A review of hotel and conference facilities in the Salisbury district

A report to the working group of the
Planning and Economic Development
Overview and Scrutiny Panel

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Salisbury District Council

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1.0 Introduction

The purpose of this report is to present research findings and make recommendations to the working group on the review of hotel and conference facilities in the Salisbury district.

Please note - this report provides a brief summary of the review. Details of specific research undertaken / evaluated is attached as appendices.

2.0 Background and context

As part of it's work programme for 2005/6, the Planning and Economic Development Overview and Scrutiny Panel identified the need to review the provision of hotel and conference facilities in the Salisbury district. A member working group was formed, led by Councillors Alan Peach and Mrs Chettleburgh, and the council's economic development service were asked to provide support.

Following an inception meeting, a methodology for the review was produced. It was agreed that, whilst members' particular focus was on hotel and conference facilities, this must be considered in the wider context of local accommodation supply and demand, and visitor facilities in general.

It was agreed that of key importance was the need to establish the demand and supply for such facilities, in order to be able to make any proposals for the future.

The key aims of the review were agreed as:

a. To inform and provide evidence for the Local Development Framework planning process.

b. To provide evidence for strategic development of the local tourism product.

3.0 Summary of review methodology

There were three main parts of the review, as outlined below. A full summary of all research undertaken or evaluated can be found at Appendix I.

a. Primary research - This included the use of external research specialists to evaluate provision of existing accommodation and leisure facilities in Salisbury. Direct research was also undertaken by the council with existing local accommodation and conference facility providers and UK group travel operators.

b. Secondary research - There are a great number of existing research documents and strategic plans relevant to this review. These were identified (at both a local and regional level) and evaluated as part of this review.

c. Consultation - Including face-to-face interviews with representatives from Salisbury Tourism Partnership and local accommodation / conference facility providers.

4.0 Summary of review findings

4.1 Existing provision of hotel accommodation in the Salisbury district

Research was undertaken in early 2006 to determine the existing provision of hotel (including larger guesthouses) accommodation in the Salisbury district (see Appendix IV). The largest hotels were also interviewed individually (see Appendix VI). As part of this review, representatives of the Salisbury Tourism Partnership met with the scrutiny review members – notes of these discussions are attached at Appendix VII.

Most providers have been established for over 20 years and many have carried out some form of infrastructure development in the last 5 years, or intend to do so in the future. Overall, the main customers for short term stays are corporate, and for longer stays are foreign tourists.

In terms of business activity (corporate versus tourism visitors), response was mixed and a trend was not apparent. Some establishments have secured repeat custom from a small number of corporate clients and this represents the majority of their business trade.

Again, there was no consensus as to the level of ‘sufficient’ accommodation supply in Salisbury. Whilst some felt that there was already enough, there was a concession made that there could be a market for a very high quality ‘boutique’ style hotel, with associated leisure facilities. In addition, there appear to be specific times of the year when Salisbury could benefit from more bed spaces. This is supported by anecdotal evidence from local event organisers and from the Tourist Information Centre who often struggle to find appropriate accommodation, especially in summer months.

To be a ‘four star’ or larger hotel was an aspiration of more than one of the existing three star accommodation providers. The owner/mangers were united in their concerns about the constraints that historic properties bring to running a modern business, and the financial costs of addressing this to protect and enhance the environment. However, they also conceded that the historic setting is also the major attraction of Salisbury as a destination.

There is anxiety among some hotels that any proposals for new accommodation will saturate the market and harm the viability of existing business. However, this concern is not true of all hotels – businesses who were confident in their own service said they would monitor, but were ‘not worried’ about any potential impact. It was apparent that there is no local industry consensus on this issue.

It was discovered that there are many rumours about ‘new hotel development’ (even to the extent of sites being named) being spread among some of the local hotel providers, many of whom work closely to support each others business, rather than against each other. None of these rumours have any truth, but it has resulted in there being some mistrust between the businesses and ‘the council’. Communication and consultation by the council of any potential policies related to hotel / accommodation provision should therefore be dealt with sensitively and inclusively.

However, despite concern over competition from any proposals for ‘new’ hotels in the area, more than one current provider expressed an ambition to actually be able to run any such new business. It appears that there is acknowledgment that a new smaller hotel (30/40 bedrooms) providing a niche high quality service could viably meet a certain target market and not necessarily adversely impact on existing trade.

4.2 Existing provision of conference facilities in the Salisbury district

Research was undertaken in early 2006 to determine the existing provision of conference facilities in the Salisbury district (see Appendix V).

There are at least 47 venues offering conference facilities of varying styles and size in the Salisbury district. The largest venues, in terms of maximum delegate capacity, are the City Hall, Salisbury (953), the Odeon, Salisbury (471), the Guildhall, Salisbury (200) and the Bibury Suite at Salisbury Racecourse (200) – none of which provide on-site accommodation. Less than half of all venues provide accommodation.

Ownership of the larger venues is a mix of private businesses and public bodies such as the district council and education establishments.

Overall, half of customers using the venues are corporate and half are private/social.

The majority of venues have been established for over 21 years. Over half of the respondents expect to undertake infrastructure development and increase employee numbers in the next 5 years.

Face-to-face interviews carried out with venues (see Appendix VI) found that for many businesses in the city, any aspirations to expand their conference market were constrained by limitations of historic properties, and the cost/benefit decision of using any extra space for bedrooms or other uses.

Of some concern was the fact that many conference venues rely on just one or very few key customers for the majority of their income. Specifically for the district council's Guildhall and City Hall venues, there appeared to be much scope to expand business and increase income if a more focussed and commercial approach was taken. For other venues, there appears to be almost always a balance to be struck between being a venue for conferences, as opposed to other uses (often more important or income generating) such as providing education or accommodation. However, there was one city business that stood out as being both historically proud and also forward thinking, and which did appear to make the best of all its assets with success.

4.3 Visitor demands and satisfaction

Salisbury tourism visitors

Tourism is an essential part of the Salisbury economy. Direct spending in south Wiltshire (2003) was just over £146 million and supported over 5000 jobs (Appendix X).

Research was undertaken in 2005 to examine the demand and supply of accommodation in the Salisbury District (Appendix II). Visitors tend to agree that there are enough B&B's and mid-range accommodation in Salisbury, although they were less sure if there was enough high quality or budget provision.

A survey of UK group travel operators was undertaken in 2006 (see Appendix IX). Respondents views of Salisbury as a destination were mainly 'good' or 'very good'. 20% felt that Salisbury would be more attractive if it offered more or larger accommodation. Over a quarter of the travel operators felt that a 100 bedroom high quality hotel would be a fundamental improvement, although 35% disagreed.

Whilst there are 2600 bed spaces in Salisbury (South West Tourism, 2003), there is evidence to suggest a lack of supply in the budget and high quality ends of the markets, relative to demand.

Consultation on the south Wiltshire tourism strategy (Appendix XI) also attracted support for 'boutique' style hotels (at the high quality end of the market) and good quality low cost accommodation.

Salisbury business visitors

It is estimated that Salisbury receives about 73,000 business visitors per year (Appendix II). This represents 19% of the total visitor market, compared to Bournemouth where business visitors represent 12% of the total market.

Salisbury offers a number of venues for smaller business events, but is unsuitable for larger events. For example, it could not compete with Bournemouth's International Centre or Southampton's St Mary's Stadium.

The key consideration therefore should be 'where does Salisbury position itself in the business visitor market?'. Does it necessarily wish to compete with larger destinations, or does it already offer an alternative and bespoke niche that could be further exploited?

Business visitors require more high quality accommodation and a greater range and quality of other facilities than is currently available in Salisbury (Appendix II). This is supported by comments from interviews with some conference facility providers (Appendix VI) – they require the higher quality accommodation (not necessarily large scale, about 30/40 bedrooms) to complement their offering and their potential market share may be stifled without it.

In addition, anecdotal evidence (via the South Wiltshire Economic Partnership) from some larger local businesses, shows an unmet demand for high quality hotel accommodation. Comments suggest that visiting international clients or senior business managers would expect an extremely high standard of hospitality and that local businesses want to provide that as part of their overall business 'package' of being located in the Salisbury area.

Comparisons with other destinations

There is a lack of reliable and recent data to compare Salisbury with other destinations in any depth.

However, best value research currently being compiled by Tourism South East suggests that Salisbury provides a similar number of bedspaces (hotels, guest houses and hostels) to Winchester and Canterbury.

Salisbury and Winchester each have 11 hotels. In Salisbury, these 11 hotels provide 729 bedspaces, whereas in Winchester the same number of establishments provide 1275 bedspaces.

Larger cities offer a much higher number of hotels (and bedspaces) – 45 (5094) in Windsor and Maidenhead, 95 (6758) in Brighton and Hove, and 28 (4081) in Chester.

The average room occupancy (2003/04 figures) in the Salisbury district is estimated at 63%. This compares to 76% in Windsor and Maidenhead, and 71% in Winchester.

Salisbury receives over 1.3 million staying visitor nights a year. This compares to 2.8 million in Bath and 2.5 million in Windsor. Salisbury receives over 3.3 million day visitor trips a year, compared to 6.3 million in Windsor and 3.3 million in Bath.

4.4 Planning policy framework

The tourism objective of the Adopted Salisbury District Local Plan (see Appendix XIII) is 'to promote Salisbury district as a tourist destination for all types of visitors, whilst recognising the need to protect the environmental quality of the District and the quality of life for its residents'.

Policy T4 of the local plan states that the construction of new hotels will be permitted within or on the edge of settlements subject to there being no adverse impact on the vitality and viability of adjacent centres. There are a number of additional policies relating to development of new hotels under other circumstances.

There are no specific policies regarding conference facilities, although the local plan does recognise the 'increasing importance of business tourism'.

The emergence of the new Local Development Framework (LDF) provides an opportunity to review all policies relating to tourism, in the context of the wider economy.

The recently commenced work on the Salisbury Vision will provide evidence for policies of the LDF, and it would seem appropriate for the consultants to consider this review document as part of their work.

4.5 Planning proposals for hotel and conference facility development

Salisbury city

There have been no formal planning proposals in recent years for new build hotel or significant conference development in Salisbury city.

In 1999, a proposal for a 77 bedroom hotel on the London Road (S/1999/0198) was refused. This followed months of contentious debate on the potential impact on the vitality of the city and concerns from existing businesses about competition.

In 2003 a proposal to extend the White Hart Hotel (S/2003/0703) to include a health and fitness centre and 14 extra bedrooms was refused at committee. Following this decision, planning officers discussed a preferred scheme with the applicant, but no revised application has been made.

In 2003, the Milford Hall Hotel (S/2003/2432) was granted permission to convert and extend the former coach house to create a fitness suite and spa pool. Development of this has not been started. In 2005, the hotel made another application (S/2005/0360) to erect a first floor extension to create 8 extra bedrooms. This was refused on design issues and the impact on the character and setting of the Grade II* listed building.

Amesbury

Development of the first phase of a new Holiday Inn hotel at Solstice Park, Amesbury (S/2004/0777) will begin soon. The first phase will include 103 bedrooms, plus a wine bar, restaurant and conference facility, with permission for a further 49 bedrooms. This proposal attracted some concern about competition from some existing hotel businesses in the district.

There was also general concern amongst the tourism industry that visitors (particularly coach operators) would bypass Salisbury city altogether on their way to the south west.

An application is due to be submitted in spring 2006 for a private sports and leisure centre at Solstice Park. It is anticipated that this will also include provision for conference facilities.

4.6 Wider strategic economic context

Salisbury

Salisbury does not currently have a 4 star hotel, a hotel of any grade with 100 bedrooms, or large scale multi-function conference venues with associated services for groups of 500+. This means that the city cannot offer facilities to the larger travel trade groups, or the large scale business conference market, even though Salisbury may be an attractive option due to its other attractions and location.

All of Salisbury's neighbouring towns and cities, such as Bournemouth, Southampton, Winchester and Bath, do offer such facilities for larger travel trade and business groups (see Appendix VII). Salisbury is not a principal urban area (as determined by the Regional Spatial Strategy) but can be described as a significant settlement – or alternatively an historic city, or large market town.

The consultation tourism strategy for south Wiltshire (Appendix XI) made quite modest proposals for future development of the industry. These mainly regarded improvements to the quality of existing facilities (including accommodation). There were mixed views on the need for more B&B's and hotels.

It could be argued that Salisbury's economic future is dependent on the acceptance that the city is different and cannot, or should not, attempt to compete with some other locations. Salisbury can be an extremely attractive option due to its location, environment and many niche opportunities it offers, and perhaps these parameters should be the focus when considering future development.

South West

South West Tourism regularly monitors tourism businesses in the region (see Appendix IX). During the later part of 2005, 46% of those surveyed had perceived an increase in business activity. Overall, it appears that businesses in the south west feel less optimistic about the short term future of tourism. However, those businesses that are optimistic for the future also experience good levels of advance bookings and it would seem that quality and marketing are key contributors.

The most recently available regional occupancy statistics are for 2004. Room occupancy (for serviced accommodation) peaked at an average of 76% for September, in the south west. For the months of June, July, August and September, the average room occupancy in Wiltshire was below that of the region overall. However, for all other months of the year, Wiltshire shows an occupancy rate higher than the south west average and often higher than other counties such as Devon and Cornwall. Anecdotal evidence suggests that occupancy levels are higher in Salisbury than for Wiltshire as a whole.

