Accommodation Facilities in Salisbury

Infrastructure Evaluation

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Prepared on behalf of Salisbury District Council by:

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1: Executive Summary

1.1: Key conclusions

1) There may be perceived gaps and deficiencies in the visitor accommodation sector.

2) There is a demand for better provision of business and conference facilities.

3) It is important that any development is sensitive to the character of Salisbury.

4) Residents, tourists and business visitors alike all raised issues related to Salisbury's transport infrastructure.

1.2: Tourist Accommodation

- Visitors stayed in Salisbury for an average of 4 nights, spending around £19 per person per night on their accommodation. The majority of visitors (55%) were on a short break.
- Visitors stayed in self-catering accommodation (34%), B&Bs (29%), hotels (23%) or the home of a friend or relative (16%).
- Visitors rated the cleanliness, quality of service, value for money and availability of their accommodation highly.
- Visitors tended to agree that there is enough B&B and mid-range accommodation in Salisbury. However, they were less sure whether there was enough high quality or budget accommodation.
- There are around 3,800 bedspaces available in Salisbury. This is comprised of 69% serviced accommodation and 31% non-serviced accommodation. Salisbury's accommodation capacity is set to be augmented by a new hotel at Solstice Park, providing some 88 rooms.
- Whilst there is sufficient mid range accommodation in Salisbury, there is evidence to suggest a lack of supply in the budget and high quality markets relative to demand.

1.3: Business Visitors

- Salisbury receives in the order of 73,000 business visitors per annum, representing 19% of the total visitor market. This compares with Bournemouth, where business visitors account for 12% of the total visitor market, and Weymouth (10%).

- Whilst business visitors to Salisbury account for a higher *proportion of the overall visitor market* than comparable destinations, the City is less successful at attracting business visitors *relative to its size* than comparable destinations.

- Whilst Salisbury can adequately accommodate smaller business / conference events, it is unsuitable for many larger events.

- Business visitors require more high quality accommodation and a greater range and quality of restaurants and other catering facilities than is currently available in Salisbury.

2: Introduction

2:1: Background

Salisbury District Council has recently embarked on the new "Local Development Framework" planning process. This gives the Council the opportunity to set out a clear, distinctive and realistic vision of how the area will change over the next twenty years. It will promote a realistic approach to managing development and delivering change.

The Council's Economic Development service is responsible for the "Economy" section of the Local Development Framework. This includes tourism. The Council is beginning to gather evidence and undertake research into areas of the tourism economy which need to be considered as part of this new planning process.

The demand and supply of visitor accommodation, leisure facilities, and tourism related infrastructure have been identified as key topics for consideration. The Council commissioned the Market Research Group, Bournemouth University, to undertake this element of the research.

2.2: Aims of the Research

The primary aim of the research was to investigate visitor accommodation and related infrastructure, with particular reference to present and future supply and demand.

More specifically, the research was designed to achieve the following objectives:

- Investigate demand and supply of accommodation and related infrastructure.
- Include issues of quality and location.
- Resident, visitor, local business and stakeholder perspectives.
- Investigate the business visitor market.

2.3: The Market Research Group

The Market Research Group, based within Bournemouth University, was commissioned by Salisbury District Council to undertake this research.

The Market Research Group provides market research and intelligence services to organisations in the service sector and local government.

The Market Research Group offers a wealth of experience and expertise in the field of leisure, tourism, heritage, best value and economic impact research at a national, regional and local level.

Using external market research professionals to complete all or part of the consultation and research process can bring together greater legitimacy and independence to the results, expertise and research experience, less disruption to other in house services, and greater resources.

These benefits are further enhanced by the relationship developed between public sector organisations across the Southern region and the Market Research Group.

2.4: Methodology

The nature of the research endorsed the use of face-to-face interviews for residents of and visitors to Salisbury.

Interviews were conducted in Salisbury between the hours of 9am and 5pm on weekdays and weekends during April 2005. Potential respondents were selected using a simple random sampling procedure, whereby each person passing a designated point had an equal chance of being selected for interview. No person under the age of 16 was interviewed.

Depth interviews were conducted using a semi-structured format, whereby specific issues are raised in a one-to-one discussion with respondents, but digression is encouraged to elicit rich and deep data.

Contextual issues were investigated by drawing on publicly available existing reports, publications and secondary data sources, in addition to previous research conducted by the MRG.

Where the term "Salisbury" is used throughout this report, it refers to the District of Salisbury.

2.5: The Survey Questionnaire

The questionnaires were designed to meet the specific aims of the research. The questionnaire format included a mixture of multiple-choice and single-response questions to obtain quantitative data, and open-ended questions to obtain qualitative data. A copy of the survey questionnaire is appended to this report.

2.6: Sample Size and Statistical Validity

A total of 288 interviews were conducted. This included 199 interviews with local residents, and 89 interviews with visitors staying in Salisbury.

A sample size of 288 implies a level of statistical validity of ±5.8% at the 95% confidence level (i.e. there is only 5%, or 1 in 20, chance of the margin of error being greater than this).

Data for Salisbury residents has been weighted on age to ensure that the results presented in this report accurately reflect the demographic profile of the city's residents.

In addition to the 288 quantitative interviews, a total of 15 depth interviews were conducted in order to obtain qualitative data. The interviews were conducted with individuals working in the following sectors:

- Accommodation
- Leisure facility / visitor attractions
- Public sector tourism organisations
- Businesses with a high demand for conference / business guest facilities

3: Context and Market Trends

The following is a summary of key trends in the UK business travel market:

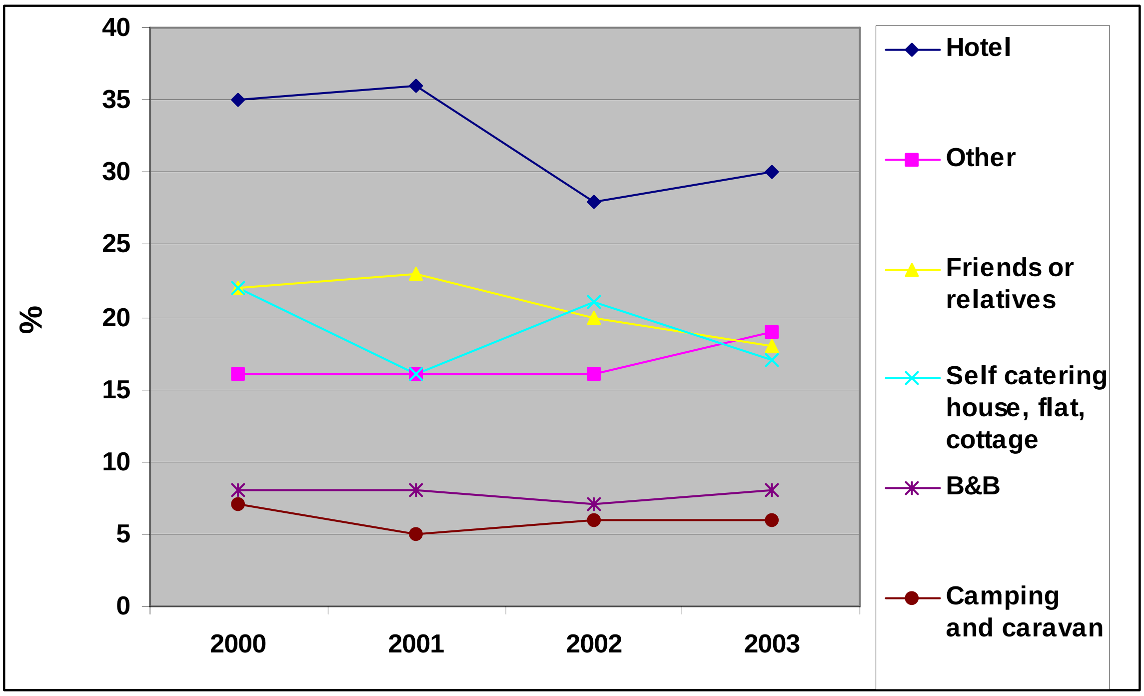
- Hotel stays, both for leisure and business, are dominated by those from ABC1 socioeconomic groups.
- There appears to be a polarisation of consumer demand within the hotel market. The budget sector is showing most signs of growth in terms of the number of hotels opening, and there is increased investment in the upscale sector.
- Increased demand at the top end of the market is highlighted by the popularity of boutique and niche hotels.
- 18% of consumers book their hotel accommodation online, and 25% book directly via the telephone.
- 23% of business visitors prefer to stay in a well-known hotel whilst travelling alone, compared with 17% of leisure visitors.
- Business travellers have a higher demand for hotels "with a difference" such as design-led or boutique hotels.
- The most important facility for leisure visitors is tea and coffee making facilities in their room. For business visitors, a television in their room is the most important facility. A range of restaurants and bar are also demanded by the majority of leisure and business visitors alike.
- Leisure visitors are more willing than business visitors to pay a premium for a swimming pool, whilst business visitors are more willing to pay a premium for a fitness centre.

Source: Mintel, 2003

The following table illustrates recent trends in the type of accommodation used during trips to the South West. There has been a general diversification in accommodation used, with a decline in hotel use and staying with friends or relatives. 16% of visitors stay in other types of accomodation, which may include second homes, canal boats etc.

Table 1: Accommodation Used in the South West 2000 - 2003				
	2000 (%)	**2001 (%)**	**2002 (%)**	**2003 (%)**
Hotel	35	36	28	30
Friends or relatives	22	23	20	18
Self catering house, flat, cottage	22	16	21	17
B&B	8	8	7	8
Camping and caravan	7	5	6	6
Other	16	16	16	19

Fig a) Accommodation used in the South West 2002-2003

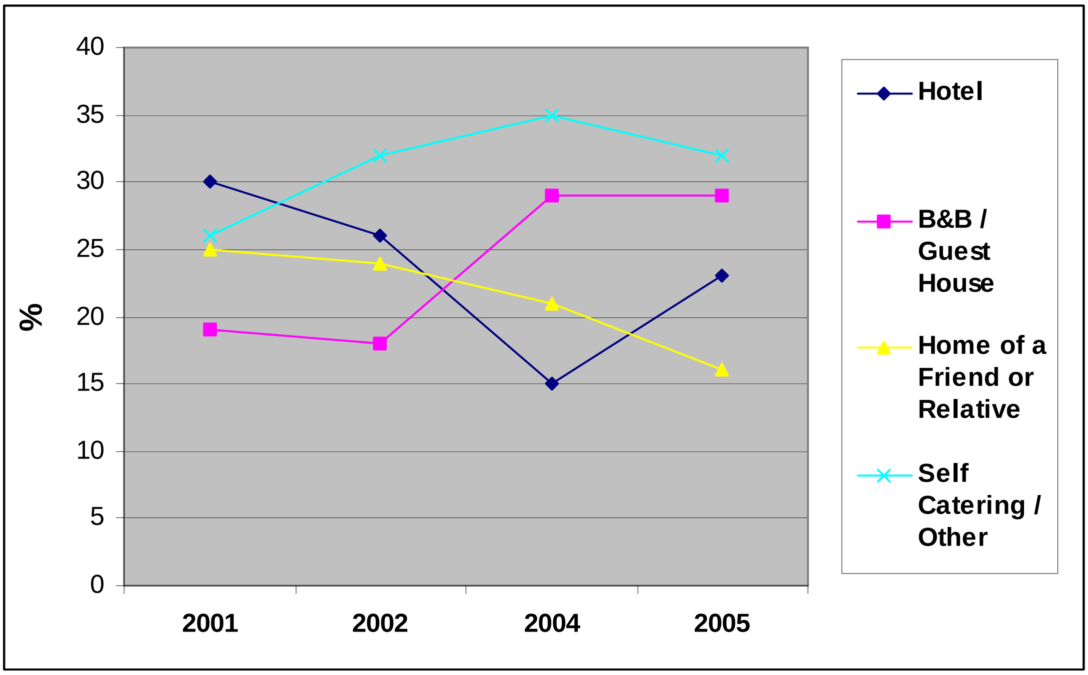


There have been marked fluctuations in the type of accommodation used by visitors to Salisbury between 2001 and 2005, with noticable shifts from the use of hotels and the homes of friends or relatives to B&Bs, guest houses and self catering accommodation.

