	1,981,500	2,195,900	1.85%
Domestic	9,223,300	9,225,200	9,226,100	9,230,700	9,235,300	0.06%
Total	10,904,400	10,976,800	11,014,100	11,212,200	11,431,200	0.14%

Market penetration rates

Market penetration rates represent the proportion of a market segment that visits a given attraction annually. For the purpose of this analysis, four distinct markets are considered: residents within a one-hour drive time (primary resident market), residents within one-to-two-hour drive time (secondary resident market), UK-wide domestic tourists and international tourists to the one-hour catchment area.

Although official data regarding the visitor mix to Stonehenge is not recorded, English Heritage provided the following estimates: around a quarter of visitors are from the Primary Resident Market (0-60 mins) and a quarter from the Secondary Resident Market (60-120 mins). Around a quarter of tourists are domestic, and a quarter, international.

Table 9:Stonehenge Visitor Centre historic penetration rates

Market Segment	Market Penetration Rate							
	2010	2011	2012	2013	2014	2015	2016	2017
Resident Market								
Primary (0-60 mins)	5.1%	5.5%	5.2%	6.1%	6.6%	6.6%	6.6%	7.6%
Secondary (60-120 mins)	0.9%	1.0%	0.9%	1.1%	1.2%	1.2%	1.2%	1.4%
Total Resident Market	1.6%	1.7%	1.6%	1.9%	2.0%	2.0%	2.0%	2.3%
Tourist Market								
Domestic	8.8%	9.6%	9.1%	10.8%	11.7%	11.9%	12.1%	13.8%
International	1.9%	2.0%	1.5%	1.8%	2.0%	2.0%	2.0%	2.3%
Total Tourist Market	3.1%	3.4%	2.9%	3.4%	3.7%	3.8%	3.8%	4.3%

Primary market penetration rates are generally higher than those achieved in the secondary resident market as the propensity to visit decreases the further away from the attraction a person lives. It is typically more challenging to entice residents who live further away to visit an attraction, meaning the majority of visitor attractions achieve considerably lower penetration rates within the secondary resident market. Penetration rates within the domestic tourist market tend to be heavily driven by the local market context, and vary significantly.

The international tourist market is generally the most difficult to penetrate for attractions, even for those located in strong tourist areas. Attractions located outside established tourist destinations typically have very low penetration rates among international tourists. However, Stonehenge stands out from the typical attraction approach, with a very strong international draw, as it has a clear international profile and “brand”.

If you need help accessing this or any other Highways England information, please call **0300 123 5000** and we will help you.

This document is also available on our website at **www.gov.uk/highways**

If you have any enquiries about this document email **info@a303stonehenge.co.uk**
or call **0300 123 5000***.

*Calls to 03 numbers cost no more than a national rate call to an 01 or 02 number and must count towards any inclusive minutes in the same way as 01 and 02 calls.
These rules apply to calls from any type of line including mobile, BT, other fixed line or payphone. Calls may be recorded or monitored.

Registered office Bridge House, 1 Walnut Tree Close, Guildford GU1 4LZ
Highways England Company Limited registered in England and Wales number 09346363