UK

In 2003, 15% of all tourism visits made by UK residents were for business purposes (UK Tourism Survey 2003). When choosing to spend money on accommodation, the majority (29%) of people stayed in hotels or guesthouses, with just 7% using B&B's.

In the UK, business tourism is an extremely high value and important sector of the wider tourism industry (see Appendix XIII). It encompasses conferences and meetings, trade fairs, corporate events and business travel. The conference and incentive travel segments are predicted to grow at a faster rate than any other tourism sector up to 2010. It is at the high quality, top end of the tourism industry. It complements the leisure tourism sector in terms of sharing the same infrastructure (as can the local population) and brings visitors to destinations year round, which otherwise may be dependant on seasonal visitors. Business tourism is also considered to stimulate future inward investment, as business people see the attractions of a destination.

4.7 Market opportunities

General business tourism

In the south west of England, 'general business tourism' is ranked as having medium/high growth potential (see Appendix XVI). The average spend per night for a general business trip is estimated at £215. This is much higher than many other domestic visitor spending, such as family holidays and short breaks.

The general business tourism market is reported to be an important market, driven primarily by local economic activity. This market offers high spending with good potential for growth and is counter seasonal to leisure tourism. It is also particularly important in large cities / towns. It is suggested that the main priority should be to ensure that adequate business tourism infrastructure is in place and that business visitors needs are being met. Further market opportunities lie in building relationships with business visitors to encourage return leisure visits.

In terms of strategic priorities for the south west, it is suggested (Appendix XVIII) that general business tourism is a supporting market, rather than a primary or secondary market. This means that it is not considered a main driver of tourism in the region, and that it is not the key to future growth and prosperity. However, the general business market does support the general infrastructure of the industry, and it is suggested that any marketing actions should be at an individual destination or enterprise level.

General business tourism is driven by the overall state of the economy and tends to follow the same economic pattern (Appendix XVIII and XIX). The market wants good and efficient transport links by road, rail and air; good quality and well priced accommodation with 'office' facilities; awareness of business visitor needs; branded hotels; and places to eat and entertain. The potential volume of this market is determined by the nature of the local economy, although the absence of suitable accommodation may constrain the development of business tourism.

Conferences and exhibitions

The conference and exhibition market is very much a small, high value, niche market. There are prospects for growth in the south west (see Appendix XIX) and this is a very valuable and therefore extremely competitive market. The main market opportunities are either in large scale events, such a large conferences and regional exhibitions, or for smaller day meetings taking place in hotels and other venues.

The conference and exhibitions market can be split into sub sectors, each of which have their own distinct characteristics – meetings; incentive travel; conferences; and exhibitions – known as ‘MICE’.

It is suggested that the destinations which are likely to benefit from this market are larger towns with municipal, university or hotel facilities capable of hosting major events. Areas which are readily accessible and close to major population and business centres will tend to do better, however more remote areas can sometimes benefit from hosting team building and management training type events. A sufficient quantity and range of accommodation is necessary.

It is considered that, in the south west, destinations such as Bournemouth, Bristol, Bath, Cheltenham, Torquay and Plymouth are the most important for the conference and exhibition sector. Salisbury is also located in central southern England, as far as the conference market is concerned, and other important destinations are Oxford, Swindon, Southampton and Portsmouth.

Domestic short breaks (1-6 nights)

The short break market is the biggest in the south west, in terms of scale and spending (see Appendix XVII). It is of relevance to all types of destination, particularly in Wiltshire, and has excellent growth potential (Appendix XVIII and XIX). It is a less seasonally dependant market and has high growth potential.

This market has a very broad profile and the main opportunities are considered to be weekend breaks for pre-family groups based in towns/resorts; weekend breaks for families in family friendly hotels and self catering accommodation; and weekend and midweek breaks for the post-family group in good quality hotels.

Although this market offers significant growth potential, it is also competitive, both in the UK and for city breaks abroad.

Domestic group holidays

The south west is an important destination for UK holiday makers travelling in organised groups, primarily by coach (Appendix XVII). These domestic group trips are less seasonal than other holidays, and have a higher level of spend (due to use of local accommodation).

Coach holidays are looking for good quality, large hotels of 3 or 4 star standard. Larger visitor destinations and attractions that are organised to receive coach visitors will benefit. The core age group for this market is 55-69. (See Appendices XVIII and XIX).

The nature of this market is changing from traditional perceptions. These visitors wish to be treated as valued guests and not as ‘second class’. It is projected that there will be future demand for trips to inland destinations, rather than seaside resorts, and a growth in special interest tours. The market is increasingly discerning and will demand good quality serviced accommodation with en-suite rooms.

5.0 Conclusions

This review has explored the provision of hotel and conference facilities in the Salisbury district. It has also examined the tourism industry and market opportunities both at a local level and in the wider context of the south west and UK.

It is acknowledged that there is a lack of reliable and conclusive tourism research, particularly relating to accommodation occupancy and business tourism. This is the case for both Salisbury and other destinations, making comparisons sometimes difficult.

However, we do know that tourism is already an important part of the south Wiltshire economy, accounting for spending of over £146 million and 5500 jobs.

There does appear to be potential for the Salisbury district to take advantage of future growth opportunities in a number of segments of the tourism market.

There has been very little significant development in local accommodation or conference facility infrastructure in the last decade. New developments are proposed at Amesbury which will satisfy some demand. However, the offerings made in Salisbury city are set to remain stagnant. Whilst in the short term this may be acceptable, it does mean that Salisbury is not necessarily keeping pace in an increasingly competitive industry, and will potentially fall behind and see a decline in market share.

With significant new investment however, in the form of targeted destination marketing, plus potential new infrastructure development, the prospects for growth are high.

The Salisbury district has a lot to offer the visitor - a historic city; central location; easy access; international attractions. It is also developing a renowned economy, principally through a world class hi-tech industry.

Salisbury needs to build on these strengths and recognise that it has a unique opportunity to position and exploit itself as a niche, high quality destination for tourism and business visitors.

6.0 Proposals

The following proposals are made:

a. Tourism intelligence

- The lack of reliable and conclusive tourism research needs to be addressed as a priority. Data concerning accommodation occupancy levels is a particular requirement, although businesses are often reticent to share such commercial information. The Salisbury Tourism Partnership should be approached for support on leading this.

- High quality data, obtained regularly and consistently, and where possible comparable with other destinations, is essential to provide evidence for development of the tourism industry – in terms of both marketing strategy and future infrastructure requirements.

- Local level data needs to be regularly analysed and reported on and compared with other destinations, on a regional and UK basis.

- The data should also be used in a more sophisticated way in a more strategic economic context, to help forecast tourism market opportunities and profiles, as is done at a south west region level.

b. Business visitors – targeted destination marketing

- We need to accept that Salisbury is not in a position to compete against destinations offering large scale conference and event facilities, such as Bournemouth or Southampton. Even without a large multi-function venue, Salisbury's own economic base, location, accessibility etc is quite different to destinations which are historically successful in this market.

- Salisbury does however offer an attractive historic city, with a central location and good small / medium sized facilities for the business visitor and should use these strengths to target the niche 'meetings' market. Particular consideration should be given to 'team building' and 'management training' type events, which could be offered across a broad spectrum of local tourism businesses.

- The Salisbury Tourism Partnership should be approached to lead on this, with the development of a business plan, including a detailed and targeted marketing strategy, plus costings, being the priority.

c. Short break visitors – targeted destination marketing

- Salisbury is well placed to target short break visitors who seek good quality hotels or self catering accommodation. This is an extremely competitive market and Salisbury (through the council's tourism service and Salisbury Tourism Partnership) should seek to exploit it's potential through careful and sophisticated targeting of particular segment profiles.

d. Infrastructure development and the Local Development Framework – conference facilities

- Salisbury does not have a comparable urban centre (with a large population and major economic base, fast road/rail/air access etc) to compete on an equal playing field with other destinations in the large scale conference / exhibition market (such as Bournemouth) and it is probably inappropriate to expect it to. Whilst existing local venues, such as the City Hall, may occasionally host this type of event, Salisbury does not offer complementary facilities such as large scale accommodation.

- No proposals are therefore made to make any provision for any future new infrastructure development of this kind in the Salisbury district.

- The new Local Development Framework should, however, make appropriate references to support limited and sustainable development of small scale meeting facilities (of maximum 150 delegates). This does not necessarily suggest new build infrastructure, but an emphasis on supporting the viability of existing businesses.

e. Infrastructure development and the Local Development Framework – accommodation

- Given the analysis of Salisbury's current tourism economy and market opportunities, there may be potential for a 80/100 bedroom hotel in the district. This could cater for the expanding UK group market, providing good quality and value. The new 'Holiday Inn Stonehenge' at Solstice Park has permission to eventually provide 152 bedrooms. It will be important to monitor this development in the context of considering new market opportunities and any appropriate provision in the Local Development Framework.

- To support the market for the discerning business visitor, and the demand for high quality short breaks, it is proposed that provision is made in the Local Development Framework for a 30/40 bedroom high quality 'boutique' style hotel in or near Salisbury city. Further work is required, including discussion with potential developers and a more detailed analysis of the market potential, before any details such as possible sites can be considered.

- It is of course the market which will determine whether any such development is a potentially viable investment opportunity. Whilst the local planning system plays an extremely important and valuable part in providing and monitoring land use, it is the commercial world which will make it happen if it sees fit.

- It is also proposed that existing accommodation providers should be encouraged, as appropriate, to improve guest facilities in general, with the aim of increasing their quality inspection grading.

f. Salisbury District Council owned conference facilities

- There does not appear to be any specific council policy for the operation of the City Hall and Guildhall, in terms of their purpose, target market, operation etc.

- Of more concern is the fact that these venues also rely on a very limited number of customers for the majority of their income. There also appear to be long periods of time when the venues are empty, and so are not generating an income.

- There appears to be great potential to increase the use of both the City Hall and Guildhall, and increase income, if a more focussed and commercial approach is taken.

- The development of any forward business strategy for the City Hall and Guildhall would be dependent on the support of the full council, and is also likely to have financial investment implications.

7.0 Recommendations

It is recommended that:

a. This report and its proposals are received by the working group of the Planning and Economic Development Overview and Scrutiny Panel.

b. The review of hotel and conference facilties in the Salisbury district for the Planning and Economic Development Overview and Scrutiny Panel is now complete.

c. The economic development team take forward this review, as outlined in this report. This will provide evidence for, and be undertaken as part of, wider preparation work on district policies for The Economy part of the Local Development Framework.

d. This report is passed to the consultants working on the Salisbury Vision. The consultants are being asked to review and make recommendations for the preparation of the Area Development Framework for Salisbury and this report could contribute to that process.

List of Appendices

I. Summary of review methodology resources

II. Accommodation Facilities in Salisbury, June 2005 – The Market Research Group (executive summary)

III. Attractions and leisure facilities in Salisbury, August 2005 – The Market Research Group (executive summary)

IV. Visitor accommodation in the Salisbury District, January 2006 – Salisbury District Council (summary of findings)

V. Provision of conference facilities in the Salisbury District, January 2006 – Salisbury District Council (summary of findings)

VI. Face-to-face interviews with hotel and conference providers in the Salisbury district, Oct/Nov 2005 – notes of discussions

VII. Hotel and conference facilities in Salisbury and other areas

VIII. Notes from meetings of Planning and Economic Development Overview and Scrutiny Panel (working group) with representatives from the Salisbury Tourism Partnership, 14 June 2005 and 15 September 2005

IX. UK Group Travel Operators research, January 2006 – Salisbury District Council (summary of findings)

X. Salisbury Destination Benchmarking Visitor Survey 2004, Tourism South East and Salisbury Economic Impact of Tourism 2003, South West Tourism (summary of key points)

XI. A Tourism Strategy for South Wiltshire, Consultation 2005, Salisbury District Council (extract from summary of responses to consultation questionnaire)

XII. Salisbury District Local Plan, Adopted June 2005 (extract from Tourism policy)

XIII. Hotel and conference facilities in Salisbury and other areas

XIV. Business Tourism Briefing: An overview of the UK's business tourism industry, January 2003, Business Tourism Partnership (extract)

XV. South West Tourism Business Barometer, July to September (3rd Quarter) 2005, South West Tourism (extract)

XVI. South West Tourism Occupancy Survey, 2004 Serviced Accommodation Results, South West Tourism (extract)

XVII. State of Tourism South West – Intelligence Report, July 2003 – produced by The Tourism Company for South West Tourism and the South West Regional Development Agency (extract from Market Opportunities and Profiles – A Market Overview)

XVIII. State of Tourism South West – Intelligence Report, July 2003 – produced by The Tourism Company for South West Tourism and the South West Regional Development Agency (extract from Market Opportunities and Profiles – Strategic Priorities)

XIX. State of Tourism South West – Intelligence Report, July 2003 – produced by The Tourism Company for South West Tourism and the South West Regional Development Agency (extract from Segment Profiles)

Appendix I

Summary of review methodology sources

The following is a summary of all research undertaken or evaluated for this review.