Table 1b: Accommodation Used in Salisbury 2001 - 2005

	2001 (%)	2002 (%)	2004 (%)	2005 (%)
Hotel	30	26	15	23
B&B / Guest House	19	18	29	29
Home of a Friend or Relative	25	24	21	16
Self Catering / Other	26	32	35	32

Fig b: Accommodation Used in Salisbury 2001-2005



4: Resident Survey

4.1: Salisbury Resident Population Profile

The following table illustrates the age profile of residents in Salisbury, allowing results presented by age in this section to be viewed in context.

Table 2: Salisbury Resident Population Profile

Age	Number	Percent (%)
Under 16	21092	18.4
16 - 19	6455	5.6
20 -29	12446	10.9
30 - 59	47947	41.8
60 - 74	16692	14.6
75+	9981	8.7
Total	**114613**	**100.0**

Source: Office for National Statistics, 2003

4.2: Residents' Impressions of Tourism Accommodation

The following table illustrates the impression that Salisbury residents have of the city's visitor accommodation. This provides an insight into the possible reaction of residents to any future development in the sector.

Residents tended to agree that there was enough B&B accommodation in Salisbury (56% in agreement). However, they were less sure whether there was enough hotel accommodation in Salisbury, whether budget, mid-range or quality.

Table 3: From your general impressions of Salisbury, or from first hand experience, please tell us whether you agree or disagree with the following statements. (Q9)

Base: All residents / day visitors	**(5) Strongly agree (%)**	**(4) Agree (%)**	**(3) Neither Agree nor disagree (%)**	**(2) Disagree (%)**	**(1) Strongly disagree (%)**	**Average rating (5=strongly agree, 1=strongly disagree)**	***Sample size***
There is enough B&B / Guest house accommodation in Salisbury	7.7	49.2	33.7	7.9	1.5	**3.5**	*197*
There is enough mid range hotel accommodation in Salisbury	2.9	44.0	39.5	11.3	2.4	**3.3**	*199*
There is enough budget hotel accommodation in Salisbury	0.8	38.2	40.4	17.8	2.9	**3.2**	*196*
There is enough high quality hotel accommodation in Salisbury	2.8	33.1	36.1	24.7	3.2	**3.1**	*197*

5: Visitor Survey

5.1: Visit Characteristics

Visitors tended to stay in serviced accommodation - B&Bs / guest houses (29%) or hotels (23%). A significant proportion of visitors (34%) stayed in self-catering accommodation, and 16% stayed with friends or relatives.

Table 4: What type of accommodation are you staying in? (Q4)		
Base: All staying visitors	**Frequency**	**Percent (%)**
B&B / guest house	20	**28.6**
Hotel	16	**22.9**
Home of friend or relative	11	**15.7**
Self catering / other	23	**33.8**
Total	**70**	**100.0**

The most common length of stay was 2-3 nights (48%), followed by 1 night (33%). A further 6% of visitors were staying 4-7 nights, and 3% were staying for more than 7 nights. The average length of stay was 4 nights.

Table 5: How many nights are you staying in Salisbury? (Q6)		
Base: All staying visitors	**Frequency**	**Percent (%)**
1 night	26	**32.5**
2-3 nights	38	**47.6**
4-7 nights	10	**6.3**
More than 7 nights	2	**2.6**
Total	**80**	**100.0**
Average length of stay: 4.0 nights		

The majority of visitors (55%) were on a short break or additional holiday. 24% of visitors were on a main holiday, 12% were on business, and 8% were visiting friends or relatives.

Table 6: Are you in Salisbury for (Q8)		
Base: All staying visitors	**Frequency**	**Percent (%)**
Main holiday	20	**24.1**
Short break / additional holiday	46	**55.4**
Visiting friends or relatives	7	**8.4**
Business	10	**12.0**
Total	**83**	**100.0**

5.2: Visitor Accommodation Expenditure

The following table shows the expenditure on accommodation expected of an visitor staying in Salisbury. 35% of visitors spend less than £20 per person per night on accommodation. 28% of visitors spend between £20 and £40, 22% spend between £40 and £60, and 15% spend more than £60. The average visitor to Salisbury spends around £19 per night on accommodation.

Table 7: Approximately how much does your accommodation cost, per person per night? (Q5)		
Base: All staying visitors	**Frequency**	**Percent (%)**
Up to £20	16	34.8
Between £20 and £40	13	28.3
Between £40 and £60	10	21.7
More than £60	7	15.2
Total	**46**	**100.0**
Average cost per person per night: £18.62		

The following table shows the expenditure on accommodation expected of visitors staying in paid accommodation in Salisbury (i.e. excluding those who are staying with friends or relatives). 25% of visitors spend less than £20 per person per night, 35% spend between £20 and £40, 28% spend between £40 and £60 per night, and 13% spend more than £60 per person per night on their accommodation. The average expenditure per person per night of visitors staying in paid accommodation in Salisbury is £20.25.

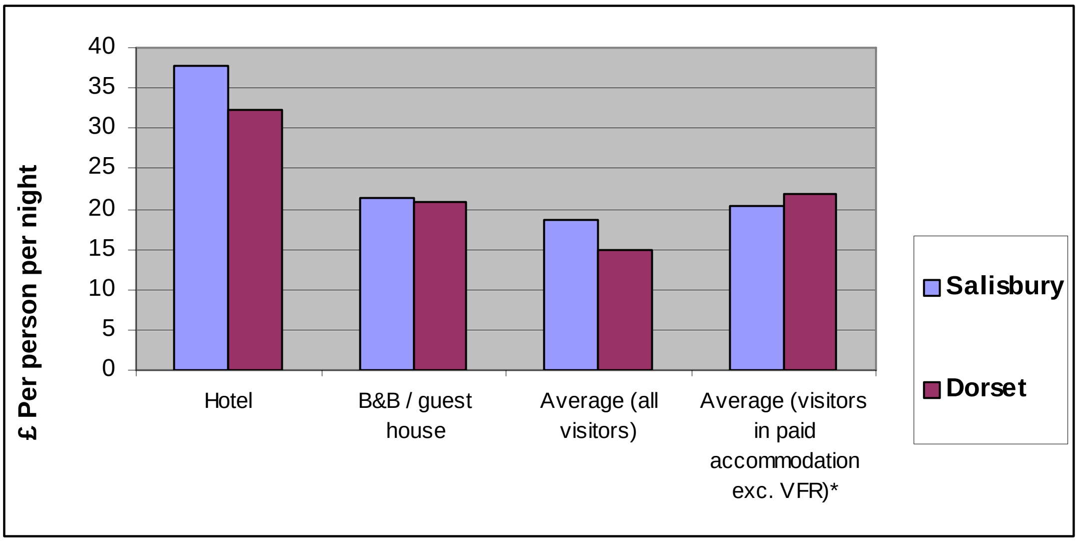
Table 8: Approximately how much does your accommodation cost, per person per night? (Q5)		
Base: Visitor staying in paid accommodation (i.e. excluding those visiting friends or relatives)	**Frequency**	**Percent (%)**
Up to £20	8	25.0
Between £20 and £40	11	34.4
Between £40 and £60	9	28.1
More than £60	4	12.5
Total	32	**100.0**
Average cost per person per night: £20.25		

The following table illustrates the average expenditure of visitors staying in different accommodation types, both in Salisbury and in Dorset. Generally, visitors staying in Salisbury tend to spend more per person per night on their accommodation that visitors to Dorset. However, the average expenditure per person per night once visitors staying with friends and relatives are excluded from the calculation is slightly higher amongst visitors to Dorset than visitors to Salisbury.

Table 9: Average accommodation expenditure by accommodation type (per person per night)

	Salisbury	Dorset
Hotel	£37.81	£32.21
B&B / guest house	£21.30	£20.91
Average (all visitors)	£18.62	£14.81
Average (visitors in paid accommodation exc. VFR)*	£20.25	£21.95

Fig c) Accommodation expenditure by accommodation type



5.3: Levels of Visitor Satisfaction with Accommodation

Visitors expressed an extremely high level of satisfaction with their accommodation in Salisbury. Cleanliness, quality of service, value for money and availability were all rated "very good".

Table 10: How would you rate the following aspects of the accommodation you are staying in? (Q7)

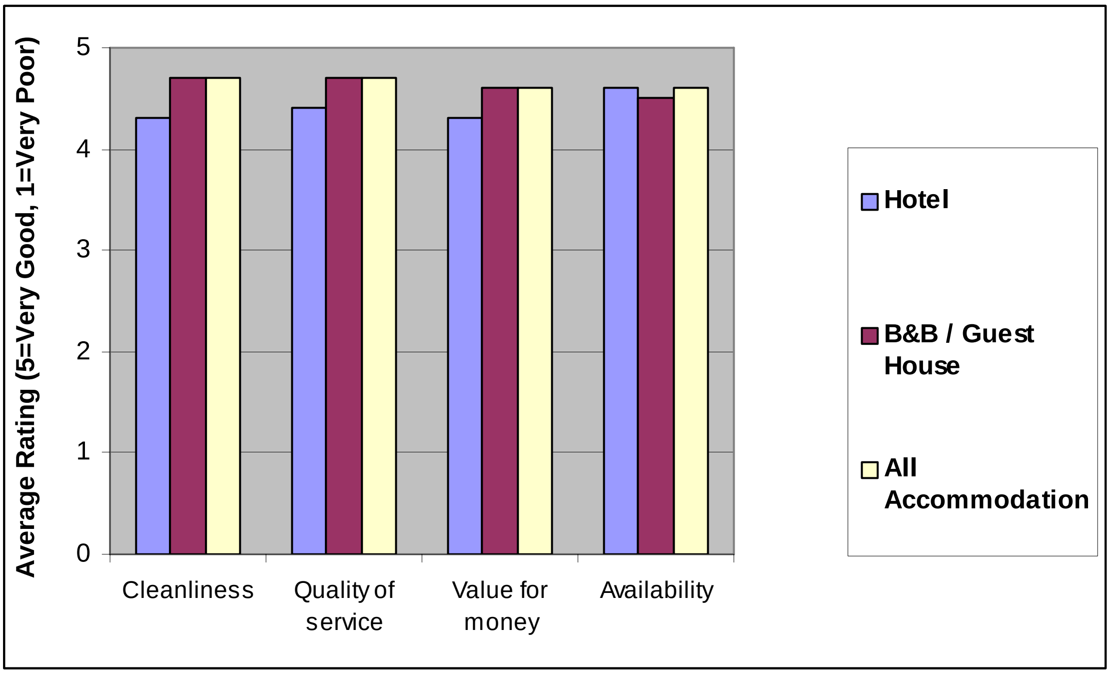
Base: Staying visitors	**(5) Very good (%)**	**(4) Fairly good (%)**	**(3) Average (%)**	**(2) Fairly poor (%)**	**(1) Very poor**	***Average rating (5=very good, 1=very poor)***
Cleanliness	66.7	33.3	0.0	0.0	0.0	*4.7*
Quality of service	74.2	25.8	0.0	0.0	0.0	*4.7*
Value for money	60.9	39.1	0.0	0.0	0.0	*4.6*
Availability (i.e. how easy it was to find and book)	67.6	26.5	5.9	0.0	0.0	*4.6*

The following table illustrates visitor satisfaction with various aspects of accommodation by accommodation type. In general, hotels received lower satisfaction ratings than B&B / guest houses and the average for all accommodation types. It should be noted, however, that sample sizes are low and results should be treated with caution.

