

**1. National and Regional Government**

- Tourism South East created out of amalgamation of existing regional boards.
- New Forest National Park created on 1 March 2005. Proposed South Downs National Park is undergoing a planning inquiry.
- Strategic planning functions transferred from the County Council to SEERA as part of regional government agenda. The rejected proposal for a new ABP container terminal at Dibden Bay (Southampton Water) in the New Forest highlighted the value of environmental preservation.

**2. Tourism Services in Hampshire**

- Local Authority tourism services have been under considerable pressure and downsizing through reductions in personnel and budgets have affected most LAs in Hants. Eastleigh Borough Council and Havant Borough Council do not now have dedicated tourism officer posts. A TIC has closed in Eastleigh and one will close in Basingstoke in Sept 2006. Pressures are building on other non-key Hants TICs.
- A sub-regional tourism committee has been established in Hampshire chaired by Nicola Horsey and comprising public and private sector representation. A full-time Hampshire Partnership Manager is employed by the committee.
- Key HCC Tourism initiatives since 2000 include
  - Defence of the Realm military heritage marketing consortium
  - Discover Hampshire annual attractions guide
  - SeaBritain2005 and D-Day 60/VE/VJ60th anniversary support
  - Pilgrims Trail, St Swithuns Way LDW route development and HCC promoted route marketing
  - Hampshire Hotel Development Project
  - Visit Hampshire Destination Management System development
  - Hampshire Tourism Trends and Economic Impact Research
  - Support for key local marketing partnerships eg North Hampshire Tourism and Discover Hampshire

### 3. Regeneration Projects

- A number of major regeneration projects have been completed. These have primarily focussed on re-developing released MOD land. They include
  - HMS Vernon, Portsmouth (40 acres)- Gunwharf Quays (opened 2001) retail and leisure complex, Spinnaker Tower (opened 2005) and housing
  - Royal Clarence Yard etc, Gosport (67 acres) – retail, leisure and housing
  - Priddy's Hard, Gosport (100 acres) – Explosion! Museum and housing
  - Farnborough Aerodrome (125 acres) – 1.67m sq ft of office, housing, leisure and hotel
- The Portsmouth Harbour Renaissance project was estimated at £100m value including £40m of Millennium Commission funding
- Plus
  - West Quay, Southampton (opened 2000) - £300m retail development, including 100 stores
  - Festival Place, Basingstoke – (opened 2002), £300m retail and leisure development, 165 shops & 28 restaurants, 1.1m sq ft
  - Whiteley Village/Solent Business Park, Fareham – 130 acres of office, housing, designer outlet centre(opened 1999) with over 50 stores. Further housing and some offices planned on site
  - Hayling Island Sailing Club £4m of investment in new facilities, now an RYA Centre of Excellence (opened 2003) – hosts more world and national dinghy sailing regattas
- £1.2m of SEEDA Small Rural Towns funding will be delivered in Hampshire from 2004-2011. 32 towns across the county are eligible to apply for SEEDA funding.. In 2005/6 action plans had been launched in Alton, Whitehill/Bordon, New Milton and Whitchurch. Housing growth has continued apace across most of the county, especially in the southern corridor.

#### 4. Hotel development

- Hotel development has accelerated since 2000. A buoyant local business and leisure visitor economy combined with improved knowledge of hotel development opportunities has resulted in greater levels of investment in new stock and extensions to existing properties.
- New Hotels since 2002:
  - 133 room Four Seasons Hotel Hampshire, Dogmersfield, Hook, 5 Star, 2005
  - 270 room Jurys Inn, Southampton, 3 star, 2005
  - 131 room Express by Holiday Inn Southampton, Southampton, Upper-tier Budget, 2003
  - 121 room Premier Travel Inn Southampton Airport (opened as a Premier Lodge), Southampton Airport, Budget, 2003
  - 130 room Express by Holiday Inn Portsmouth, Gunwharf Quays, Portsmouth, Upper-tier Budget, 2003
  - 108 room Tulip Inn, Portsmouth, Upper-tier Budget, 2004
  - 22 room Innkeeper's Lodge Portsmouth North, Rowland's Castle, Budget, 2003
- Hotel extensions have added a further 147 rooms over this period and included a number of major upgrades.
- Proposed hotel development:
  - Southampton, Millennium & Copthorne Hotels have signed a deal with Marina Developments to operate a luxury 200-bedroom hotel at Ocean Village. Completion due in 2007
  - Winchester, 120-bedroom Days Inn
  - Farnborough, 77-bedroom hotel proposed as part of town centre revitalisation
  - Farnborough, 154-bedroom hotel proposed at Farnborough Airport. Terms agreed
  - Aldershot, 120-bedroom hotel proposed as part of the Westgate development in the town centre
  - Petersfield, 50-bedroom Premier Travel Inn at the Buckmore Farm site on the A3. Completion imminent
  - Eastleigh, Hotel proposed as part of the leisure development at the Swan Centre