Primary research	**See Appendix**
‘Accommodation facilities in Salisbury’, June 2005 – undertaken on behalf of Salisbury District Council by The Market Research Group (a commercial group within Bournemouth University)	II
Attractions and leisure facilities in Salisbury’, August 2005 - undertaken on behalf of Salisbury District Council by The Market Research Group (a commercial group within Bournemouth University)	III
‘Visitor accommodation questionnaire – produced and distributed to 66 local accommodation providers by Salisbury District Council	IV
Provision of local conference facilities – produced and distributed to 46 local conference facility providers by Salisbury District Council	V
Group travel questionnaire – produced and distributed to 2500 UK group travel operators by Salisbury District Council	IX

Secondary research	**See Appendix**
Salisbury Destination Benchmarking Visitor Survey 2004, undertaken on behalf of Salisbury District Council by Tourism South East	X
Salisbury Economic Impact of Tourism 2003, undertaken on behalf of Salisbury District Council by South West Tourism	X
‘A tourism strategy for south Wiltshire - Consultation’, 2005 – Salisbury District Council	XI
Salisbury District Local Plan, Adopted June 2005	XII
Business Tourism Briefing: An overview of the UK’s business tourism industry, January 2003 - produced by Business Tourism Partnership	XIV
Proposal for the Development of a Tourism Strategy for Wiltshire & Swindon 2005 – 2010 & for the Establishment of a Destination Management Structure, September 2005, produced by the International Centre for Tourism & Hospitality Research, Bournemouth University for the Wiltshire and Swindon Economic Partnership	n/a

South West Tourism Business Barometer, July to September (3rd Quarter) 2005, South West Tourism	XV
South West Tourism Occupancy Survey, 2004 Serviced Accommodation Results, South West Tourism	XVI
State of Tourism South West – Intelligence Report, July 2003 – produced by The Tourism Company for South West Tourism and the South West Regional Development Agency	XVII

Consultation	**See Appendix**
Face-to-face interviews with Chairman and Vice-Chairman of Salisbury Partnership – meetings led by Councillor Peach and Councillor Mrs Margaret Peach, held 20 July 2005 and 15 September 2005	VIII
Face-to-face interviews with seven of the largest local accommodation and conference facility providers (White Hart Hotel, Red Lion Hotel, Milford Hall Hotel, Guildhall, City Hall, Wilton House and Sarum College) – meetings led by the councils Economic Development Manager during October/November 2005	VI
Informal consultation and updates provided (by officers of the council's Marketing , Economic Development and Tourism service) to meetings of the Salisbury Tourism Partnership (Control Group), South Wiltshire Economic Partnership, and the council's 'Five Economic Partners'	n/a

.

Appendix II

Accommodation Facilities in Salisbury, June 2005 – The Market Research Group on behalf of Salisbury District Council (Executive summary)

1.1: Key conclusions

- There may be perceived gaps and deficiencies in the visitor accommodation sector.
- There is a demand for better provision of business and conference facilities.
- It is important that any development is sensitive to the character of Salisbury.
- 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 bed spaces 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.

Appendix III

Attractions and leisure facilities in Salisbury, August 2005 – The Market Research Group (executive summary)

1.1: Key conclusions

1) There is some demand for a major leisure development amongst residents, but not necessarily visitors.

2) There is fairly robust demand for development of Salisbury's general leisure infrastructure, amongst residents and visitors alike.

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

1.2: Attractions and Leisure Facility Supply

41 significant visitor attractions and leisure facilities were identified within Salisbury and the surrounding area. 29% of leisure facilities and attractions are within Salisbury itself. A further 32% are within 10 miles of the city, 12% within 15 miles, 10% within 20 miles and 17% are more than 20 miles from the city.

There are four major visitor attractions, attracting more than 500,000 visitors per annum, within the Salisbury locale. This represents 10% of the total stock of leisure facilities and attractions. At the other end of the scale, the majority of facilities (74%) attract fewer than 100,000 visitors per annum.

The stock of attractions and leisure facilities in Salisbury is dominated by historic properties (24%), leisure / theme parks (22%) and museums / art galleries (17%). Gardens represent 12% of attractions stock, and farms represent 7%. The remaining 17% of attractions are of various other types.

The majority of attractions charge less than £3 (24%) or between £3 and £4.99 (37%) for a standard adult admission. A further 20% of attractions charged between £5 and £10 for a standard adult admission, and 5% charge more than £10. 15% of attractions are free entry.

1.3: Resident Survey

Cafes and restaurants were the leisure facilities most frequently used by residents (average frequency of 2.3, around "every few weeks"). This was followed by pubs / bars (average 2.8, around "every month or so").

Andover was the most frequently visited alternative for Salisbury residents using leisure facilities ("every few months" on average), followed by Southampton and Bournemouth. Residents visited Winchester, Poole and Basingstoke to use leisure facilities less frequently.

Whilst residents overwhelmingly agree that it is important that any development does not detract from Salisbury’s ‘unspoilt’ appeal (93%), they also agree that the area needs more leisure facilities (66%).

In general, younger residents of Salisbury were more likely to support developments of various types and older residents were the least enthusiastic. A bowling alley (50%), a multiplex cinema (47%), more theatres / live arts venues (47%) and a greater range of restaurants (45%) were the most popular prospective developments.

1.4: Visitor Survey

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.

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.

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.

The majority of visitors had used cafes or restaurants (91%), museums or galleries (78%) and pubs / bars (68%). Relatively few visitors had used sporting facilities (11%), the cinema (7%), swimming pool (5%) or the theatre (4%).

Winchester was the most visited alternative destination amongst visitors (68%). 28% had visited Bournemouth and Southampton, 8% had visited Poole, 6% had visited Andover and 2% had visited Basingstoke.

Visitors unanimously agreed that it was important for any development in Salisbury not to detract from it's "unspoilt" appeal, and most visitors agreed that underdevelopment was part of Salisbury's charm.

74% of visitors would like a greater range of restaurants and other places to eat, and 60% of visitors would like to see more museums or galleries. The three major leisure developments proposed - a multiplex cinema, a sports / leisure centre and a bowling alley were popular with 33%, 30% and 29% of visitors respectively.

Appendix IV

Visitor accommodation in the Salisbury district, January 2006 – Salisbury District Council

Summary of findings

Methodology

- Research carried out by the Economic Development team at Salisbury District Council.
- Questionnaires sent out to 61 accommodation providers in South Wiltshire and close proximity.
- Three mailings carried out over a period of 8 weeks from January 2006.
- Response rate of 61% (37 from 61)

Annual Turnover

- Businesses were asked to state their annual turnover.
- Ten of the respondents preferred not to provide a figure.
- Of those who did provide a figure, turnover ranged from £15,000 to £2.3m.
- The average annual turnover was £588,666.67.
- Please note that the turnover figures provided may include revenue for business other than accommodation and outside of their South Wiltshire location.

Type of Accommodation

Hostel	Hotel	B&B	Holiday Park	Self Catering	Inn	Other
0%	38%	27%	3%	3%	22%	8%

How is your business owned?

Private Limited	Sole Trader	Partnership	Plc
58%	17%	25%	0%

How long has your business been established in Salisbury

0-4 years	5-10 years	11-20 years	21 years +
23%	13%	27%	37%

Estimated number of guests per year

0-1000	1001-2000	2001-4000	4001-6000	6001-8000	8000+
36%	11%	18%	4%	7%	25%

Do you provide any of the following?

Internet for guests' use	49%
Restaurant	70%
Licensed bar	76%
Gym/sauna/swimming pool	11%
Garden for guests' use	70%
On site car park for guests	89%
Passenger lift	5%
Meeting rooms for less than 20 people	62%
Meeting rooms for more than 20 people	49%

Who are your main customers?

	Business	Tourist (Domestic)	Tourist (Foreign)
Short term (1-3 nights)	78%	73%	68%
Long term (3+ nights)	32%	30%	35%

For non-business guests, what age group do you mainly target?

15-19 yrs	20-25 yrs	26-35 yrs	36-49 yrs	40-64 yrs	65+ yrs
3%	8%	24%	70%	62%	27%

Have you carried out any infrastructure development in last 5 years?

Yes	No
46%	54%

Do you plan to carry out any infrastructure development in next 5 years?

Yes	No
57%	43%

Have you carried out interior refurbishment in the last 5 years?

Yes	No
92%	8%

Do you plan to carry out interior refurbishment in the next 5 years?

Yes	No
92%	8%

Appendix V

Provision of conference facilities in the Salisbury district, January 2006 – Salisbury District Council

Summary of findings

Methodology

- Research carried out by the Economic Development team at Salisbury District Council.
- Questionnaires sent out to 47 conference venues in South Wiltshire and close proximity.
- Three mailings carried out over a period of 8 weeks from January 2006.
- Response rate of 64% (30 from 47)

Number of Employees

- Businesses were asked for the number of full-time equivalent employees and the projected numbers of employees they may have in 5 years time.
- 50% of businesses expect to increase their number of employees, with 40% expecting to remain the same and 10% unsure.
- Overall the conference market expects a 2.5% rise in jobs over the next 5 years.

Annual Turnover

- Businesses were asked to state their annual turnover.
- Six of the respondents preferred not to provide a figure.
- Of those who did provide a figure, turnover ranged from £10,000 to £3.6m.
- The average annual turnover was £929,341.08.

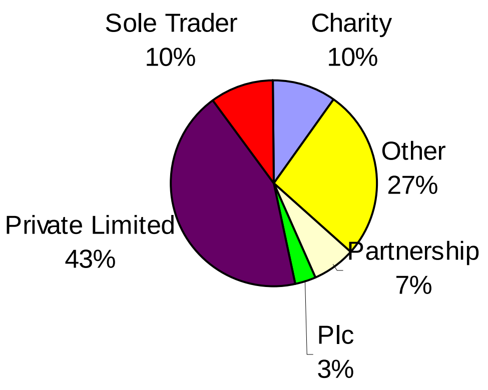
How is your business owned?

- Businesses were asked to indicate whether they were Private Limited, Sole Trader, Partnership or Plc.
- A number of businesses did not fit those parameters and so provided additional answers.
- Results are shown below in Table 1 and Figure 1.
- Businesses classed as other include district council owned venues and educational centres.

Table 1 – Business Ownership

Private Ltd	Sole Trader	Partnership	Plc	Charity	Other
13	3	3	1	3	8

Figure 1 - Business Ownership



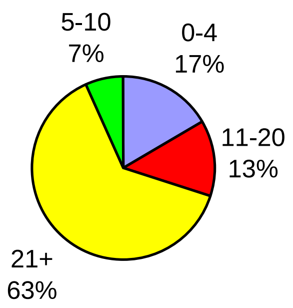
How long has you business been established?

- Businesses were asked how long they have been established and given options of 0-4 years, 5-10, 11-20 and 21+.
- Results are shown below in Table 2 and Figure 2.

Table 2 – How long has your business been established?

0-4 years	5-10 years	11-20 years	21+ years
5	4	19	2

Figure 2 - How many years has your business been established?



Are you a residential or non-residential venue?

- 57% of the conference venues provide accommodation facilities, while 43% are non-residential.

Number of Conference Rooms

- The number of conference rooms at the venues ranged from 1 to 20.
- The average number of conference rooms per venue was 4.

Maximum number of delegates seated theatre style

- The capacity of delegates seated theatre style ranged from 20 to 953.
- The four largest venues are City Hall (953), Odeon Salisbury (471), The Guildhall (200) and The Bibury Club (200).
- The average capacity of delegates seated theatre style was 160.

Number of bedspaces

- Businesses were asked the number of total bedspaces available on site.
- For the 13 venues that responded to this question, the number of bedspaces ranged from 10 to 192.
- The three businesses with the most bedspaces are Travelodge (192), The Red Lion Hotel (95) and The White Hart Hotel (92).
- The average number of bedspaces for residential venues is 65.

Total number of bedrooms

- For the 14 businesses that responded to this question, the number of bedrooms range from 8 to 90.
- The three largest residential venues are Salisbury College (90), The White Hart Hotel (68) and Tidworth College and Conference Centre (58).

- The average number of bedrooms for residential venues is 36.
- The total number of bedrooms for residential conference venues is 498.

What percentage of your customers are corporate or social?

- Overall mix of 51.825% corporate to 48.175% social.

Do you provide in-house catering

Yes	No
77%	23%

Do you have kitchen facilities for external caterers?

Yes	No
33%	67%

Have you carried out any infrastructure development in last 5 years?

Yes	No
33%	67%

Do you plan to carry out any infrastructure development in next 5 years?

Yes	No
53%	47%

Have you carried out interior refurbishment in the last 5 years?

Yes	No
90%	10%

Do you plan to carry out interior refurbishment in the next 5 years?