Table 11: How would you rate the following aspects of the accommodation you are staying in? (Q7 Average Rating, 5=Very Good, 1=Very Poor)

Base: Staying visitors	**Hotel**	**B&B / Guest House**	**All Accommodation**
Cleanliness	4.3	4.7	4.7
Quality of service	4.4	4.7	4.7
Value for money	4.3	4.6	4.6
Availability (i.e. how easy it was to find and book)	4.6	4.5	4.6
Overall rating	*4.4*	*4.6*	*4.7*

Fig d) Accommodation expenditure by accommodation type



5.4: General Visitor Impressions of Accommodation Provision

Visitors tended to agree that there is enough bed and breakfast and mid-range hotel accommodation in Salisbury. However, they were less sure whether there was enough high quality or budget hotel accommodation.

Table 12: From your general impressions of Salisbury, or first hand experience, please tell us whether you agree or disagree with the following statements (Q9)

Base: Staying visitors	**(5) Strongly agree (%)**	**(4) Agree (%)**	**(3) Neither Agree nor disagree (%)**	**(2) Disagree (%)**	**(1) Strongly disagree (%)**	**Average rating (5=strongly agree, 1=strongly disagree)**
There is enough bed and breakfast / guest house accommodation in Salisbury	13.3	47.8	22.2	14.4	2.2	**3.6**
There is enough mid range hotel accommodation in Salisbury	4.5	50.0	39.8	3.4	2.3	**3.5**
There is enough high quality hotel accommodation in Salisbury	0.0	16.9	52.8	24.7	5.6	**2.8**
There is enough budget hotel accommodation in Salisbury	0.0	20.0	45.6	28.9	5.6	**2.8**

6: The Business Visitor Market

6.1: Context and Market Trends

The following is a summary of key trends in the UK business travel market:

- Growth in the number of business trips taken is currently sluggish.
- Businesses are cutting their travel budgets, and there is a move away from premium travel and accommodation to cheaper alternatives as a result.
- Around one-quarter of business travellers are female. Accommodation providers are becoming more "female friendly", for example by offering healthier meal alternatives.
- The proportion of business visits made during weekdays is increasing, whereas the proportion made during the weekend is decreasing.
- Business visitors are as likely as leisure visitors to be willing to pay for additional facilities such as a gym in their accommodation.
- Consumers in the "AB" socioeconomic group are around 3 times as likely to stay in hotels for business purposes than "C1" consumers.
- Business visitors are more "brand conscious" than leisure visitors when choosing a hotel, with around one-quarter preferring a well-known hotel when travelling alone.
- Business visitors have a higher demand for a hotel with a "difference" - for example, a design-led or boutique hotel - than leisure visitors.

Source: Mintel, 2003

6.2: Scale

The following information compares the business visitor market in Salisbury compared with various destinations. Weymouth and Bournemouth were selected for comparison as these were the most appropriate destinations for which relevant data was available.

Salisbury receives approximately 73,000 business visitors per year, representing approximately 19% of the total visitor market (*source: The Economic Impact of Tourism in Salisbury, South West Tourism*).

This compares with Bournemouth, which receives 164,000 business visitors each year (12% of the total visitor market), and Weymouth, which receives 45,000 business visitors per year (10% of the total).

This highlights the significance of the business visitor market to Salisbury. Nonetheless, relative to it's size, Salisbury is not as successful as Bournemouth and Weymouth at attracting business visitors. For each 100 residents, Salisbury receives 64 business visitors, compared to 101 visiting Bournemouth, and 71 visiting Weymouth.

The following section provides analysis of issues facing the business visitor market.

Fig e) Number of Business Visitors to Salisbury and Comparable Destinations (000s)

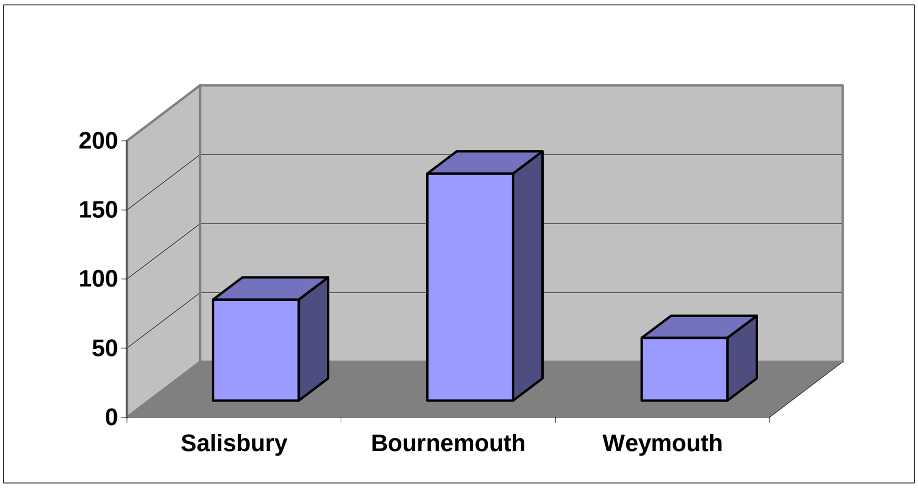


Fig f) Business Visitors as a Proportion of the Total Visitor Market: Salisbury and Comparable Destinations

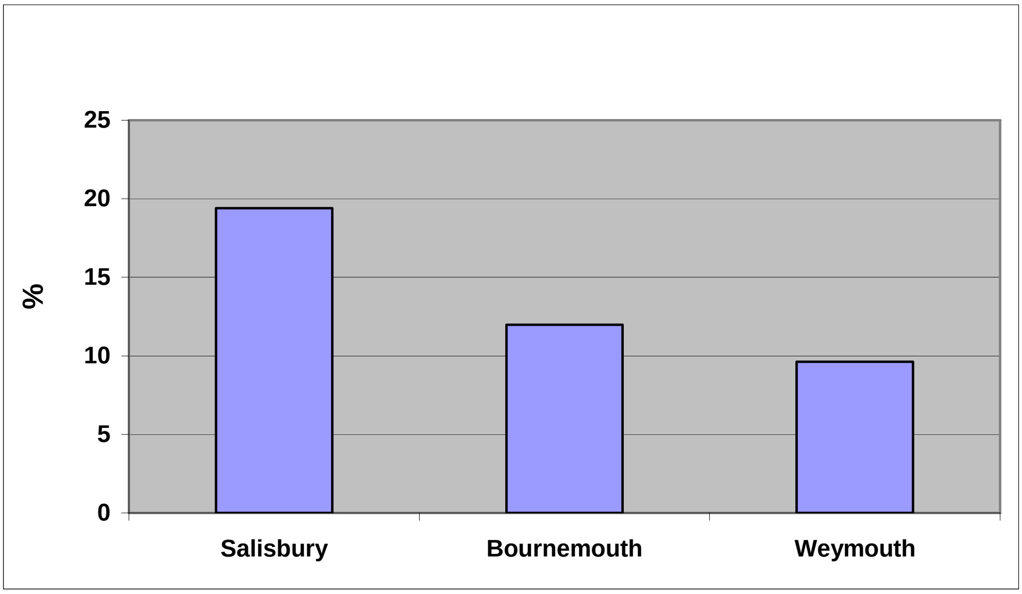


Fig g) Business Visitors per 100 Resident Population : Salisbury and Comparable Destinations

6.3: Business Visitor Market Evaluation

The following is a summary of interviews conducted with professionals employed in providing services to business visitors to Salisbury. The analysis is based on anecdotal evidence from the opinions of individuals based on their everyday experience of the business visitor sector.

Market Trends

The retail and financial businesses interviewed generally noted positive trends in their business. The respondents also seem to feel that Salisbury offers good prospects for their business in the longer term.

The retail and financial business respondents have noted a general trend for short-term visits to Salisbury, rather than long-term stays. In addition, they note the wealth of visitor attractions in the surrounding area, which compliment those of the city itself. With these observations in mind, they do feel that Salisbury provides enough visitor attractions for its tourists.

However, there was some feeling that the city could benefit from additional recreational activities - such as sporting or cinema facilities.

Business and Conference Facilities in Salisbury

The general opinion regarding business and conference facilities in Salisbury is that whilst it can accommodate smaller events, there is very little provision for larger conferences and exhibitions - forcing local businesses to look elsewhere.

Indeed, the businesses who offered comment each had some conference facilities that were internal to their business, and therefore did not need to use those in Salisbury even for smaller events. There was also some concern about the availability of catering facilities for delegates who wished to dine in the town itself.

Business Accommodation

Again, in regard to business accommodation, each of the respondents had some facilities of their own, possibly with the use of formal or semi formal contracts with specific accommodation providers. However, when looking for alternative accommodation, they tend to use hotels that provide respectable, mid to high range hotel accommodation for their delegates and clients. On many occasions, they are also reliant on availability, as often meetings are arranged at short notice.

Overall, it appears whilst the business respondents feel that there is sufficient accommodation for visitors to Salisbury, the overall standard could perhaps be improved - particularly in regard to attracting business visitors.

One respondent would also like to see more available in terms of online provision of accommodation details, to help his business plan ahead.

Improvements to Infrastructure

When asked to make recommendations for the future development of business tourism in Salisbury, respondents noted two specific improvements.

The first was to the accommodation available in the city. At present, it was felt that Salisbury does not have the facilities to cope with large numbers of conference guests - in terms both of hotel size and availability of single rooms for delegates. It was also felt that provision of accommodation lists on the Internet could be improved, in order to help with conference booking.

The second improvement was to the transport infrastructure of the area. Respondents felt that commuting issues can cause additional strain to their staff and delegates, and that therefore it would be helpful if issues such as congestion and local parking could be addressed.

7: Accommodation Supply

7.1: Total Accommodation Stock

Salisbury's serviced accommodation stock consists of 1273 bedrooms containing some 2639 bedspaces. This will be augmented by the addition of a new hotel at Solstice Park. This development is set to contain some 88 bedrooms, with conference facilities for 80.