## 5. Visitor attractions

- Considerable investment in new and existing attractions has been a key component of the Renaissance of Portsmouth Harbour Project. This has included:
  - £35.6m Spinnaker Tower, Portsmouth (opened 2005)
  - Action Stations, Portsmouth Historic Dockyard (opened 2001) along with £1m Inter-Action Gallery in 2005
  - Explosion!, Priddy's Hard, Gosport (opened 2001)
  
- Other new attractions include
  - £10.7m Basingstoke Aquadrome (opened 2002)
  - £10m (majority Millennium Commission funds) Milestones Museum, Basingstoke (opened 2000)
  - £5.5m (HLF funded) Intech Science Centre, Winchester (opened 2001)
  - £2m Gosport Discovery Centre (opened 2005)
  - £400k (HLF funded) Adjutant General's Corps Museum, Winchester (opened 2003)
  - £120k Museum of Army Chaplaincy, Amporn, nr Andover (opened 2001)
  
- New investment (often HLF sourced) in existing visitor attractions has included
  - Royal Navy Submarine Museum, Gosport, HLF funded new galleries
  - Marwell Zoo, Winchester, new enclosures
  - King's Royal Hussars Museum, Winchester, HLF funded major refurbishment
  - Aldershot Military Museum, HLF funded major refurbishment
  - Army Medical Services Museum, Aldershot, HLF funded major refurbishment
  - Exbury Gardens, New Forest, new steam railway
  - Hinton Ampner, Winchester, walled garden opening
  - Staunton Country Park, Havant, HLF funded major works
  - Titchfield Haven, Fareham, new galleries
  - Houghton Lodge Gardens, additional 14 acres of garden

## 6. New events and festivals

- CLA Game Fair, Broadlands (every 4 years)
- Festival of Christmas, Portsmouth Historic Dockyard
- Emsworth Food Festival
- Hampshire Food Festival (2 week multi-venue)
- Water Festival (Winchester/Romsey)
- International motocross at Mattersley Bowl, Winchester
- One offs – SeaBritain2005 and Fleet Review; D-Day 60 and VE/VJ 60<sup>th</sup>
- Visitor attractions are focussing more on regular events eg Royal Armouries Fort Nelson, Marwell Zoo, Exbury Gardens

## 7. Market Development

- Both Southampton and Bournemouth Airports have seen substantial growth in passenger numbers and flights. Southampton's increase is primarily the result of it being FlyBe's main hub, whilst Bournemouth has benefited from Ryanair and Easyjet traffic. Actual and forecasted growth for Southampton is

	<i>Annual Passenger Numbers</i>	<i>Air Transport Movements</i>
1997	0.63m	25,100
2004	1.5m	37,400
2015	3m	62,000
2030	6m	96,300

- The cruise market has grown substantially in Southampton and to a lesser degree Portsmouth. Southampton is home port to Carnival and regular turnaround port for Royal Caribbean International, Fred Olsen Cruise Line, Saga Cruises and Thomson Cruises. ABP has

invested £10m in its cruise terminals in Southampton. The cruise market is worth £202m to the Hampshire & IoW economies and sustains 2,400 jobs.

*Southampton Port Passenger Nos*

2000	326,000
2001	353,950
2002	386,000
2003	469,564
2004	550,000
2005	702,356

- P&O terminated its cross-channel ferry services from Portsmouth to France in 2005 with a loss of 1,200 jobs. The company has retained its route to Spain. Brittany Ferries and LD Lines still run services to France.
- The market for sailing and other watersports in the Solent has developed. This has led to increasing demand for marina berths, access to the water and markets for support businesses. The RYA sees a doubling of leisure boating over the next 15-20 years.
- More high profile motorsport events at Thruxton racing circuit near Andover and the continued growth of Goodwood Festival of Speed and Revival meetings has led to increasing demand for accommodation.
- Blue flag award for West Beachlands Central beach (since 2000), Hayling Island. West Beachlands West awarded since 1991. Only 2 beaches in Hants.

## **8. Infrastructure**

- Limited transport infrastructure improvements have taken place. However, the M4/A34 Chieveley Junction improvement (Berkshire) has marginally improved access from the North. Motorway Services have been added at Winchester. Park & Ride facilities have been expanded in Winchester.
- A new rail service between Eastleigh and Chandlers Ford opened in 2003, however this is primarily a commuter route. Railway station environmental improvements have been undertaken across the county. A bid for £170m of government funding to implement a Light Rapid Transit system linking Fareham, Gosport and Portsmouth was refused.
- New Long Distance Walking routes have been added Pilgrims Trail (2000) and St Swithun's Way (2002).

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