Yes	No
83%	17%

Appendix VI

Face-to-face interviews with hotel and conference providers in the Salisbury District, October / November 2005

Notes of discussions (not attributed to protect commercial confidentiality)

Meetings were held with senior owner/managers of the following businesses in Salisbury: Guildhall; City Hall; White Hart Hotel; Red Lion Hotel; Milford Hall Hotel; Sarum College; Wilton Estate

Subject: business investment

- all providers were currently reviewing (formally or informally) their business and the cost/benefit of either potential infrastructure expansion, or undertaking focussed and strategic marketing for growth

- most businesses undertake a rolling programme of interior refurbishment

- physical limitations of space were the main reason for not undertaking substantial infrastructure development, even though this could benefit the business

Subject: current levels of business activity

- response was mixed, and a trend was not apparent – each business operates very individually (in terms of culture of the organisation, as much as services offered) and has different aspirations
    - one business had seen stagnant accommodation turnover, so had been very pro-active and focussed on this service and achieved good growth since – at the same time they made a conscious decision to reduce activity on conferences which has led this to be a very low % of turnover and mostly pure profit
    - conversely, another business had seen a change from having more approx 2:1 commercial:leisure users a few years ago, to having almost half leisure users today
    - and conversely again, another business had seen private customers make up 20% of sales a few years ago (80% corporate), but this year grown to about 60%, mainly from weddings and social functions

Subject: target markets

- most businesses had found their own ‘niche’ markets by supplying services to specific customers, including some large corporate clients (in one case one corporate client alone brought in 60% of business)

- it was felt by many that people visit Salisbury for a ‘reason’ – be that for a wedding, to see family or on business – rather than to spend a week based here simply ‘on holiday’

Subject: competition

- on the subject of potential new competition (and specifically the proposed hotel at Solstice Park, Amesbury), reaction was very mixed – this at least should be noted and recognised that there is not a consensus on the subject
    - businesses who were confident in their own service (both accommodation and conferences) said they would ‘monitor, but were not worried’ about the possible impact
    - others said that there was not enough trade to warrant another ‘large’ hotel in the city itself and were concerned about competition
    - it was also noted however, that there are specific time of year when the city could benefit from more bedspaces, and that this could support the conference market all year round

Subject: constraints and threats to business

- low levels of private car parking space (and the need to provide this for disabled customers) put a further constraint on the potential to develop infrastructure

- 51 bedrooms is apparently a banding threshold for hotel insurance purposes, so any proposals for development over this number has cost implications

- historic buildings and sites hemmed in by roads / other properties do not easily lend themselves to infrastructure development, without significant cost implications – although the historic nature of the properties is likely to be one of the business best assets, the strict planning policies which naturally protect this were not always appreciated

- there were a number of comments regarding the relatively small profits from conference provision, compared to the wear and tear on property (particularly historical ones) – and that this led some businesses to concentrate on fewer, more specialist events with sponsorship opportunities

- staff accommodation is becoming increasingly limited (for hotel staff), particularly as property that was once used for this purpose is being brought into more profitable use as part of the business itself

- it is of some concern that most businesses relied on one or very few key customers to bring in the majority of income for their conference facilities

Subject: opportunities for business

- to be a ‘four star’, or simply larger, hotel was an aspiration for more than one business, however this requires a lift access to all areas, night managers etc – some of which would be difficult and costly given historic buildings

- despite the concerns over competition from any future proposed new hotel, several businesses showed an interest and saw the potential to actually develop / invest in such a development themselves – it appears that they see the potential for a new hotel with a niche market (eg the boutique style, or a large hotel with conference facilities) that would perhaps not be in direct competition with their existing offering – or that they see such a development as less constrained and offering more potential than their current property

- recruiting staff does not appear to be a problem, and they are trained as necessary – some businesses cited IIP and the Business Link 'Skills for Business' initiative as being very helpful

- some conference venues were very keen, and see a clear market, for high quality (4/5 star) accommodation to complement the high quality events they host (including weddings and social functions) – it was suggested that this needs to be either one larger provider of 40 rooms (80 bedspaces) or a number of smaller boutique style hotels

- it appears that many businesses struggle to reconcile the aims / objectives of their conference facilities, and that in many cases there is no clear strategic business plan for this – in many cases the businesses appeared to be 'lucky' to have secured repeat custom from clients (albeit good sales) rather than have a specific target – this is of course not an issue, but may not be making most of potential opportunities

- it appears that SDC planners have been proactive in suggesting alternative and more acceptable infrastructure developments (mainly for historic buildings), on several occasions, but that there is some reluctance (understandably due to higher costs) from the businesses to take this forward

- provision of leisure facilities, alongside accommodation, was a key aim of more than one business – to support the weekend break market, as well as being able to offer this to business visitors

- there was some support for a coordinated conference booking facility for Salisbury (being discussed via Salisbury Tourism Partnership) and the potential to sell the city as a conference destination

Subject: constraints and threats to Salisbury as a destination

- parking and charges in the city (for their businesses, particularly as most have minimum private spaces) were an issue – however park and ride was praised

Subject: opportunities for Salisbury as a destination

- development of the Market Square and the café culture

- a broader retail offering (a department store was mentioned)

Appendix VII

Hotel and conference facilities in Salisbury and other areas

	4 star hotel or 100+bedroom hotel (no.)	Large scale conference facilities (500+ capacity)
Salisbury	0	No
Bournemouth	8	Yes
Poole	No, but adjacent to B'mouth	Yes
Winchester	3	Yes
Southampton	1	Yes
Basingstoke	5	No
Swindon	8	Yes
Bath	5	Yes
Bristol	12	Yes
Portsmouth	3	No
Reading	4	Yes

Appendix VIII

Notes from meetings of Planning and Economic Development Overview and Scrutiny Panel (working group) with representatives from the Salisbury Tourism Partnership, 14 June 2005 and 15 September 2005

Notes from Meeting with Mary Webb and Peter Watt 14th June 2005

There is a need to identify existing facilities to ascertain where gaps exist and what can be provided with existing facilities.

The members noted that they were supportive of the proposed action plan circulated by the Economic Development Manager.

It was noted that the consultant's report includes some figures which appear contradictory. For example there are statistics showing that visitors would like more accommodation to be provided but later in the report the consultant states that number of additional bed spaces is greater than the demand for them. This explains the conclusion that there *may* be a market for a greater range of facilities but that this will need further investigation.

The members felt that if the Park and Ride sites could ease congestion in the City Centre then this might attract more business visitors.

Mary and Peter made the following points:

- that providing conference facilities outside existing hotels would not be helpful to expanding the hotel market.
- Many of the hoteliers in Salisbury wish to expand but planning policy is restricting their ability to do so.
- There is a feeling that existing businesses are being excluded from the process.
- Effort should be focused on expanding what we have and maximising existing resources. It is felt that there is still capacity in the existing facilities.
- Local hoteliers and businesses are working together to create a package for business visitors which includes not only hotel accommodation but also evening entertainment.
- Conference Wiltshire does not promote Salisbury.
- The market square should be developed for evening entertainment.
- Planning officers should be involved in the review at an early stage.
- In the action plan circulated at the meeting, points 1,3,4 and 5 should be undertaken before point 2.

Notes from Meeting with Mary Webb and Peter Watt 15th September 2005

Mary Webb and Peter Watt raised a number of issues in reference to Bournemouth University's Market Research Paper. These are listed with page references below.

- Page 4: ' There is a need for better provision of business and conference facilities'. Which businesses and where does this refer to? (Clarification from Consultants). Councillor Mrs Chettleburgh noted that facilities for businesses and conference facilities are needed, along with the possibility of a hotel as noted by both SWEP and CCM. Mary Webb noted that the City Hall could be a suitable conference venue however at present it is not promoted for this purpose.

- Page 4: The research paper states that the average visitor to Salisbury spends around £19 per person per night. Mary Webb and Peter Watt explained that these figures appear to be inappropriately low to be a true reflection of Salisbury accommodation. The possibility that this figure took into account visitors who may stay in hostel accommodation/ with host families was discussed (clarification from consultant).
- Page 4: 'Salisbury's accommodation capacity is set to be augmented by a new hotel at Solstice Park, providing some 88 rooms'. MW and PW argued that the Solstice Park development would detrimentally affect Salisbury city centre hotels. MW and PW also noted that the planned conference facilities at Solstice Park are only set to accommodate 80 people. They saw this as an inappropriately low figure considering Salisbury's need for conferencing facilities, and consequently argued that the Solstice Park development may be viewed as a missed opportunity. Cllr Peach and Cllr Mrs Chettleburgh pointed out that the Solstice Park development is set to proceed in stages, resulting in a lesser initial impact on Salisbury city centre, however they also noted that concerns over the impact of Solstice Park upon the city may be unfounded. The target audience of Solstice Park are those visitors who pass through on the A303, *not* those who would otherwise patronise the city. There are also plans for an extra 1100 houses to be built in Amesbury and Solstice Park would provide jobs for those people. Councillor Chettleburgh also noted that Maltings should be redeveloped and conferencing facilities could be located there. Councillor's stated the overall opinion that Amesbury, Stonehenge and Salisbury city centre should be developed in order to support each other, but that it was essential for Salisbury city centre to develop its own vision for the next 20 years in order to remain vibrant.
- Page 4: 'Whilst there is sufficient mid range accommodation in Salisbury, there is evidence to suggest a lack of supply in the budget and high quality market relative to demand.' PW noted that he disagreed to some degree with this statement. He argued that it is difficult to fill rooms at the weekend at the rate of £70 per person per night, and suggested that a 5 star hotel would therefore also struggle to make £250-300 per night. PW and MW noted that the definition of budget accommodation is subjective. If it refers to 2 star hotels and downwards, PW questioned whether this was the type of establishment that Salisbury city centre would benefit from. Would this promote the appropriate image for the area?
- Page 5: '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.' MW expressed the view that Salisbury already has good quality restaurants however they are not being promoted effectively. This led onto a discussion within the group that the existing facilities within the city should be developed and promoted and new facilities should be created at a later stage as demand for them grows. The group referenced venues such as the Arts Centre and the Medieval Hall as possibilities for conferencing, however Cllr Peach noted that there is a distinct difference between boardroom and theatre style conferencing, and the city needs venues that can accommodate both styles. It was established by hoteliers that the city's hotels could easily accommodate fringe conferences of 20-30 people, and Cllr Peach asked for information regarding this to be collated for the final report (such information to be gathered by both hoteliers and officers). He also raised the issue of large-scale conferencing- could Salisbury City Centre host a National Party Conference? MW and PW believed the city could and that a conference could be held at the City Hall.
- MW and PW noted that communication between hoteliers is important and whilst there is strong communication and co-operation between most hotels as they are all individually owned a conference facilitator would be a good idea. MW noted that the Tourism Partnership has plans to interview an individual on October 4th, who may be able to provide such a service. MW noted that she has agreed to produce a conference brochure for the Tourism Partnership meeting. (Mary and Peter to feed back to the review group).
- Page 8: 'A total of 288 interviews were conducted. This included 199 interviews with local residents and 89 interviews with visitors staying in Salisbury.' MW and PW noted that the

numbers interviewed were disproportionate to the needs of the review and more focus should be placed upon the opinion of visitors to the area than those of residents.

- Page 9: '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.' It was noted by MW and PW that the city's hotels are significantly lacking in these facilities, and the Members were in agreement with this. It was agreed by the group that such a lack in facilities renders Salisbury less attractive to families, and there is a need to rectify this, as at present all leisure facilities within the area require transport in order to reach them. PW noted that planning permission for a swimming pool at The White Hart hotel has been turned down and MW argued that planners should help existing businesses to develop further before putting forward new instruction for extra facilities. (Planning Officers to be interviewed)
- Page 21: ' Number of Business Visitors to Salisbury and Comparable Destinations- Bournemouth and Weymouth'. PW and MW noted that Bournemouth and Weymouth are both unsuitable comparisons for this study, as they are both seaside destinations and Salisbury is not, and Bournemouth is already a well established conferencing destination for businesses. The Members were in agreement with this, and it was thought that towns such as Winchester, Chichester and Bath would have made better comparisons. (Clarification from consultant as to why these comparisons were chosen).
- Page 23: 'There was also some concern [among market research interviewees] about the availability of catering facilities for delegates who wished to dine in the town itself.' Again, PW and MW noted their belief that the issue lies in a lack of advertising of catering facilities and not in a lack of facilities themselves. MW informed the group of Salisbury Tourism Partnership's plans to produce an information sheet advertising the city's food outlets, as well as their plans to invest in an online upgrade of the 'Visit Salisbury' site, which will provide accommodation and restaurant information.
- Page 27: Table 14 notes Salisbury as having 30 hotels, separate form inns and guesthouses etc. PW and MW view this as an unrealistic figure for Salisbury and asked if the boundaries had been blurred between the accommodation types. The group agreed that clarification is needed of this (hoteliers and officers to action).
- Page's 35 and 39: Again, it was felt that the comparisons offered to Salisbury for the purpose of market research were inappropriate, and the paper would have been better to compare to historic cities such as Winchester, Chichester and Bath. It was also noted that many of the comparable areas had universities, which would generate extra business for the area, making it an inappropriate comparison to Salisbury.
- Page 42: PW and MW felt that 'Table 30: Supply/ Demand for accommodation (%)' needs reassessment with Bournemouth University due to the appearance of inaccurate findings. (clarification from consultant)
- Page 44: 'There is a lack of single rooms at the budget end of the market'. PW and MW stated that their experience in the industry led them to believe a contradictory view to this, as they found difficulty filling their single rooms. They asked for clarification of which sector of the market this applies to. Could it be referring to families visiting with children who need their own single room?
- Page 46: 'Respondents tended to feel that provision at a Bed and Breakfast level in particular was sufficient to accommodate visitors to the city.' PW and MW noted in response to this that parking provisions are insufficient to manage visitors to the city, and that many B&B's are experiencing increased overheads due to street parking charges for their customers. This will in turn increase charges to the visitors we are trying to attract to the area.

Summary and Future Actions

- Existing facilities should be considered for the fulfilment of conference/ leisure needs ahead of new developments. The City Hall, along with buildings such as Alexander House (once vacated) should be considered and officers should investigate this as part of the future action plan. The Economic Development Manager noted that she was investigating all such facilities.