Non-serviced accommodation (for example, self-catering and camping / caravan sites) is comprised of 66 self catering units and 325 touring pitches.

Table 13: Accommodation Stock in Salisbury	
Serviced Accommodation	
Total Bedrooms	1273
Total Bedspaces	2639
Non-Serviced Accommodation	
Units	66
Bedspaces	198
Touring Pitches	325
Bedspaces	975
All Accommodation	
Total Bedspaces	3812

7.2 Accommodation Stock by Type

The majority of accommodation establishments in Salisbury (63%) are bed and breakfasts, inns or guest houses. 21% of establishments are self catering, and 11% are hotels.

Despite representing only 11% of accommodation establishments, the hotel sector is the single largest provider of bedspaces in Salisbury (33%). Similarly, holiday parks represent 3% of establishments, but 25% of bedspaces. Bed and breakfasts, inns and guest houses together provide 33% of Salisbury's bedspace capacity.

Table 14: Accommodation Stock by Type

	Accommodation Providers (number of establishments)	**Accommodation Providers (%)**	**Bedspaces (number)**	**Bedspaces (%)**	***Average size (number of bedspaces per establishment)***
B&B	123	45.2	728	19.0	*6*
self-catering	56	20.6	198	5.2	*4*
Inn	31	11.4	307	8.0	*10*
Hotel	30	11.0	1282	33.4	*43*
Guest House	18	6.6	237	6.2	*13*
Holiday Park (inc. Touring Pitches)	7	2.6	975	25.4	*139*
Farm (Serviced)	5	1.8	32	0.8	*6*
Youth & Group	2	0.7	78	2.0	*39*
Total	**272**	**100.0**	**3837**	**100.0**	***14***

Fig h) Accommodation by Average Size of Establishment

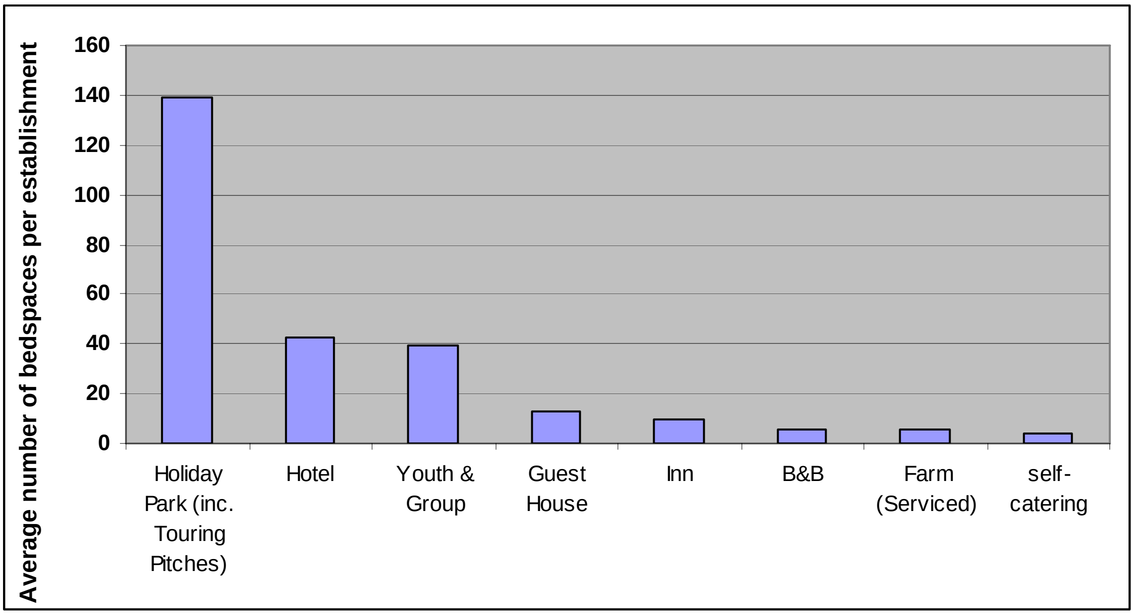


Fig i) Total Accommodation Stock by Number of Establishments

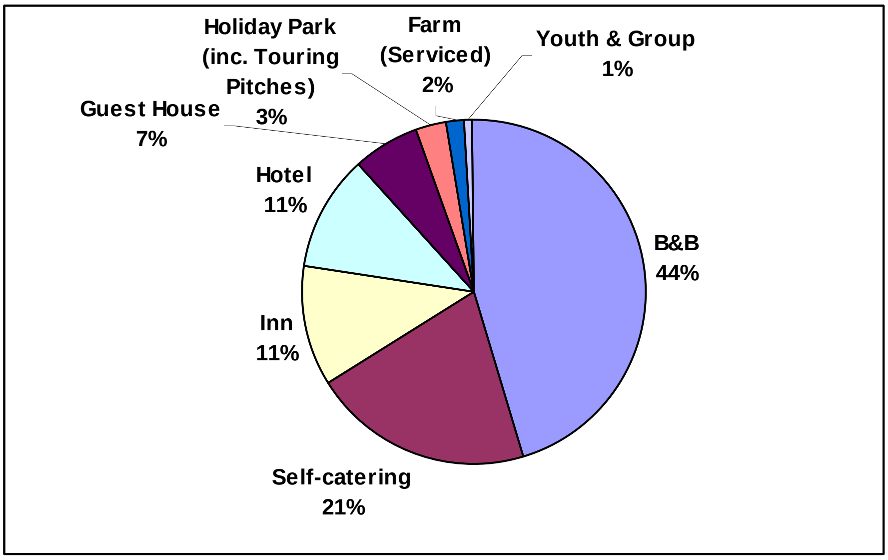
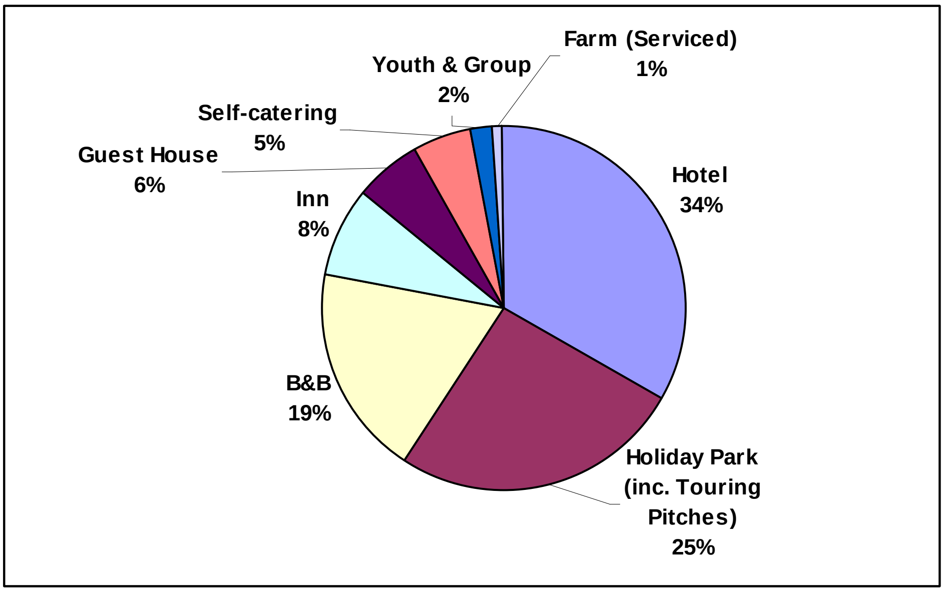


Fig j) Total Accommodation Stock by Number of Bedspaces



7.3 Accommodation Stock by Location

30% of accommodation establishments are located within the central Salisbury postcode area of SP1. A further 19% are located in SP3, 17% in SP5, 12% in SP2 and 11% in SP4.

Table 15: Accommodation Location

Postcode	**Number of establishments**	**Percent (%)**
SP1	81	29.8
SP2	32	11.8
SP3	52	19.1
SP4	29	10.7
SP5	47	17.3
SP7	2	0.7
BA12	27	9.9
Unknown	2	0.7
Total	**272**	**100.0**

Table 16: Location of Accommodation by Establishment Type

Postcode	**B&B (number of establis-hments)**	***B&B (%)***	**Guest house (number of establis-hments)**	***Guest House (%)***	**Hotel (number of establis-hments)**	***Hotel (%)***	**Inn (number of establis-hments)**	***Inn (%)***	**Self catering (number of establis-hments)**	***Self-Catering (%)***
SP1	41	*33.3*	7	*38.9*	6	*20.0*	8	*25.8*	17	*30.4*
SP2	14	*11.4*	2	*11.1*	5	*16.7*	5	*16.1*	4	*7.1*
SP3	18	*14.6*	3	*16.7*	5	*16.7*	8	*25.8*	14	*25.0*
SP4	14	*11.4*	4	*22.2*	5	*16.7*	1	*3.2*	4	*7.1*
SP5	26	*21.1*	1	*5.6*	4	*13.3*	5	*16.1*	6	*10.7*
SP7	0	*0.0*	0	*0.0*	0	*0.0*	0	*0.0*	2	*3.6*
BA12	10	*8.1*	0	*0.0*	5	*16.7*	4	*12.9*	8	*14.3*
Unknown	0	*0.0*	1	*5.6*	0	*0.0*	0	*0.0*	1	*1.8*
Total	**123**	***100.0***	**18**	***100.0***	**30**	***100.0***	**31**	***100.0***	**56**	***100.0***

NB: The above table excludes data for touring parks, farms and youth / group accommodation.

7.4: Accommodation Stock by Size

Accommodation in Salisbury is comprised primarily of smaller establishments, with 71% of establishments providing fewer than 5 bedrooms. 16% of establishments provide 5 – 10 bedrooms, and 13% provide more than 10 bedrooms.

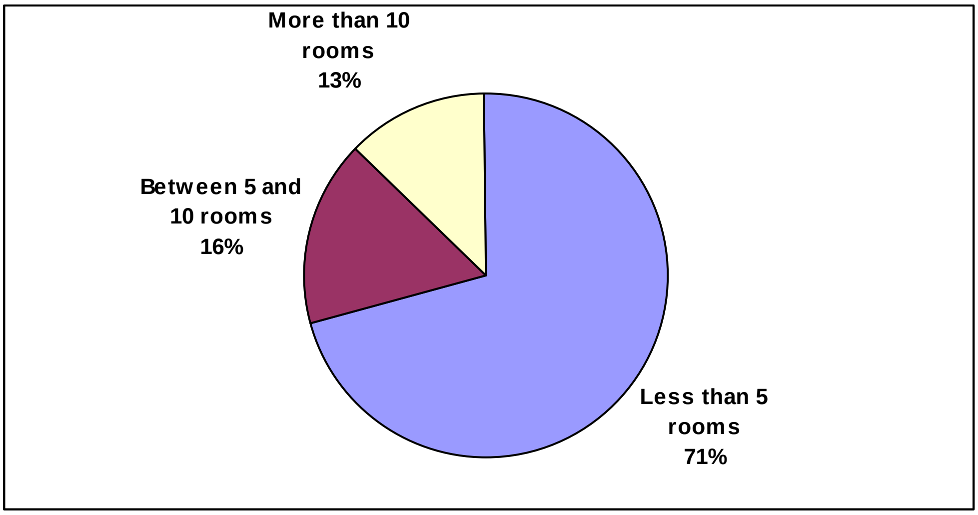
There are three establishments in Salisbury with more than 50 bedrooms, representing around 2% of the total, although the area's accommodation capacity is set to increase with the addition of a new hotel at Solstice Park, which will provide some 88 bedrooms.

Table 17: Accommodation Stock by Establishment Size (Number of Rooms)

Bedrooms	Number of establishments	Percent of total stock (%)
1	10	5.0
2	60	29.9
3	54	26.9
4	18	9.0
5-9	33	16.4
10-19	12	6.0
20-49	11	5.5
50+	3	1.5
Total	**201**	**100.0**

NB: The above table includes all establishments for which size data was available (a total of 201 out of Salisbury's 272 establishments)

Fig k) Total Accommodation Stock by Establishment Size (Number of Rooms)



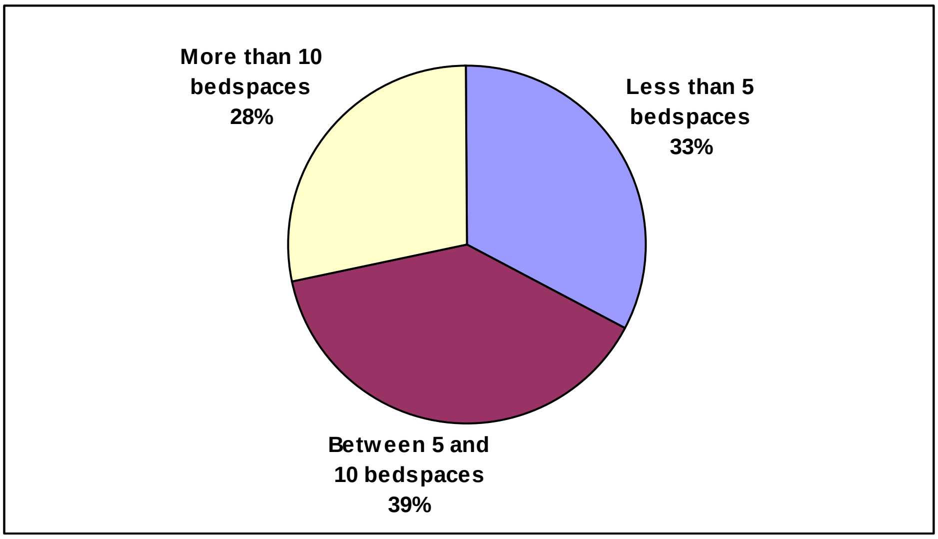
33% of Salisbury's bedspace capacity is provided by establishments offering fewer than 5 bedspaces. Establishments providing between 5 and 10 bedspaces represent 39% of the city's accommodation capacity, and establishments providing more than 10 bedspaces represent 28%.

Table 18: Accommodation Stock by Establishment Size (Number of Bedspaces)

Bedspaces	**Number of establishments**	**Percent of total stock (%)**
1	2	1.0
2	7	3.5
3	11	5.5
4	46	22.9
5-9	78	38.8
10-19	27	13.4
20-49	17	8.5
50+	13	6.5
Total	**201**	**100.0**

NB: The above table includes all establishments for which size data was available (a total of 201 out of Salisbury's 272 establishments)

Fig I) Total Accommodation Stock by Establishment Size (Number of Rooms)



7.5: Accommodation by Quality Rating

The most common maximum rating given to accommodation in Salisbury was 4 stars / diamonds (47% of establishments), followed by 3 stars / diamonds (39%). 10% of accommodation establishments had a maximum rating of 2 stars / diamonds. 4% of establishments had a maximum rating of 5 stars / diamonds, all of which were B&Bs apart from one 5 star rated self catering establishment.

Table 19: Accommodation Establishment Max Rating

Rating	Number of star rated establishments	Percent (%)	Number of diamond rated establishments	Percent (%)	Overall Percentage (%)
1	0	0.0	0	0.0	**0.0**
2	9	17.0	4	4.8	**9.6**
3	21	39.6	32	38.6	**39.0**
4	22	41.5	42	50.6	**47.1**
5	1	1.9	5	6.0	**4.4**
Total	**53**	**100**	**83**	**100**	**100%**

The maximum rating refers to the highest of AA, RAC or Visit Britain ratings received by an establishment. It should be noted that only those establishments that are inspected are included in this analysis, and unrated establishments are excluded. In addition, the AA, RAC and Visit Britain ratings have recently been reviewed in order to provide one "overall" star rating for hotels, or diamond rating for guest accommodation, as follows:

Five Stars	Five Diamonds
A spacious, luxurious establishment offering the highest international quality of accommodation, facilities, services and cuisine. A wider range of extra facilities. Guests are very well cared for by professional, attentive staff providing flawless guest services.	An excellent overall level of quality. For example, ample space with a degree of luxury, an excellent quality bed, high quality furniture, excellent interior design. Breakfast offering a wide choice of high quality fresh ingredients; other meals, where provided, featuring fresh, seasonal local ingredients. Excellent levels of customer care, anticipating guests' needs.
Four Stars	**Four Diamonds**
Accommodation offering superior comfort and quality; all bedrooms with en-suite bath, fitted overhead shower and WC. Spacious and well appointed public areas. More emphasis on food and drink. Room service of all meals and 24 hour drinks, refreshments and snacks. Dry cleaning service available. Excellent customer service.	A very good overall level of quality in all areas and customer care showing very good levels of attention to guests' needs.
Three Stars	**Three Diamonds**
Higher standard of services and facilities including larger public areas and bedrooms, a receptionist, room service, laundry service.	A good overall level of quality. For example, good quality, comfortable bedrooms; well maintained, practical decor; a good choice of quality breakfast items available. A good degree of comfort provided, with good levels of customer care
Two Stars	**Two Diamonds**
Equipped bedrooms, all with ensuite/private bathroom and a colour TV. A lift is often available. Dinner available.	A sound overall level of quality and customer care in all areas
One Star	**One Diamond**
Practical accommodation with a limited range of facilities and services, but a high standard of cleanliness throughout. Restaurant/eating area for breakfast at least. 75% of bedrooms will have en-suite or private facilities.	Clean accommodation, providing acceptable comfort with functional decor and offering, as a minimum, a full cooked or continental breakfast. Comfortable beds, with clean bed linen and towels and fresh soap. Adequate heating and hot water available at reasonable times for baths or showers at no extra charge. An acceptable overall level of quality and helpful service.

8: Accommodation Demand

8.1: Total Staying Visitor Trips, Nights and Spend

Salisbury receives around 376,000 staying visitors per annum, representing a total of 1.3 million visitor nights. Staying visitor expenditure is approximately £56 million.

Table 20: Visitor Trips, Nights and Spend in Salisbury	
Staying Visitor Trips	376,000
Visitor Nights	1,271,000
Staying Visitor Spend	£56,242,000

Source: The Economic Impact of Tourism in Salisbury (South West Tourism, 2003)

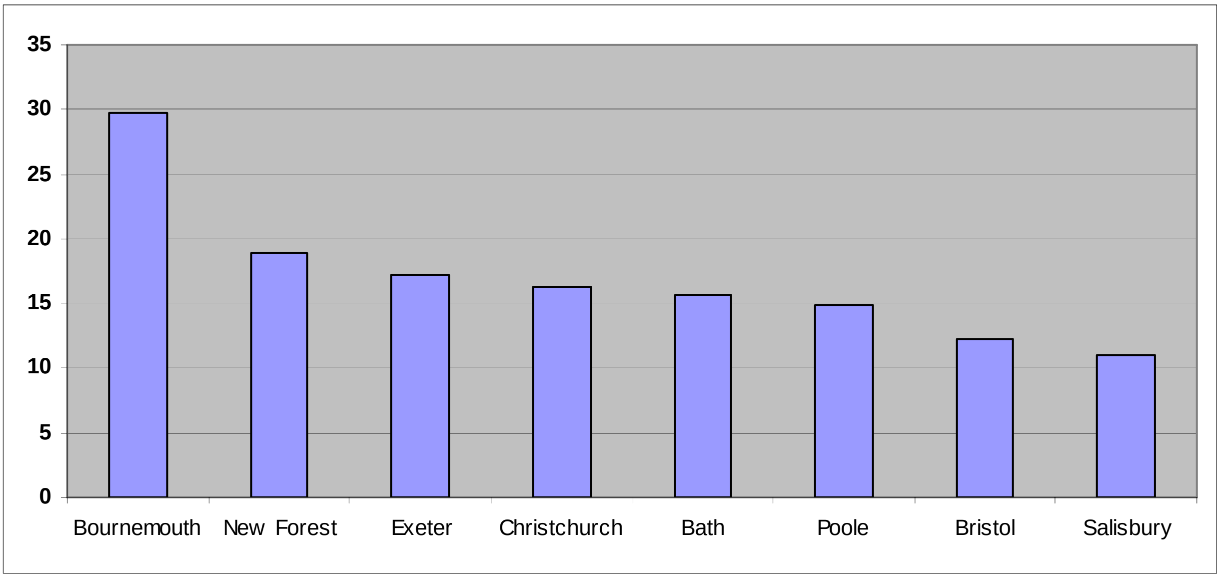
The following table shows the number of nights spent by staying visitors to Salisbury in 2003, the comparable statistics for a number of other towns and cities in southern England, and the total number of nights spent by visitors staying in Wiltshire and South West England as a whole.

In 2003, Salisbury's visitors spent a total of 1,271,000 nights in the city. In comparison, visitors to Bournemouth stayed for a total of 4,882,000 nights, a figure around 74% higher. Visitors to Bath spent a total of 2,668,000 nights in the city, 52% more nights than were spent in Salisbury. Overall, visitor nights spent in Salisbury account for a quarter (25%) of the total nights spent in Wiltshire, and 1% of the total nights spent in the South West of England.

Comparative to it's size, the number of visitor nights spent in Salisbury is roughly equivalent to destinations such as Bristol, Poole, and Bath. Salisbury's particular success in attracting short stay visitors should also be noted when considering visitor nights figures.