- PW and MW (via STP) will supply a current list of Salisbury accommodation, detailing conferencing facilities and capacities.
- Transport links should be carefully considered alongside development plans in order to maximise uses of the railway and Park and Ride etc.
- Issues that have arisen point to a larger picture than simply a lack of hotels and conferencing facilities. Future plans and the attraction of new business to the area should be considered within the report.
- SWEP and CCM to be considered for future interviews.

Appendix IX

UK Group travel operators research, January 2006 – Salisbury District Council

Summary of findings

Methodology

- Research carried out by the Economic Development team at Salisbury District Council.
- Questionnaires sent out to approximately 2000 UK group travel organisers in one mailing in January 2006.
- Received 97 completed questionnaires back (4.85%)

What customer ages group do you mainly target?

15-19	20-25	26-35	36-50	51-64	65+
10%	5%	10%	28%	62%	64%

What business sector do you mainly target?

Tourist/leisure	Corporate business	Both	Other
81%	0%	13%	7%

Do you currently visit Salisbury?

Yes	No
68%	32%

Which are the main attractions you visit?

Attraction	% of the Operators that come to Salisbury who visit the attraction
Salisbury Cathedral	91%
Beaulieu	65%
Stonehenge	64%
Longleat	61%
Salisbury Markets	56%
Wilton Shopping Village	55%
Wilton House	50%
Bucklers Hard	35%
Wilton Carpet Factory	33%
Stourhead	32%
Salisbury Racecourse	17%
Breamore House and Museum	15%
Museum of Army Flying	12%
Farmer Giles Homestead	11%
Old Sarum Castle	9%
Mompesson House	7.5%
Salisbury and South Wiltshire Museum	7.5%
Larmer Tree Gardens	6%
Heale Garden and Plant Centre	6%
The Medieval Hall	4.5%
Rockbourne Roman Villa	3%
Fisherton Mill	3%
The Wardrobe Military Museum	3%
Old Wardour Castle	3%
Dorset Heavy Horse Centre and Farm	1.5%

Cholderton Rare Breeds Farm	1.5%
Bush Farm Bison Centre	1.5%

How do you mainly travel to Salisbury?

Coach/bus	Train	Other
100%	0%	0%

Opinion of Salisbury (from operators currently visiting)

	Very Poor	Poor	Average	Good	Very Good	Don't Know
Visitor attractions and other places to visit						
-range	2%	0%	9%	64%	16%	2%
-quality of service	0%	4%	20%	65%	9%	2%
-value for money	0%	4%	22%	67%	9%	2%
Places to eat and drink	2%	0%	23%	57%	15%	3%
Shops	0%	2%	22%	57%	16%	3%
Ease of finding way around	2%	0%	39%	39%	14%	5%
How would you rate the overall availability of accommodation in Salisbury?	0%	0%	22%	15%	4%	60%
How would you rate the availability of accommodation you require? (for instance on the days and dates you require)	2%	2%	20%	7%	2%	67%
How would you rate the range of accommodation in Salisbury?	0%	0%	20%	13%	2%	65%
What do you think of the standard of other facilities and attractions in Salisbury?	0%	2%	29%	48%	14%	7%
How would you rate Salisbury as a travel destination compared to other cities?	2%	2%	24%	45%	24%	3%

If you do not currently organise trips to Salisbury, could you please indicate the main factor why not?

Lack of activities / places to visit	Lack of sufficient overnight accommodation	Accessibility	Prefer other destinations	Other reasons
3%	6%	13%	16%	61%

How could Salisbury be better for you?

More/larger accommodation	More leisure facilites	More attractions/ places to visit	Other
20%	2%	16%	62%

To what extent would a 100 bedroom high quality hotel improve Salisbury's appeal as a group travel destination?

Not at all	**Reasonably, but still other significant factors**	**A fundamental improvement**
35%	39%	26%

Have you ever received any of our publications?

Yes	**No**
56%	44%

Which publications have you seen?

Visitor Guide	**Mini Guide**	**Travel Trade Supplement**	**Coach Drivers Leaflet**
37%	10%	22%	35%

Would you like to receive our publications in the future?

Yes	**No**
80%	20%

Appendix X

Salisbury Destination Benchmarking Visitor Survey 2004, Tourism South East (for Salisbury District Council) and Salisbury Economic Impact of Tourism 2003, South West Tourism (for Salisbury District Council)

Summary of key points

Salisbury District Council commissioned a survey of visitors which was undertaken by the Research Unit of Tourism South East between June and September 2004. Similar surveys had been carried out in 2000, 2001 and 2002. The aims of the 2004 research were to: provide up to date information on the origin, profile and behaviour of visitors to Salisbury and the characteristics of their visits in order to identify emerging trends; explore views on the strengths and weaknesses of Salisbury as a visitor destination and evaluate opinions on specific aspects of the visitor experience.

Of those approached to participate in the survey 599 were target profile 'visitors' who both agreed to take part and were eligible to complete the questionnaire.

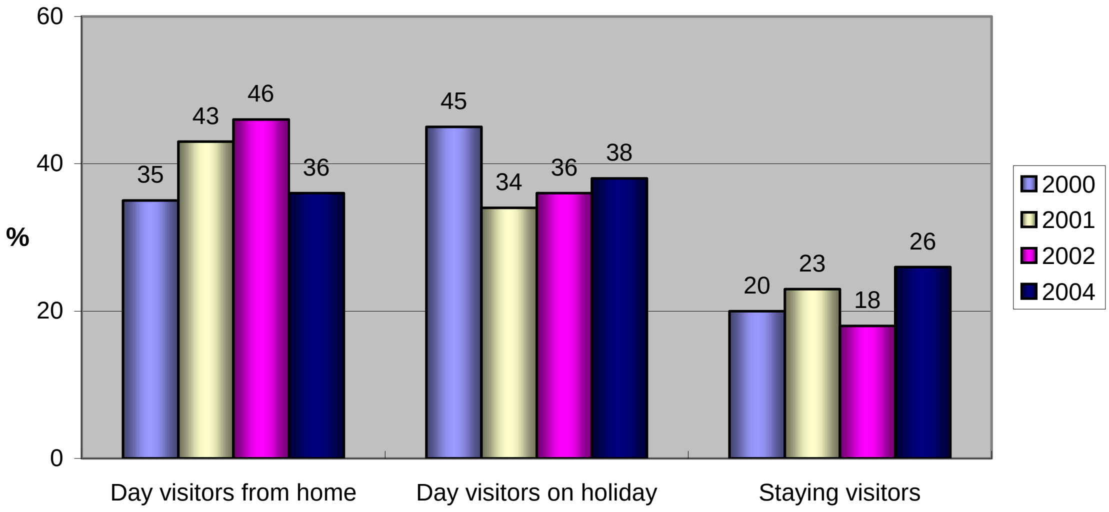
The following information is taken from the survey to give a summary overview of the profile and origin of visitors, characteristics of visits, visitor expenditure and opinion.

1. Visitor profile

Day visitors accounted for 74% of all visitors, with a fairly even divide between day visitors from home (36%) and day visitors from holiday bases outside Salisbury (38%). The remaining 26% were staying overnight in commercial or non-commercial accommodation within Salisbury.

Overall, a higher proportion of visitors interviewed were staying overnight in the city in 2004 compared with previous survey years, see Figure 1.

Figure 1. Trends in visitor type 2000-2004

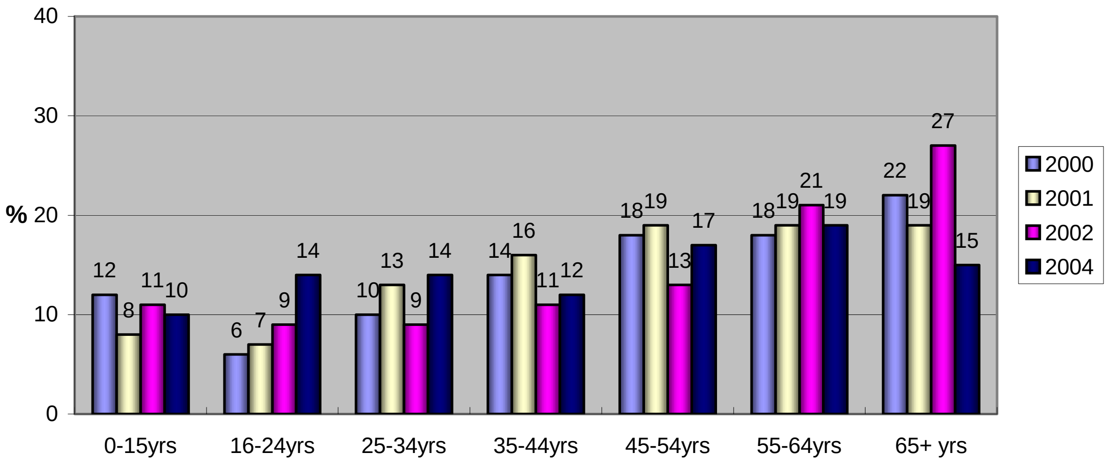


The average size of all visitor groups surveyed was 2.15 people.

88% of all visitor groups surveyed consisted of adults only, while 12% of all groups included one or more children. The single largest visitor group composition was 2 adults (51%).

Overall, visitors were fairly evenly distributed between the age categories, but with the highest proportion of visitors falling into the 45-54 and 55-64 age categories, (Figure 2). 74% of visitors fell into the more affluent ‘ABC1’ socio-economic group.

Figure 2. Trends in visitor age profiles 2000-2004



2. Origin of visitors

Around two thirds of all visitors were domestic visitors, and a third were visitors from overseas.

The highest proportion of day visitors from home were from homes in Hampshire (28%) while a further 22% were residents of towns or villages elsewhere in Wiltshire. Smaller proportions of day visitors were from Dorset, Somerset and the Greater London area.

Domestic day visitors on holiday and staying visitors were from a wide range of locations throughout the UK.

The five main overseas countries of origin were: the USA, Germany, Australia, Italy and France.

Table 1 shows the type of accommodation used by staying visitors. Overall, the profile of accommodation used by visitors staying overnight in Salisbury remained relatively unchanged from 2002, except that visitors were showing an increased propensity to stay in smaller serviced accommodation establishments (B&Bs or guest houses) rather than in larger hotels.

Table 1. Type of accommodation used – staying visitors

	Salisbury 2002	Salisbury 2004
Hotel	26%	23 (15%)
B&B/guest house	18%	45 (29%)
Pub/ inn	2%	6 (4%)
Home of friends/relatives	24%	33 (21%)
Rented s/c cottage/flat/house	3%	3 (2%)
Touring caravan	9%	3 (2%)
Camping	4%	16 (10%)
Own static caravan	2%	-
Language school	2%	1 (1%)
Youth hostel	7%	15 (10%)
University accommodation	0%	1 (1%)
Other	4%	11 (7%)
Total	100%	157 (100%)

3. Characteristics of visit

The largest proportion of visitors described their visit to Salisbury as a holiday or leisure based visit (74%). 10% of all visitors were visiting friends of relatives, 9% were visiting for a 'special' shopping trip, 5% on business and the remaining 2% were language students. Table 2 compares the purpose of visits between 2000 and 2004.

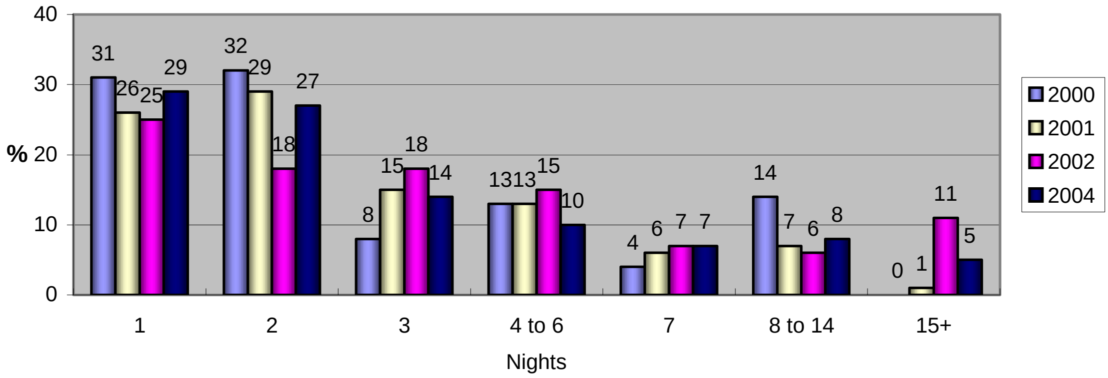
Table 2. Purpose of visit – visitors to Salisbury in 2004 compared with previous years

	Salisbury 2000	Salisbury 2001	Salisbury 2002	Salisbury 2004
	All visitors	All visitors	All visitors	All visitors
Leisure/holiday	74%	72%	79%	74%
VFR	11%	11%	7%	10%
Special shopping trip	11%	15%	11%	9%
Business trip	3%	2%	1%	5%
Language student	1%	1%	1%	2%
Total	100%	100%	100%	100%

Almost half of all visitors surveyed were visiting Salisbury for the first time (45%). Almost all visitors were visiting the town independently – only 9% were visiting as part of an organised group or tour.

The average length of stay for domestic staying visitors was around 3.5 nights. For overseas staying visitors it was around 6.9 nights. Figure 3 shows that over two thirds of all staying visitors in 2004 were on a short break of 1-3 nights (70%), up 9% points from 2002 (61%) but comparable with 2001 (70%) and 2000 (71%).