Table 21: Visitor Nights in Salisbury and Comparable Destinations			
Location	**Visitor Nights (2003)**	**Resident Population (2003)**	**Number of visitor nights per population head**
Bournemouth	4,882,000	163,800	**29.8**
Bristol	4,834,000	391,600	**12.3**
New Forest	3,230,000	171,300	**18.9**
Bath	2,668,000	170,900	**15.6**
Poole	2,033,000	137,700	**14.8**
Exeter	1,949,000	113,100	**17.2**
Salisbury	***1,271,000***	***116,000***	***11.0***
Christchurch	737,000	45,100	**16.3**
Wiltshire Total	**5,003,000**	/	/
South West England Total	**89,700,000**	/	/

Fig m) Staying Visitor Night Per Population Head: Salisbury and Comparable Destinations



8.2: Staying Visitor Trips by Accommodation Type

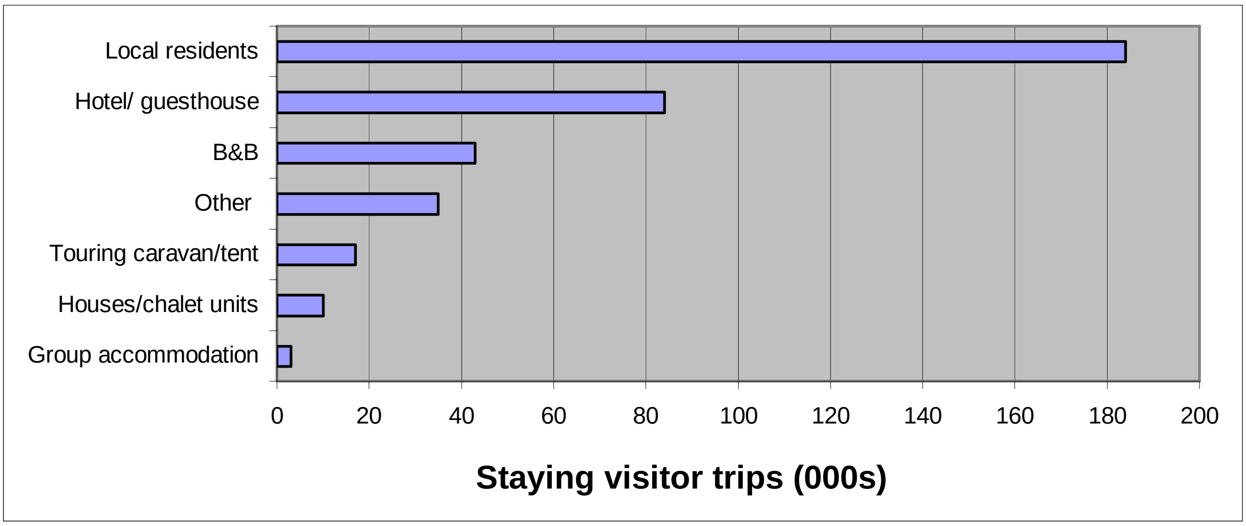
The majority of visitors to Salisbury (49%) stayed with local residents. The homes of local residents therefore represent the largest single type of accommodation used by visitors. A further 84,000 visitors (22%) stayed in hotels or guest houses, and 43,000 (11%) stayed in bed and breakfast accommodation.

Table 22: Staying visitor trips to Salisbury by accommodation type

Accommodation type	Domestic visitors		Overseas visitors		All staying visitors	
	Number	*%*	*Number*	*%*	*Number*	*%*
Local residents	166,000	53	18,000	29	184,000	49
Hotel / guesthouse	64,000	21	20,000	32	84,000	22
B&B	24,000	8	19,000	31	43,000	11
Other	32,000	10	2,000	3	35,000	9
Touring caravan/tent	15,000	5	2,000	3	17,000	5
Houses/chalet units	9,000	3	0	0	10,000	3
Group accommodation	2,000	1	1,000	2	3,000	1
Total	**312,000**	**100**	**62,000**	**100**	**376,000**	**100**

Source: The Economic Impact of Tourism in Salisbury (South West Tourism, 2003)

Fig n) Staying visitor trips by accommodation type



8.3: Staying Visitor Volume by Visit Type

The majority of staying visitor trips to Salisbury are for holiday purposes (55%), including main holidays, short breaks and additional holidays. A further 19% of trips are for business purposes and 18% are visiting friends or relatives.

Table 23: Staying visitor trips by type

	Domestic	*Domestic (%)*	Overseas	*Overseas (%)*	Total	*Total (%)*
All holidays	179,000	*57.4*	28,000	*44.4*	207,000	*55.1*
Business	60,000	*19.2*	13,000	*20.6*	73,000	*19.4*
Visiting friends or relatives	54,000	*17.3*	15,000	*23.8*	69,000	*18.4*
Other	20,000	*6.4*	2,000	*3.2*	22,000	*5.9*
Language school	0	*0.0*	5,000	*7.9*	5,000	*1.3*
Total	**312,000**	***100.0***	**63,000**	***100.0***	**376,000**	***100.0***

Source: The Economic Impact of Tourism in Salisbury (South West Tourism 2003)

42% of nights spent in Salisbury are for holiday purposes, and 25% are visiting friends or relatives. A further 16% of nights are spent on business, 14% at language schools, and 3% for other purposes.

Table 24: Staying visitor nights by type

	Domestic	Domestic (%)	Overseas	Overseas (%)	Total	Total (%)
All holidays	416,000	51.1	111,000	24.2	527,000	41.5
Business	144,000	17.7	62,000	13.5	206,000	16.2
Visiting friends or relatives	235,000	28.9	87,000	19.0	322,000	25.3
Other	19,000	2.3	20,000	4.4	40,000	3.1
Language school	0	0.0	177,000	38.6	177,000	13.9
Total	**814,000**	**100.0**	**458,000**	**100.0**	**1,271,000**	**100.0**

Source: The Economic Impact of Tourism in Salisbury (South West Tourism 2003)

Fig o) Staying visitor trips by type

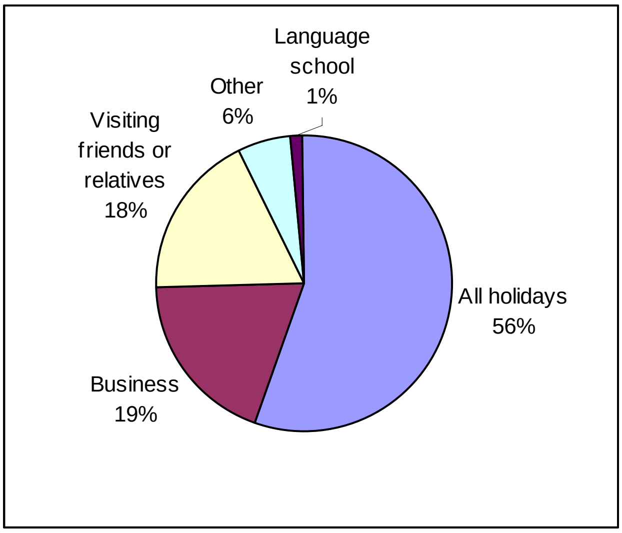
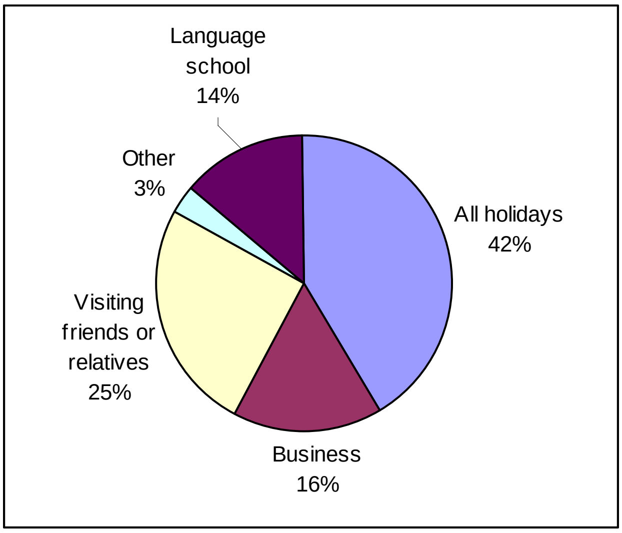


Fig p) Staying visitor nights by type



8.4: Length of Stay

The average length of stay of visitors to Salisbury is estimated by South West Tourism to be around 3.4 nights. Visitor surveys undertaken by the Market Research Group endorse this conclusion.

Table 25: Length of Stay by Trip Type

	Domestic	Overseas	Total
Long holidays (4+ nights)	5.1	-	-
Short holidays (1-3 nights)	1.0	-	-
All holidays	**2.3**	**4.0**	**2.5**
Business	2.4	4.8	2.8
Friends/relatives	4.4	5.8	4.7
Other	1.0	10.0	1.8
Language school	0.0	35.4	35.4
Total	**2.6**	**7.3**	**3.4**

Source: The Economic Impact of Tourism in Salisbury (South West Tourism 2003)

Fig q) Length of Stay by Trip Type

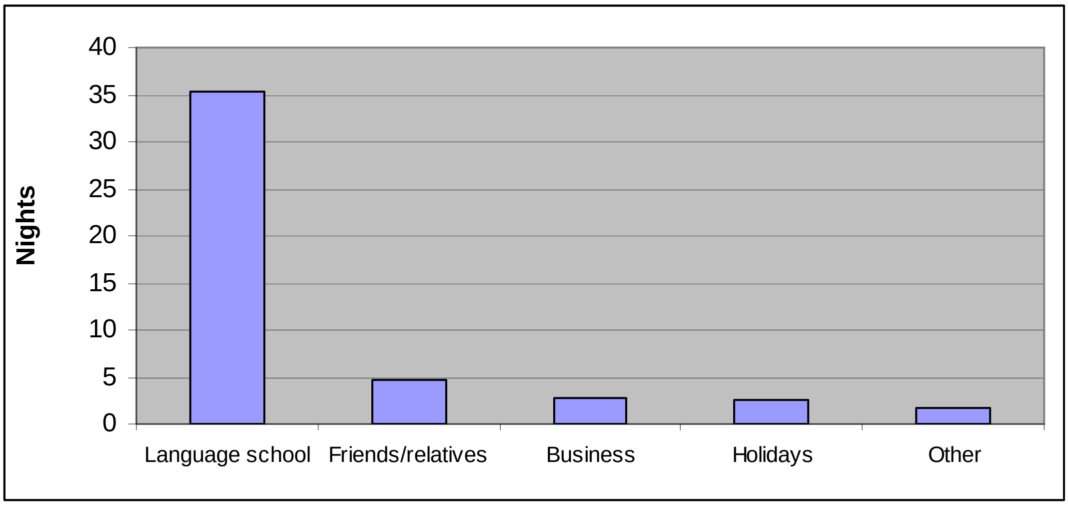


Table 26: Length of Stay

Base: All staying visitors	Frequency	Percent (%)
1 night	26	**32.5**
2-3 nights	38	**47.6**
4-7 nights	10	**6.3**
More than 7 nights	2	**2.6**
Total	**80**	**100.0**

Source: Visitor Survey 2005, The Market Research Group

9: Accommodation Supply / Demand Analysis

9.1: Accommodation Occupancy Rates

Unfortunately there are no room or bed occupancy rates currently available for Salisbury. The table below therefore offers a comparison of rates with Wiltshire, the closest relevant statistic. It should be noted, however, that anecdotal evidence from visitors and relevant organisations in the public and private sector suggests an undercapacity of accommodation in Salisbury (*see section 10*).

The various destinations analysed were selected for comparison as these were the most appropriate destinations for which relevant data was available.

Room occupancy in serviced accommodation in Wiltshire in 2003 stood at 63%. This figure is only 3% lower than the comparable statistic for Bournemouth (66%), but is 4% higher than room occupancy for the South West as a whole.

Bed occupancy rates in serviced accommodation in Wiltshire in 2003 stood at 43%. This figure is 8% lower than bed occupancy rates in Bournemouth, and 3% lower than bed occupancy for the whole of the South West.

The final column illustrates the ratio of room occupancy rates to bedspace occupancy: for example, a ratio of 1.47 illustrates that room occupancy is 47% higher than bed occupancy. A higher ratio suggests that multiple occupancy rooms are being under utilised. This may be due to visitors travelling alone (for example, business visitors) occupying double or twin rooms, perhaps due to difficulty in finding suitable single rooms.

The room:bedspace occupancy ratio for Wiltshire is comparable with Poole, but significantly higher than both Bournemouth and the South West England average, suggesting a relatively high under-utilisation of multiple occupancy rooms.

Table 27: Accommodation Occupancy Rates

Area	Bedspace Occupancy (2003)	Room Occupancy (2003)	Room:Bedspace Occupancy Ratio
Wiltshire	***43%***	***63%***	***1.47***
Poole	50%	75%	1.50
Bournemouth	51%	66%	1.29
Christchurch	n/a	54%	N/a
New Forest	55%	n/a	N/a
South West England	46%	59%	1.28

9.2: Visitor Perceptions of Accommodation Supply

The following table shows the net level of agreement with various statements regarding accommodation expressed by visitors to Salisbury.

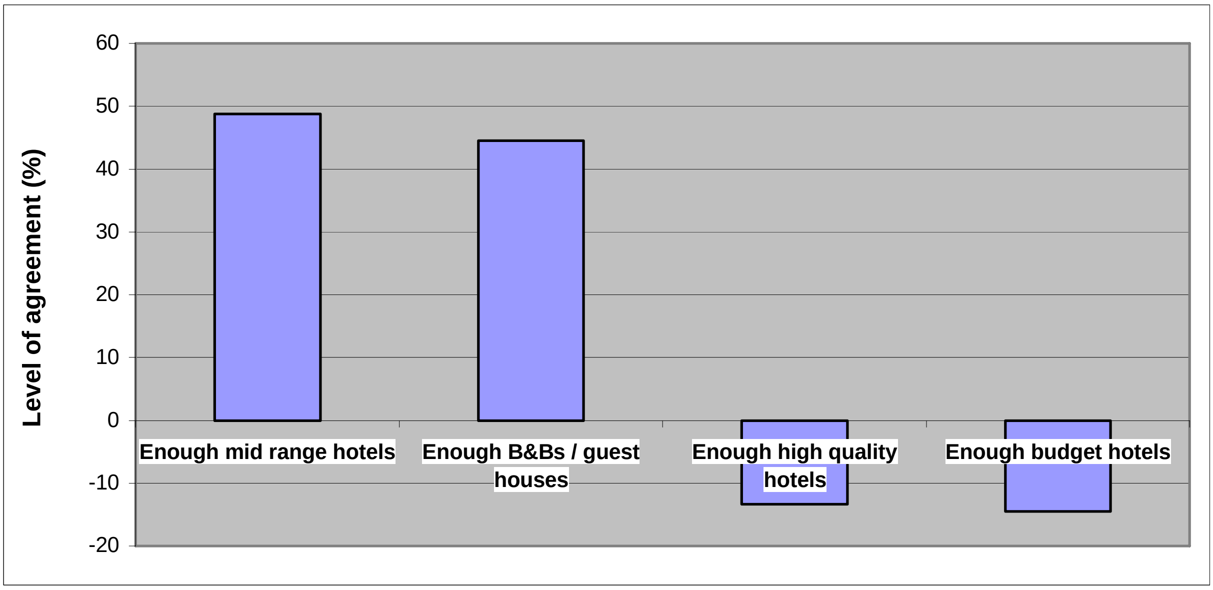
A positive number shows that more visitors agreed with the statement than disagreed; the higher the number, therefore, the higher the overall level of agreement. Conversely, a negative number shows that more visitors disagreed with the statement than agreed; the lower the number, therefore, the higher the overall level of disagreement.

Visitors to Salisbury generally agreed that there was enough bed and breakfast, guest house and mid range hotel accommodation in the city. However, they disagreed that there was enough high quality and budget accommodation.

Table 28: Visitor perceptions of accommodation supply

	Net level of agreement with statement (% agree minus % disagree)
There is enough mid range hotel accommodation in Salisbury	48.8
There is enough bed and breakfast / guest house accommodation in Salisbury	44.5
There is enough high quality hotel accommodation in Salisbury	-13.4
There is enough budget hotel accommodation in Salisbury	-14.5

Fig r) Visitor Perceptions of Accommodation Supply



9.3: Supply / Demand by Accommodation Cost

Bedspace supply and demand in percentage terms has been modelled into four cost bands, up to £20, between £20 and £40, between £40 and £60 and more than £60. This clarifies the simple supply/demand analysis and emphasises the situation outlined in section 9.2 above, where there is considered, by respondents, to be insufficient budget and high quality hotel accommodation.

Demand has been calculated based on accommodation used by visitors to Salisbury (see table 7). The demand figures are based on average expenditure per person per night, and do not therefore refer solely to room rates; for example, it includes visitors staying with friends or relatives, or groups staying in multiple occupancy self-catering units.

Table 29: Supply / Demand by Accommodation Cost

Cost per person per night	**Supply* (%)**	**Demand** (%)**
Up to £20	9.6	34.8
Between £20 and £40	39.0	28.3
Between £40 and £60	47.1	21.7
More than £60	4.4	15.2
Total	**100.0**	**100.0**

*Source: South West Tourism, 2001
** Source: The Market Research Group, 2005

9.4: Accommodation Demand and Supply

Bedspace supply and demand in percentage terms has been modelled into three categories: B&B / guest house, hotel / inn and self-catering. The data suggests an under-capacity in the B&B / guest house sectors, and a surplus of capacity in the hotel sector. The research therefore suggests that:

- There may not be enough B&Bs in Salisbury to satisfy demand.
- There may be too many hotels in Salisbury than are necessary to satisfy demand.

This in turn implies a number of further conclusions:

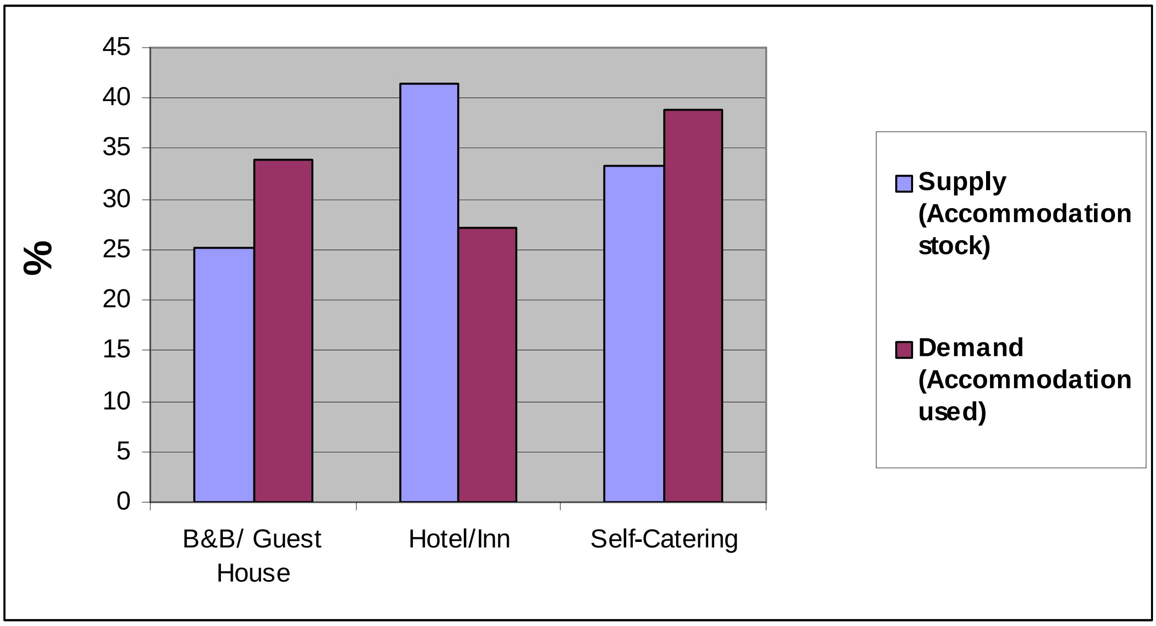
1) Visitors wishing to stay in hotels may be unable to find suitable accommodation (quality, price, location etc.) and use other accommodation types instead.
2) Visitors staying in B&B / guest house or self catering accommodation may have problems finding available spaces in their chosen establishment type.
3) There may be a fundamental imbalance between the type of accommodation demanded by visitors and the type of accommodation available in Salisbury.

Table 30: Supply / Demand for Accommodation (%)

	Bedspace Supply (accommodation stock %)	**Bedspace Demand (accommodation used %)**
B&B/ Guest House	25.1	33.9
Hotel/Inn	41.4	27.2
Self-Catering	33.4	38.9
Total	**100.0**	**100.0**

Source: South West Tourism 2001
****Source: The Market Research Group 2005***

Fig s) Supply and Demand of Accommodation in Salisbury



10: Business and Stakeholder Feedback

10.1: Tourism Organisations

The following is a summary of interviews conducted with professionals employed in providing visitor information services to those visiting Salisbury. The analysis is based on anecdotal evidence from the opinions of individuals based on their everyday experience of the tourism sector.

The Visitor Market

Salisbury's visitor market is fairly robust. The city benefits from its location on the overseas visitor route of "historical England" (London, Winchester, Salisbury, Bath etc.). The historical nature of many of Salisbury's attractions also ensures a robust day visitor and short break market.

Nonetheless, there is a feeling that there may be a need for more indoor attractions suitable for children, in addition to an Internet café. There is some uncertainty whether a large leisure development such as a "megabowl" type bowling alley, a multiplex cinema or a multi-purpose leisure centre would be a significant factor in the tourism market.

Accommodation

There is a feeling that Salisbury is short on accommodation – rooms book up quickly at certain times of the year, and visitors on long holidays may have to stay in more than one place during their visit. In particular, there is a lack of single rooms at the budget end of the market, and possibly a backpacker's hostel which may attract younger visitors.

10.2: Local Businesses

The following is a summary of interviews conducted with professionals employed by local businesses providing tourism services to visitors to Salisbury. The analysis is based on anecdotal evidence from the opinions of individuals based on their everyday experience of the tourism sector.

Current Levels of Business

At present there appears to be some variation in levels of trade experienced by businesses in Salisbury. Whilst local attractions are seemingly continuing to benefit from the day trip market, many members of the catering and hospitality trades feel that their business is experiencing a lull.

A number of respondents have observed, in particular, a reduction in the number of overseas visitors to Salisbury - especially visitors from the US, as the weakness of the dollar against the pound makes the trip much more expensive.

Nevertheless, the general perception for the future is that business is steady, rather than showing many signs of a significant rise or fall.

Key Markets

Generally, it appears that the key visitor market for many businesses in Salisbury is adults, aged between 40 and 60 years of age.

However, a number of respondents are currently working towards the aim of attracting a younger, more family orientated market.

Regarding length of stay, the majority of respondents felt that their key market was short term, and day visitors, rather than long break tourists.

Accommodation Provision

Overall, opinion was mixed as to the extent of visitor accommodation in Salisbury, although most businesses felt that the number of providers was sufficient for the size of the market.

In terms of specific types of accommodation, respondents tended to feel that provision at a Bed and Breakfast level in particular was sufficient to accommodate visitors to the city.

Instead, where they felt provision was lacking was less in terms of the number of hotels, but more in terms of the value for money of those currently available.