Figure 3. Length of stay (nights) in Salisbury 2000-2004



On average, day visitors were spending around 4.3 hours in Salisbury.

The highest proportion of visitors had travelled to Salisbury by private car (60%), while a relatively high 29% of all visitors used public transport to get to the city. Overall, of the 359 visitor groups who travelled to Salisbury by private motor vehicle, less than 5% had used the Park & Ride scheme. 62% used city centre car parks, including 76% of day visitors on holiday and 66% of day visitors from home. The remaining 33% of visitors would have used informal or on-street parking locations. This includes the 62% of staying visitors, who would presumably have left their vehicles at their accommodation base in Salisbury and either walked or used public transport to get to the city centre (Table 3)

Table 3. Use of car parking facilities in Salisbury

	Day visitors from home	**Day visitors on holiday**	**Staying visitors**	**All visitors 2004**
Base:	133	133	93	359
Used Park & Ride scheme	9 (7%)	7 (5%)	3 (3%)	19 (5%)
Used Town Centre car parks	88 (66%)	101 (76%)	32 (34%)	221 (62%)
Neither used	**36 (27%)**	**25 (19%)**	**58 (62%)**	**119 (33%)**

One third of all visitors had been into the TIC during their visit, well above the 'historic towns' average of 20%.

28% of all visitors had seen adverts, leaflets or promotions for Salisbury. Visitors were most likely to recall seeing City Maps (16%) or Mini-Guides (8%).

4. Visitor Expenditure

The average spend per staying visitor per 24 hours (including spend on commercial accommodation) was around £43. Staying visitors based in serviced accommodation in Salisbury spent an average of £28 on accommodation per person per night.

Day visitors to Salisbury spent an average of £14.69 per person per day. Table 4 shows that this was well below the average for 'all historic towns' (£21.73) and 'all destinations' (£21.62). It was also well below the average day visitor spend in Salisbury in 2002 (£23.12), mainly due to much lower expenditure on shopping in 2004.

Table 4. Average spend of day visitors (£/per person/per day)

Category of expenditure (£)	**Average spend (£) Day Visitors - Salisbury 2002**	**Average spend (£) Day Visitors - Salisbury 2004**	**Average spend (£) Day Visitors - Historic Towns**	**Average spend (£) Day Visitors - All Destinations**
Eating out	5.35	3.57	6.06	6.44
Shopping	14.87	8.78	11.56	10.64
Entertainment	0.40	0.86	1.96	2.11
Travel	2.16	1.48	2.15	2.43
Total average spend	**23.12**	**14.69**	**21.73**	**21.62**

5. Visitor Opinions

Relatively high levels of satisfaction were found among visitors to Salisbury on the various indicators which together comprise the 'visitor experience'.

The highest scoring indicators related to; the upkeep of parks and open spaces, the quality of service and usefulness of information in the TIC, the general atmosphere and feeling of welcome.

The lowest scoring indicators related to; value for money of places to eat and drink, the availability of public toilets and the cost of parking. None of the indicators, however, was rated less than 3.00 ('average').

82% of visitors rated the overall enjoyment of their visit as 'high' or 'very high'. 96% rated the likelihood of them recommending Salisbury to others as 'likely' or 'very likely'.

70% of visitors stated that the visit had met their expectations. 26% indicated that the visit had *exceeded* their expectations while only 3% indicated that Salisbury had failed to meet their expectations.

Particular likes visitors mentioned include: the cathedral, Cathedral Close and the historic aspects of the city including its buildings, narrow streets and 'olde worlde' feel. Visitors also liked the ambience or atmosphere of the city, the wide range of shops and the fact that the city is compact, with the main attractions of the city within walking distance.

Overall, 80% of respondents stated that ‘nothing’ had spoilt their visit to Salisbury. Unfortunately the rainy weather over the summer spoilt the enjoyment of the visit for a number of visitors. Traffic congestion, vagrants, unreliable public transport and litter were most frequently mentioned as aspects which detracted from the visit. A number of visitors experienced difficulty parking, and others felt that signposting to the city centre from the car parks could be improved.

6. Economic impact of tourism

An Economic Impact report produced by South West Tourism showed that in 2003 staying visitor spend was £60,390,000, whilst day visitors spend was £85,857,000. A further £9,911,000 is attributed to other tourism related spend. There were 5,468 jobs related to this tourism spending and 8% employment is supported by tourism.

Appendix XI

A Tourism Strategy for South Wiltshire, Consultation 2005, Salisbury District Council

(extract from summary of responses to consultation questionnaire)

Responses to consultation questions

Question		Yes	No	DK
9	Do you agree with our action plan proposals for accommodation?			
a	To have at least 100 4* bedspaces by 2015	78%	5%	16%
b	To increase the number of hotels inspected from 71% to 100%	84%	3%	13%
c	To increase the number of 3* or above hotels from 38% to 60%	74%	2%	24%
d	To increase the number of B&Bs inspected from 63% to 100%	80%	5%	15%
e	To increase the number of B&B 3υ or above from 58% to 80%	72%	5%	23%
f	To increase the number of B&B bedspaces by 10%	62%	8%	30%
g	To increase the number of inns inspected from 24% to 50%	79%	3%	18%
h	To increase the number of inns 3* or above from 21% to 38%	66%	8%	26%
i	To increase the number of self catering units 4* or above from 57% to 70%	59%	8%	32%
j	To ensure that all self catering units are 3* or above	76%	0%	24%
k	To increase the number of self-catering units in the city of Salisbury from 160 to 190	51%	11%	38%
Major issues raised: o Mixed views on need for more B&B and hotel accommodation				

Question		Yes	No	DK
10	Do you agree with our action plan proposals for:			
a	Visitor attractions	82%	8%	10%
b	Restaurants, pubs and bars	76%	8%	16%
c	Retail	73%	11%	16%
d	Conference	85%	0%	15%
e	Rural south Wiltshire	84%	0%	16%
Major issues raised: o Strong support for local independent, specialist shops o Conference facilities identified as an area for significant improvement				

Proposed changes to strategy

Sub section and details	Page No
Accommodation o 1a: add new outcome 'At least one high quality boutique hotel' o 1b: Change outcome to 'Overall increase in bedspaces from 942 to 1,170' o 1d: Change increase in bedspaces by 15%, from 1,043 to 1,200; add new outcome 'Establishment of a B&B start-up programme' o 1e: Change increase in inns inspected from 50% to 60% and no of inns 3 star or above from 38% to 50%; change target date to 2015 o 1e: Renumber 1f and change increase in inns inspected from 50% to 75% o Add new action 1e: 'To ensure a supply of good quality low-cost accommodation; target 2015; outcome 'Good supply of 2 star and similar accommodation' o Renumber actions 1f and 1g	10

Appendix XII

Salisbury District Local Plan, Adopted June 2005

Extract from Tourism Policy

Tourism

Objective: To promote Salisbury District as a tourist destination for all types of visitors, whilst recognising the need to protect the environmental quality of the District and the quality of life for its residents.

Tourist Attractions and Facilities

12.1 Tourism is of considerable importance in the Local Plan area, the most important tourist attractions being the city of Salisbury and Stonehenge, which draw visitors from Britain and overseas. The Local Planning Authority recognises the growing importance of tourism and the contribution it can make to the local economy, although it is conscious of the need to protect the environmental quality of the area. The Principles for Sustainable Tourism put forward by the Tourism and Environment Task Force (set up by the Secretary of State for Employment in August 1990) are fully supported in that they endeavour to emphasise the three-way relationship between the visitor, the place and the host community, and are based on the concept of sustainability and trusteeship - the idea that the needs of today's visitor should not be met at the expense of future generations. The policies in this chapter apply to all the plan area except the New Forest, policies for which are to be found in chapter 8.

Salisbury

12.2 The main attractions in the city are based on its historic heritage, for example, Salisbury Cathedral and Old Sarum. The twice weekly market also acts as an attraction, with resorts such as Bournemouth running special bus tours to Salisbury on market days. In order to remain popular with visitors, Salisbury's attractiveness has to be maintained. The Local Planning Authority is undertaking a programme of environmental enhancement and pedestrianisation schemes which will improve the appearance of the city. New local tourism signing policies of major attractions and car parks, together with the maintenance of the city to the highest level of cleanliness, will also add to the general appeal of Salisbury.

12.3 The tourist industry has undergone a number of major changes in recent years. Although long holidays still account for the majority of spending, there has been a growth in short break holidays and an increasing importance in overseas visitors and business tourism. One of the most significant consequences of these changes has been a marked increase in the number of visitors now staying in the city outside the high season months of July and August.

12.4 In view of this changing market, it is recognised that opportunities to improve wet weather facilities, and enable the holiday season to be extended, should be considered. The Salisbury Leisure Centre at the Butts, together with the proposed leisure pool, will provide better facilities for the local population as well as act as an additional tourist attraction. Opportunities may also exist to develop new attractions based on the heritage features of the plan area, such as an interpretation centre. However, great care will be needed to ensure that any such proposals do not conflict with policies to conserve the high quality landscape and the historic and architectural heritage of the area.
Policy T1

Amesbury

12.5 Amesbury is extremely well located to benefit from the large number of tourists that visit Stonehenge each year and also those that use the A303 Trunk Road as a route to holiday destinations in the South West. In line with the Local Planning Authority's aim of promoting economic development in the Amesbury area, opportunities may exist in the town to make better use of this potential and develop new tourist facilities. Amesbury already has an established town centre and a number of facilities that can provide for some of the needs of visitors.

Stonehenge

12.6 Stonehenge is a world renowned tourist attraction with around 700,000 visitors a year. The monument is visited either as a specific destination or part of a tour, or as a stopping point on an outward or return holiday journey. Refreshment, interpretative and parking facilities at the site are presently inadequate and policy T3 therefore allows for the construction of an appropriate tourist/visitor development for the Stonehenge World Heritage Site. However, this policy does not imply the automatic acceptability of any particular scheme; the other policies of this plan will need to be taken into account during the consideration of any development proposals.
Policy T3

Remainder of Plan Area

12.7 In order to protect the special qualities of the landscape within the Cranborne Chase and West Wiltshire Downs AONB and the Landscape Settings of Salisbury and Wilton, the development of new tourist attractions will not normally be permitted. Outside these areas, as with other forms of development, new tourist facilities and attractions in the countryside will be strictly limited and will only be permitted where they are related to the heritage and landscape features of the plan area. They should be small in scale and sympathetic to the character of the surrounding area. Uses which require extensive tracts of land and the construction of many buildings and/or other structures, for example theme parks and holiday villages, are not considered appropriate for this area, whereas limited visitor facilities (such as refreshments, interpretation centres, museums and exhibitions) associated with existing historical, archaeological or landscape attractions may be acceptable.
Policy T2

Tourist Accommodation

12.8 Most of the accommodation in Salisbury is long established and ranges from hotels to guest houses and bed and breakfast establishments. Elsewhere in the Local Plan area, there are a few small hotels in the villages, otherwise accommodation is limited to bed and breakfast facilities in private homes or public houses. Although, over recent years, significant improvements have been made to the existing stock, there is still scope for further improvement. The Local Planning Authority will support proposals to upgrade tourist accommodation provided that any such proposal is not detrimental to the surrounding built environment or the high quality landscape of the area.

12.9 **Hotels** Hotels make a particular contribution to the tourist industry in the city and form an important element in the stock of tourist accommodation. At present there are no 4 or 5 star hotels in Salisbury, although the city does have a number of hotels which are awarded highly commended, with 4 crowns certified by the English Tourist Board.

12.10 A recent survey commissioned by Salisbury District Council from the Southern Tourist Board highlighted the fact that single business travellers to Salisbury made up a large proportion of mid-week and out-of-season visitor nights. The business and conference tourist market is growing and the Council recognises the need for hotels to cater for these demands, with the provision of conference facilities and associated services such as adequate parking.

12.11 It is recognised that there is a need to provide a new large, high grade hotel in the city, to serve the group travel trade market and business conference market. However, due to the nature of the historic and built environment in the city centre, few acceptable schemes may come forward. There is also a lack of suitable sites in close proximity to the city centre, and around the periphery of the city there are significant landscape constraints.

Proposals for new hotels within settlements, including Salisbury, will normally be permitted, although they will be assessed in terms of their impact on the built and natural environment and the vitality and viability of the settlement.

12.12 Where sites for new hotels are proposed on the edge of settlements, the Local Planning Authority will require supporting information from applicants demonstrating that all potential sites in the adjacent centres have been thoroughly investigated and why they are inappropriate for the development proposed.

12.13 Where complementary uses, such as restaurants and pubs, are included in schemes on the edge of settlements, and are larger than the demand which would be generated by the hotel use, their impact on the adjacent settlement will be assessed.
Policy T4

12.14 In order to protect the high quality landscape of the plan area, proposals for new build hotels will not be permitted in the countryside. However, the conversion of large country houses to hotel use can, if approached in a sympathetic way, provide an attractive form of tourist accommodation. It is important that any new development which is required in connection with the conversion to hotel use does not detract from the character, appearance or quality of the building and its surroundings.
Policy T5

12.15 **Conversion of Existing Dwellings to Tourist Accommodation** The conversion of dwellings to guest house or bed and breakfast use is generally considered acceptable. This is, however, dependent upon car parking provision being available and there being no undue disturbance to surrounding neighbours. The nature of the plan area is such that the potential for developing self-catering accommodation is limited. However, opportunities may exist, on a small scale, to develop some self-catering accommodation through the conversion of, for example, farm buildings (provided that the proposals are in accordance with policies C22 and C23) which could supplement farm incomes, or outbuildings attached to public houses. It may be necessary to control such developments by legal agreements to ensure that holiday use does not turn into full residential use, which could conflict with other policies in this plan.
Policy T6

12.16 It is not considered that there is any scope within the plan area for the large scale “Center Parcs” style holiday village. Large scale development of static holiday caravans and other holiday accommodation, such as chalets and cottages, will be resisted throughout the plan area due to its highly sensitive character in landscape terms. Small scale development would, however, offer the opportunity to extend the range of holiday accommodation available and should be located within or adjacent to settlements which offer a range of facilities to the tourists.
Policy T7

12.17 **Camping and Caravan Sites** Sites for touring caravans and campers can have a detrimental impact on the landscape, and as such, need to be carefully controlled, particularly within the AONB. Elsewhere in the District, the landscape of the Local Plan area is sensitive and it is therefore important that touring caravan and camping sites do not detract from this high quality environment. Small sites for five units or less which are certified by the Camping and Caravanning Club or the Caravan Club do not require planning permission. There are no permanent sites for caravans and campers within or on the edge of Salisbury and it is

acknowledged that there is a need for such a facility near the city. Facilities for Caravanning and Camping will be improved in the city with the expansion of Hudson's Field. The Local Planning Authority acknowledges the contribution which the site at Alderbury provides in enhancing tourist accommodation in the Salisbury area.
Policy T8

12.18 Elsewhere, any new campsites will be expected to be located in or adjacent to settlements, for example Amesbury, Downton, Mere or Wilton or main holiday routes (A338, A303, A360 and A36), and will need to be well screened from vantage points, highways and residential development as well as satisfying the other general criteria for development in policy G2.
Policy T9

Tourism Policies

NOTE: Policies for tourism in the New Forest are contained in Section 8.

Tourist Attractions and Facilities

T1 The development of new tourist attractions or facilities, or the improvement of existing tourist attractions or facilities, will be permitted within the physical limits of settlements.

T2 In the countryside, outside the New Forest, proposals for the development of new tourist attractions or the improvement of existing ones, will be considered against the following criteria:

(i) where a proposal affects a Site of Special Scientific Interest, an Area of High Ecological Value, a Scheduled Ancient Monument or an Area of Special Archaeological Significance, the development will be permitted only if there will be no adverse impact on the designated area;
(ii) within the Cranborne Chase and West Wiltshire Downs Area of Outstanding Natural Beauty or the Landscape Settings of Salisbury and Wilton, proposals will be permitted only where they are small in scale and would be compatible with the special landscape quality of the area;
(iii) otherwise proposals will be allowed provided they do not entail the erection of large buildings or structures.

T3 It is proposed that a new visitor centre will be provided for the Stonehenge World Heritage Site.

Tourist Accommodation

T4 The construction of new hotels will be permitted within or on the edge of settlements subject to there being no adverse impact on the vitality and viability of adjacent centres. Where sites on the edge of settlements are proposed, the applicant will be required to demonstrate that all sites in the adjacent centre(s) have been investigated.

T5 In the open countryside, unrelated to any settlement, proposals for the development of new hotels will not be permitted.

T6 Proposals for the change of use of buildings to hotel, guest house, bed and breakfast or self-catering accommodation will be permitted, subject to there being no adverse effect on the amenities of dwellings in the area.
Extensions should be subordinate to the existing buildings and not detract from their appearance or the quality of their surroundings.

T7 Proposals for the change of use of buildings to hotel, guest house, bed and breakfast or self-catering accommodation will be permitted, subject to there being no adverse effect on the amenities of dwellings in the area.
Extensions should be subordinate to the existing buildings and not detract from their appearance or the quality of their surroundings.

T8 Within the Cranborne Chase and West Wiltshire Downs Area of Outstanding Natural Beauty, the establishment of large scale sites for touring caravans and tents will not be permitted. Permission for small scale sites will be granted where it can be demonstrated that the site is adequately screened and the development would not have an adverse effect on the quality of the landscape. Compliance with criteria listed in policy T9 will also be required.

T9 Elsewhere in the plan area, the establishment of new sites for touring caravans and tents will be allowed within, or adjacent to, settlements or adjacent to the main holiday routes, subject to the following criteria:

(i) sites are well screened from vantage points, highways and residential development and trees and other landscaping materials are planted among the caravan and tent plots as well as around the edges of the site;
(ii) the proposals would not adversely affect land of nature conservation value;
(iii) there is no direct access from trunk roads or from primary routes where access to a secondary road is feasible; and
(iv) the use of the site would not be detrimental to the amenities of the residents of the area and would not conflict with neighbouring land uses.

Appendix XIV

Business Tourism Briefing: An overview of the UK's business tourism industry, January 2003, Business Tourism Partnership

(Extract)

Business tourism is a sector of the wider tourism industry. It encompasses:

1 - conferences and meetings (estimated to be worth £7.3 billion annually by the *British Conference Market Trends Survey 2001.* This figure represents an increase of some 10% on the previous figure of £6.6 billion for 2000, quoted in the 'BTP Manifesto'. In part this may be due to a change in methodology, in part to the substantially greater sample size, and hence more representative findings, for the 2001 research. The estimate will be monitored on an annual basis, with updated figures included in the re-named 'British Conference Venues Survey'.)

2 - exhibitions and trade fairs (estimated to be worth £2.04 billion annually) Exhibitions are the 5th largest marketing medium attracting 11% of media expenditure in the UK. This figure does not include the value of business transacted at exhibitions

3 - incentive travel (1996 research, the latest available, estimated the inbound incentive travel market to be worth £165 million annually)

4 - corporate events (estimates value this segment at between £700 million and £1billion annually)

5 - outdoor events (estimated value of at least £1billion annually)

6 - business (or individual corporate) travel. No reliable estimates of this segment exist, although *Business Tourism Leads The Way* suggested that it was worth upwards of £6 billion per annum in 1998.

Over the past ten years, there has been a 53% growth in all business trips, exceeding the overall tourism growth rate. In its totality, the sector generates 29.7% of all overseas visitors and 31.7% of inbound tourism earnings for the UK, according to the *International Passenger Survey 2001*, published by the Office for National Statistics. The conference and incentive travel segments are predicted to grow at a faster rate than any other tourism sector up to 2010. Revenues from international business tourism are estimated to account for up to 45% of total international tourism income by 2010.

Principal characteristics of business tourism include the following:

• it is at the high quality, high yield end of the tourism spectrum

• business tourism is year-round, peaking in Spring and Autumn but still with high levels of activity in the Summer and Winter months, thus sustaining permanent, full-time employment. It is estimated that the sector nationally employs around 530,000 people both directly and indirectly

• it complements the leisure tourism sector, relying on much of the same physical infrastructure, and bringing business to destinations such as seaside resorts which would otherwise be dependent upon a relatively short Summer season for their economic health and prosperity

• investments in business tourism facilities lead to the regeneration of urban and inner city areas, as evidenced by cities such as Birmingham, Belfast, Cardiff, Glasgow and Manchester

• many of the investments in a destination's infrastructure designed primarily for the business tourist (hotels, transport and communications facilities, restaurants, attractions and amenities, even conference auditoria) provide benefits which can also be enjoyed by the leisure tourist and the indigenous population

• it is resilient, being much less affected by economic downturns or by disasters such as the Foot and Mouth Epidemic than leisure tourism and other sectors of the national economy

• business tourism stimulates future inward investment as business people see the attractions of a destination while travelling on business or to attend a conference, exhibition or incentive, and then return to establish business operations there. They can also become unpaid 'ambassadors' for a destination by communicating to colleagues and others their positive impressions and favourable experiences

• the higher quality of personal service demanded by the business tourist requires more labour-intensive service suppliers, which in turn translates into higher levels of job creation. For example, 68% of all tourism jobs in Harrogate are created and sustained by business tourism (principally conferences and exhibitions), only 32% by leisure tourism. Around 22,000 jobs in the West Midlands are sustained by the NEC Group of venues (National Exhibition Centre, International Convention Centre, Symphony Hall, and the National Indoor Arena). The Scottish Exhibition and Conference Centre (Glasgow) directly supported over 3,300 jobs in Glasgow and in other regions of Scotland in 2001

• research (*Conference Delegate Expenditure Survey 1998)* suggests that approximately 40% of business travellers will return with their families as leisure visitors to destinations they have enjoyed visiting on business

• business tourism is sustainable, offering higher added value with fewer negative environmental impacts than mass leisure tourism. Furthermore, conference and incentive visitors are together as a group, so that it is possible to inform and educate them about the local community in which their event is being held in order to maximise the enjoyment of their stay but also to minimise any disruption and possible inconvenience to the local resident population. It is very much harder to manage, in the same way, the impact of individual leisure travellers on a destination.

The individual segments of business tourism (conferences and meetings, exhibitions and trade fairs, incentive travel, corporate events, outdoor events) are the five segments which are the prime focus of marketing activities by venues and destinations, because decisions about where the events take place are open to influence. The organisers of the event may have greater flexibility in deciding where it is held, and are able to use their own judgement or discretion. For this reason, these five segments are often described as 'discretionary'. Individual business travel, on the other hand, is termed 'non-discretionary' because, while the mode of transport (road, rail or air, for example) used by the individual traveller is open to influence, their actual travel destination is not.

Appendix XV

South West Tourism Business Barometer, July to September (3rd Quarter) 2005, South West Tourism (extract)

130 panellists responded to this quarter's survey providing a 48% response rate. 81% of panellists are accommodation businesses, and responses originate from all counties in the South West of England, with the largest proportions from Devon, Cornwall and Somerset. 46% of tourism businesses in the region have perceived an increase in business activity in the third quarter of 2005 compared to the same period in 2004 whilst 26% perceived business levels to be similar to those experienced in the third quarter of 2004. However, 25% have perceived a decrease in business activity. The largest increases in visitor numbers coming from overseas visitors and domestic visitors from outside of the South West region. Sample sizes prevent analysis in some counties but the largest county samples in this quarters barometer from Devon, Cornwall and Somerset all show the majority of businesses reporting increases in business activity.

The actual business activity volume change calculated for the 3rd quarter of 2005 is +8% compared to the same period in 2004. This is the first increase in actual change reported for this year although the Business Barometer also shows over three quarters of businesses (78%) reporting increases in business costs, whilst 56% of businesses reported increases in business turnover. A further 25% reported decreases in turnover.

The third quarter of 2005 saw similar capacity usage to the corresponding period in 2004. 59% of businesses were operating above 75% capacity, 18% of businesses were operating between 61 - 75% of capacity and 17% of businesses operated below 60% of capacity.

Compared with the same period in 2004, marketing/promotional spend continues to remain static amongst the majority of panellists during the third quarter of 2005, however, 24% of businesses reported an increase in their spend. Amongst those businesses reporting an increase the average increase was 23%. Overall 31% of businesses offered discounts during the third quarter of 2005 with 'other' businesses again being the most likely to do so.

The outlook for the next quarter from panellists shows the largest proportion of businesses (38%) are expecting similar visitor levels to the fourth quarter of 2004, 24% of businesses are expecting increases with 28% of businesses expecting decreases in business levels. Whilst there remains only a marginal difference between the two factors, 'economic /consumer spending slowdown' is again seen by businesses as the main limiting factor for business in the fourth quarter of 2005 ahead of 'the weather'. In fact, the top three limiting factors for the fourth quarter remain unchanged from the previous quarter with similar proportions of businesses highlighting them perhaps indicating that the factors raised in previous quarterly reports are not short term.

On balance, businesses in the South West continue to feel less optimistic for the short-term future of tourism with the optimism index recording a negative index score of –6, however, this does represent a significant upward shift from the index scores recorded for the first two quarters of 2005. It should also be noted however that whilst the optimism index score remains negative 48% of businesses have similar levels of optimism now as they did in the same period of 2004. Rising fuel costs, economic slowdown, budget airlines and overseas competition are among the main themes cited by those businesses that are less optimistic for future prospects. In contrast, those businesses that are optimistic for the future are witnessing good levels of advanced bookings, expect good levels of short breaks in the immediate future and a positive spin off from the good weather enjoyed this summer. In summary, the third quarter report would indicate that good levels of business are achievable although the number of strong limiting factors would suggest that these are by no means assured. Quality and marketing would appear to be recurring themes amongst optimistic businesses in recent reports.