Some also felt that there needed to be an increase in provision for coach parties, and business people, which would encourage them to stay and spend in Salisbury, rather than passing through to other, more accommodating cities.

One other significant issue that continually came to the fore was the possible introduction of a five-star hotel to the city. The majority of those who commented felt that, in Salisbury, a five-star hotel was an unnecessary addition, either because it would add to the struggles faced by the current provision, or because it would not appeal to the city's core visitor market.

General Comments

Initial ideas suggested by the respondents were practical improvements, related to the surrounding infrastructure of tourism in and around the city.

Firstly, there was a call for signposting around the city centre, highlighting visitor attractions and, in particular, clarifying the route through from the train station to the key tourist areas.

Respondents would also like to see improvements that would help visitors to Salisbury also explore the attractions of the surrounding area - and consequentially encourage additional reciprocal trade.

In terms of new facilities, the main idea to emerge from the interviews was the relative lack of night-time activities in the city.

Many respondents felt that perhaps the most productive way of addressing local issues, and working to improve tourism in the town would be to increase communication and working practice between the District Council and the local tourism trade.

Finally, the respondents were asked if they would like to offer any further comment in regard to leisure and tourism development in Salisbury. Their responses covered a range of issues, and helped to re-iterate a number of the concerns raised previously, including signage, transport links, and providing additional facilities to encourage tourists to stay longer in the city.

11: Conclusions and Recommendations

11.1: The Visitor Accommodation Sector

There may be perceived gaps and deficiencies in the visitor accommodation sector.

The picture on visitor accommodation is mixed. Whilst it appears that at the time the research was conducted there was sufficient accommodation in Salisbury, further investigation suggests that at certain times there may be insufficient bedspace capacity. Whilst visitors may be able to find accommodation in the end, it may of a type or in a location that detracts from their overall experience.

The research suggests that whilst there may be sufficient mid-range accommodation, there is insufficient supply at both ends of the market; i.e. there is insufficient budget, self-catering, and high quality accommodation. UK research conducted by Mintel suggests that there has been a “polarisation” of the accommodation market, with customers now wanting either “cheap and cheerful” accommodation, or willing to pay more for accommodation at the “high end” of the market. Together, these findings suggest that Salisbury may not have reacted to market trends as successfully as it may have done.

11.2: The Business Visitor Market

There is a demand for better provision of business and conference facilities.

There appear to be significant gaps in Salisbury's provision for business and conference visitors, which may undermine the stability or future growth of a very significant proportion of the visitor market (business visitors account for around one-fifth of Salisbury's visitors).

There appears to be a feeling amongst businesses that Salisbury can accommodate smaller events (although this may be due to businesses arranging their own facilities, including accommodation) but is deficient when it comes to hosting larger events, particularly with respect to a conference venue of a suitable size and quality.

In addition, there appears to be a lack of high quality accommodation that business visitors may be more likely to use. In addition, business guests may have problems finding the range or standard of restaurants and other places to eat that they may be looking for, and this may be to the detriment of their experience.

11.3: "Sensitive Development"

It is important that any development is sensitive to the character of Salisbury.

Salisbury is attractive to visitors in large part because of its historical attractions, its reputation as a traditional city, and it's "unspoilt charm". Residents are also enamoured with this aspect of the city. Visitors and residents alike agree that any development should be sensitive to this. It is possible that insensitive development may have significant impacts on the visitor market.

Salisbury is on the "historical" trail of towns, cities and locations that attract tourists, particularly from overseas. In particular, Stonehenge is a major factor in attracting this type of visitor to the area. Insensitive development would, in many cases, detract from the overall visitor experience. Nonetheless, it is important to note that, as highlighted above, *under* development may also detract from the visitor experience. It is likely that the balance lies in the gradual enhancement and addition of smaller "leisure" facilities, ensuring that such development remains sensitive both to the immediate environment and the overall "character" of the city. The impact on the visitor market of developing major, resident-focused leisure facilities is less certain, and dependent on unknown factors such as site location, and the extent to which any such development is self-contained, or integrated into the local environment.

Appendices

Appendix A: The Survey Questionnaire

The survey questionnaire was constructed for use by face-to-face interviewers in Salisbury to capture data from residents, day visitors and staying visitors alike.

Salisbury Visitor Survey 2005

Q1 Please tell us where you live.

Town .... [ ]

County (Country if not UK) [ ]

Q2 Have you come from your home address today?

Yes .... [ ]

No .... [ ]

Q3 Are you returning to your home address today?

Yes .... [ ]

No .... [ ]

If in Salisbury for a day trip from home (YES TO Q2 AND Q3), go to Q9

Q4 What type of accommodation are you staying in?

Hotel .... [ ]

Bed and Breakfast / Guest House .... [ ]

Self catering .... [ ]

Home of a friend or relative .... [ ]

Other .... [ ]

Q5 Approximately how much does your accommodation cost, per person per night?

[ ]

Q6 How many nights are you staying in Salisbury?

[ ]

Q7 How would you rate the following aspects of the accommodation you are staying in

	Very good	*Fairly good*	*Average*	*Fairly poor*	*Very poor*
Value for money	[ ]	[ ]	[ ]	[ ]	[ ]
Cleanliness	[ ]	[ ]	[ ]	[ ]	[ ]
Quality of service	[ ]	[ ]	[ ]	[ ]	[ ]
Availability (i.e. how easy it was to find and book)	[ ]	[ ]	[ ]	[ ]	[ ]

Q8 Are you in Salisbury for..

Main holiday .... [ ]

Short break / additional holiday .... [ ]

Visiting friends or relatives .... [ ]

Business .... [ ]

Q9 From your general impressions of Salisbury, or from first hand experience, please tell us whether you agree or disagree with the following statements

	Very easy	*Fairly easy*	*Average*	*Fairly difficult*	*Very difficult*
There is enough high quality hotel accommodation in Salisbury	[ ]	[ ]	[ ]	[ ]	[ ]
There is enough mid range hotel accommodation in Salisbury	[ ]	[ ]	[ ]	[ ]	[ ]
There is enough budget hotel accommodation in Salisbury	[ ]	[ ]	[ ]	[ ]	[ ]
There is enough bed and breakfast / guest house accommodation in Salisbury	[ ]	[ ]	[ ]	[ ]	[ ]

Q10 **FOR VISITORS. Which of the following leisure facilities have you used (or intend to use) during your visit to Salisbury? (tick all that apply)**

- *Museums / galleries* ☐
- *Pubs, bars* ☐
- *Cafes, restaurants* ☐
- *Sporting facilities* ☐
- *Theatre* ☐
- *Swimming pool* ☐
- *Cinema* ☐

Q11 **FOR RESIDENTS / DAY VISITORS. How often do you use the following facilities? (tick one on each line only)**

	Every week	*Every few weeks*	*Every month or so*	*Every few months*	*Once or twice a year*	*Once a year or less often*
Museums / galleries	☐	☐	☐	☐	☐	☐
Pubs / bars	☐	☐	☐	☐	☐	☐
Cafes / restaurants	☐	☐	☐	☐	☐	☐
Sporting facilities	☐	☐	☐	☐	☐	☐
Theatre	☐	☐	☐	☐	☐	☐
Swimming pool	☐	☐	☐	☐	☐	☐
Cinema	☐	☐	☐	☐	☐	☐

Q12 **FOR VISITORS: Which of the following places have you / do you intend to visit during your stay in Salisbury?**

- *Bournemouth* ☐
- *Poole* ☐
- *Basingstoke* ☐
- *Winchester* ☐
- *Southampton* ☐
- *Andover* ☐

Q13 **FOR RESIDENTS / DAY VISITORS. How often do you visit the following places to use leisure facilities?**

	Every week	*Every few weeks*	*Every month or so*	*Every few months*	*Once or twice a year*	*Once a year or less often*
Bournemouth	☐	☐	☐	☐	☐	☐
Poole	☐	☐	☐	☐	☐	☐
Basingstoke	☐	☐	☐	☐	☐	☐
Winchester	☐	☐	☐	☐	☐	☐
Southampton	☐	☐	☐	☐	☐	☐
Andover	☐	☐	☐	☐	☐	☐

Q14 Please tell us whether you agree or disagree with the following statements.

	Strongly agree	*Agree*	*Disagree*	*Strongly disagree*	*No opinion / don't know*
Salisbury needs more leisure facilities or attractions	☐	☐	☐	☐	☐
Underdevelopment is part of Salisbury's appeal	☐	☐	☐	☐	☐
It is important that any development in Salisbury does not detract from it's "unspoilt" appeal	☐	☐	☐	☐	☐
There are plenty of leisure facilities and attractions in Salisbury	☐	☐	☐	☐	☐
You can find leisure facilities or attractions in other places nearby if they are not available in Salisbury itself	☐	☐	☐	☐	☐
Finding a car parking space in Salisbury is easy	☐	☐	☐	☐	☐
Salisbury is easy to get around on public transport	☐	☐	☐	☐	☐

Q15 Please tell us which, if any, of the following developments you would like to see in Salisbury

- *A multiplex cinema* ☐
- *A bowling alley* ☐
- *A sports / leisure centre (gym, squash courts, swimming pool etc.)* ☐
- *More nightlife (bars, clubs)* ☐
- *A greater range of restaurants and other places to eat* ☐
- *More museums or galleries* ☐
- *More sporting facilities* ☐
- *More theatres / live arts venues* ☐
- *Better transport infrastructure* ☐
- *Increased provision of business / conference facilities* ☐

Q16 Gender of main respondent

- *Male* ☐
- *Female* ☐

Q17 Age of main respondent

- *16 - 19 years* ☐
- *20 - 29 years* ☐
- *30 - 59 years* ☐
- *60 - 74 years* ☐
- *75 or over* ☐

Q18 Group composition (write in number of each)

	Male	*Female*
Under 16	☐	☐
16 - 19 years	☐	☐
20 - 29 years	☐	☐
30 - 59 years	☐	☐
60 - 74 years	☐	☐
75 or over	☐	☐

Q19 Occupation of main wage earner in household

Q20 If you have any other comments regarding accommodation / leisure facilities in Salisbury, please tell us.

Appendix B: Interview Discussion Guide Used For Leisure and Business Interviews

The discussion guides were used as a topic framework for semi-structured interview conversations with relevant individuals in which digression was encouraged.

Salisbury Business & Conference Discussion Guide

1) How is business? (a-This year / recently. b- long term trends)

2) What are your opinions of Salisbury as a place to host business / conference etc.? How does it compare with other places (e.g. Bournemouth)? How do you rate the quality / quantity of facilities? And accommodation for business visitors?

3) Do you get the impression that visitors to Salisbury can find enough things to do?

4) Do you get the impression that visitors to Salisbury can find the type of accommodation they need? (particularly business visitors)

5) What effect do you feel the supporting infrastructure in Salisbury has on your business? (e.g. car parking, public transport etc.). Could it be improved? If so, how?

6) What recommendations would you make to Salisbury District Council about the way in which Salisbury generally should develop? (with specific reference to provision of facilities and accommodation for business / conference) Are there any particular problems that your sector faces?

7) Do you have anything else you would like to say about business and conference provision (including accommodation) in Salisbury?

Appendix C: List of Tables

Appendix D: List of Figures