Appendix XVI

South West Tourism Occupancy Survey, 2004 Serviced Accommodation Results, South West Tourism (extract)

% room occupancy	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Unitaries	51	67	60	66	68	70	75	77	74	73	65	56
Cornwall	30	40	38	56	63	70	79	82	72	55	39	43
Devon	36	42	44	54	51	64	72	76	69	56	42	42
Somerset	32	38	31	51	53	56	64	65	63	55	45	42
Wiltshire	**53**	**59**	**53**	**56**	**64**	**61**	**66**	**64**	**67**	**62**	**55**	**58**
Dorset	27	45	44	43	49	59	69	68	67	52	35	27
Region	**38**	**47**	**46**	**56**	**58**	**65**	**73**	**76**	**70**	**59**	**46**	**45**

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(extract from Market Opportunities and Profiles – A Market Overview)

Figure 3.1 shows the relative size of these market segments in the SW. The size of each circle is in proportion to the number of nights spent in the Region. This clearly underlines the dominance and importance of the holiday market.
For the purposes of the segmentation exercise we have split the holiday market in a number of ways, by lifecycle (eg pre-family), by holiday type (eg activity/group) and by length of holiday (eg break/holiday). Note that in terms of the latter we have adopted a split of breaks (1-6 nights) and long holidays (7+nights) rather than the more usual split of 1-3 and 4+ nights which has been used as a basis for forecasting in chapter 2. We believe this represents a more useful way of looking at the holiday market and reflects the findings from the focus groups where there was a strong consensus that a holiday was at least a week away (ie 7+ nights) and anything else was a break.
Under this definition, breaks lead the field in terms of the scale of visits and spend and are hugely important to the Region, although in terms of nights they are on a par with longer holidays. The holiday market as a whole is dominated by the family and post family groups, with the pre-family groups making a relatively modest contribution.
Other sectors of tourism are much less significant but none the less play an important role in some areas. Overseas visits are small in terms of volume but rather more important in terms of value. VFR trips present the reverse picture whilst business tourism falls somewhere in between the two. Added together, overseas, VFR and business tourism exceed the volume and value of long holiday trips. Day trips are not shown in Fig 3.1 but it is worth noting that the overall estimated spending from day trips is not dissimilar to that from domestic staying visitors as a whole.

Fig 3.1 Volume and value of SW market segments

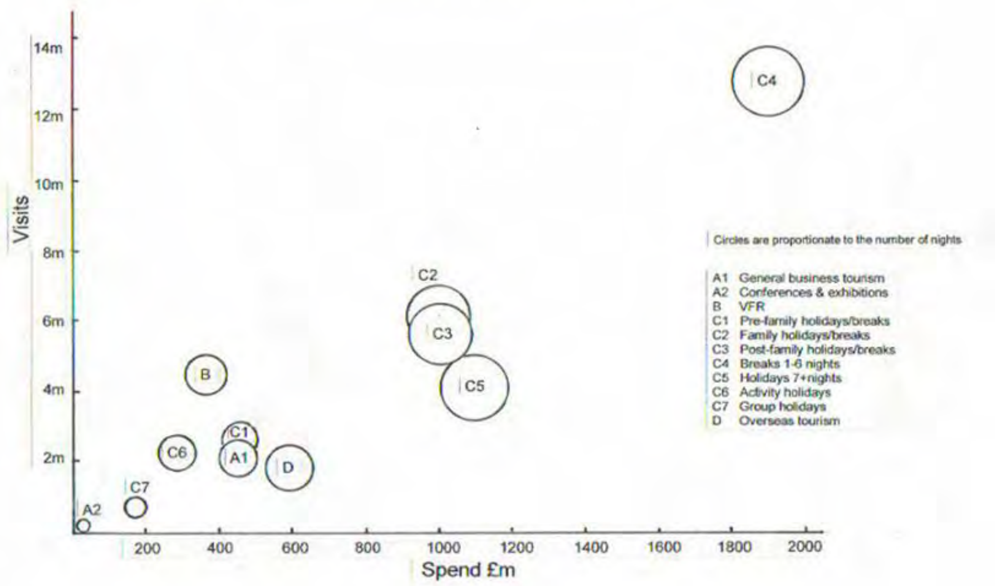


TABLE 3.2 Size and importance of SW segments

Segment	Trips (m)	Nights (m)	Spend £m	Trip Length	£/trip	£/night	SW market Share %	Growth potential
A1 General business	2.1	6.1	452	2.9	215	74	10	H/M
A2 Conferences.exhibitions	0.2	0.6	33	3.0	165	55	10	H/M
B VFR	4.5	10.8	362	2.4	80	34	12	H
C1 Pre-family holidays/ breaks	2.6	7.9	450	3.0	173	57	14	M
C2 Family holidays/ breaks	6.2	28	1000	4.5	161	38	17	M/L
C3 Post-family holidays/ breaks	5.6	26	1000	4.6	178	38	20	H/M
C4 Breaks 1-6 nights	12.8	37.2	1897	2.9	148	51	15	H
C5 Holidays 7+ nights	4.1	34.5	1094	8.4	267	32	24	L
C6 Activity holidays	2.3	8.0	281	3.5	122	35	13	M
C7 Group holidays	0.7	3.2	170	4.5	243	53	23	M
D Overseas total	1.9	15.0	634	7.9	334	42	8	M
D1 USA	0.3	1.5	85	5	265	54	9	M
D2 Australia	0.1	0.9	39	9	300	38	20	M
D3 Germany	0.2	1.7	63	8	275	36	10	M/L
D4 France	0.3	2.5	74	8	264	31	10	M/L
D5 Ireland	0.15	0.8	40	5	265	51	8	M/L
E1 Day visits	148	0	3771	-	26	-	13	M/L
E2 Group day visits	4	0	90	-		-		M/L

Segment	Relevance to

	Rural coast	Seaside resorts	Inland rural	Protected rural	Cities towns	Small towns
A1 General business						
A2 Conferences.exhibitions						
B VFR						
C1 Pre-family holidays/ breaks						
C2 Family holidays/ breaks						
C3 Post-family holidays/ breaks						
C4 Breaks 1-6 nights						
C5 Holidays 7+ nights						
C6 Activity holidays						
C7 Group holidays						
D Overseas total						
D1 USA						
D2 Australia						
D3 Germany						
D4 France						
D5 Ireland						
E1 Day visits						
E2 Group day visits						

We now look at the market opportunities provided by each of these segments in turn drawing on the information in the segment profiles. Key indicators are summarised in Table 3.2. In examining the potential of these we have looked at them in terms of:

- The current **importance** of the segment in terms of its size and value and market share season and relevance to destinations and businesses in the region

- The **feasibility** of attracting the segment to the region given the product fit, competition, cost of reaching the market and ability to influence it.

The boxes below summarise the findings and highlight the main market opportunities. More detailed information will be found in the accompanying segment profiles.

A1 GENERAL BUSINESS TOURISM			
Trips: 2.1m	*Nights:* 6.1m	*Spend*: £452m	*Market share:* 10%
Attractiveness		*Feasibility*	
Medium sized segment for the SW. High spending with good potential for growth and is counter seasonal to leisure tourism. Most parts of the Region will benefit although it is not evenly distributed. Particularly important in large towns and cities.		Difficult to influence the overall level of business tourism that is largely determined by external factors.	

This is an important market region-wide although the SW market share is relatively low. The scope for action and influence is limited because levels of business activity are primarily driven by local economic activity. The main priority is to ensure that an adequate business tourism infrastructure is in place and that business visitors' needs are being met. The main market opportunity lies in building relationships with business visitors to encourage return leisure visits through loyalty schemes, special promotions and information.

A2 DISCRETIONARY BUSINESS TOURISM			
Trips: 0.2m	*Nights: 0.6m*	*Spend: £33m*	*Market share*: 10%
Attractiveness		*Feasibility*	
Discretionary business tourism (meetings, incentives, conferences and exhibitions) is a small, high value, niche market which is very important for a few destinations and enterprises, particularly some resorts and major towns/cities, but not widespread. It has good prospects for growth.		This is a market that is susceptible to influence and relatively cost effective to reach through third parties such as conference organisers. However, there is strong competition from within the UK and the SW is not especially rich in product and facilities. The main audience is likely to be domestic.	

This is a small specialist market, not of general interest but very important to a few destinations and facilities. Because it is open to influence and valuable it is highly sought after and quite competitive. This is not a major strength for the SW. The main market opportunities lie with:

- Larger meetings of association and corporate conferences
- Regional exhibitions
- Incentive trips from Europe
- Smaller day meetings taking place in hotels and other facilities.

B VFR			
Trips: 4.5m	*Nights: 10.8m*	*Spend: £362m*	*Market share*: 12%

Attractiveness	Feasibility
Large segment but relatively low value. Of interest to all parts of region although more important in areas of high population density. Good potential for growth. Good seasonal spread.	The product is the people living in the region. Hard to influence overall volume but can encourage local spend. Reach through local population. No real competition.

This is an important market for the SW of interest to most places within the Region although there is limited scope to influence the level of activity and expand it. The main market opportunity lies with incentivising and encouraging local people to take their visitors out and about in the local area, generating spin-off for local attractions, pubs, restaurants etc. This is primarily the responsibility of destinations and local enterprises.

C1 PRE-FAMILY HOLIDAYS/BREAKS			
Trips: 2.6m	*Nights: 7.9*m	*Spend*: £450m	*Market share:* 14%
Attractiveness		*Feasibility*	
Medium sized segment for the SW. Primarily interested in short breaks so some growth potential. High spend per night reflecting breaks. Less concentration in summer peak than other holidays. Relevant to much of Region with most interest in cities/ resorts.		Low awareness of region and not great product fit. Lot of competition from UK and abroad. Internet is good medium to reach this group.	

This is the smallest of the holiday segments for the SW and is the most difficult to attract given the low awareness and interest. However, it is important that the SW doesn't lose contact with this group because it forms potential visitors for the future. There is no point trying to sell holidays to this segment, the main market opportunities lie with:

- Weekend city and resort breaks, based around entertainment, youth culture and events aimed at young singles/couples aged 18-25.
- Adrenalin and extreme sports have strong appeal to this group.
- Romantic, shopping and city breaks aimed at older (25-35) couples
- Capitalising on the appeal of key locations and attractions which already have a strong resonance in this market such as Newquay, Bath and Bournemouth

C2 FAMILY HOLIDAYS			
Trips:	*Nights: 28*m	*Spend*:	*Market share:* 17%

6.2m		£1000m	

Attractiveness	*Feasibility*
Large and valuable segment for the SW which has above average market share. Medium growth prospects but lower than for other holiday sectors. Heavily concentrated in summer peak. Bias towards coast and west of Region.	Positive attitude to SW for both holidays and breaks. Good product match and relatively easy to reach market. Strong competition from destinations abroad for holidays.

This is a key segment for the SW which has a higher than average market share of the UK market. The family segment is already favourably disposed to the SW and has a positive view of the Region, albeit primarily focussed on Devon and Cornwall and to a lesser extent Dorset and Somerset. This market is looking for good value, no hassle, holidays and breaks in attractive settings with a range of activities to keep the children occupied and happy even if it rains. This segment will travel for breaks and longer holidays although many would go abroad by preference. The main opportunities lie with:

- Less affluent families taking main summer holidays seeking resorts and self catering accommodation on or near the coast
- More affluent families taking week long additional holidays in the shoulder periods, half term, Christmas/New Year. Countryside and coast, generally self catering.
- Weekend and longer 4/5 day breaks aimed at all groups throughout the region, Easter to October and making use of serviced and self catering accommodation.

C3 POST-FAMILY HOLIDAYS			
Trips: 5.6m	*Nights: 26*m	*Spend*: £1000m	*Market share: 2*0%
Attractiveness		*Feasibility*	
A large and valuable segment for the SW with a high market share. Good growth prospects, slightly less seasonally peaked than family holiday market and widespread relevance across region.		Good product fit although abroad is seen as preferred destination by many. Good level of product knowledge and awareness with breaks being driven by special offers. Reach through traditional media.	

This is a key segment for the SW which already has a high market penetration. The post-family segment has a positive view of the Region and a good level of product awareness and is set to increase in size. This group puts a high premium on value for money and quality and many will also be holidaying and increasingly taking breaks abroad. They are looking for scenery, interest and soft activities and are primarily interested in serviced accommodation. The main market opportunities are:

- Bargain breaks of any length (2-5 days) outside the main summer season, in good quality serviced accommodation. Special offers are a key driver for these.

- Week long holidays outside the school holidays, primarily in serviced accommodation.

All sections of this market are susceptible. The empty-nesters and newly retireds are serial holidaytakers and will take holidays abroad as well as in the UK. The 'silver-greys' (70+) take less holidays but are more likely to take them at home.

C4 BREAKS (1-6 nights)			
Trips: 12.8m	*Nights:* 37m	*Spend*: £1897m	*Market share:* 15%
Attractiveness		*Feasibility*	
Excellent growth potential, high value and volume and SW has reasonable market share. Less seasonally peaked than main holidays and wide relevance across the Region.		Short lead times and less destination focused than long holidays. Wide appeal to all groups but significant competition from abroad and other UK destinations. Susceptible to special offers and promotions	

The breaks market is huge and growing and the SW is relatively well placed to attract this business although it doesn't have a particularly high market share at present. The main market is for people within a 2 to 3 hour drive time of the Region and 25% of breaks originate from within the Region itself. The main market opportunities are:

- Weekend breaks aimed at pre-family segments based in towns/resorts
- Weekend breaks aimed at families in family friendly hotels and self catering accommodation
- Weekend and mid week breaks aimed at the post-family group in good quality hotels

C5 HOLIDAYS (7+ nights)			
Trips: 4.1m	*Nights:* 34.5m	*Spend*: £1094m	*Market share:* 24%
Attractiveness		*Feasibility*	
An important segment for the SW, which has a very high market share in this sector. Spend per trip is quite high because of reasonable length of stay. Growth prospects are limited however. Most relevance to seaside and countryside and to the west of the Region. Quite seasonal.		The SW has a good reputation for long holidays although faces significant and increasing competition from abroad. Long holidaytakers are more destination focused than break takers and can be influenced.	

This is an important segment for the SW, which has a strong presence in the marketplace. However the market as a whole is in decline and so it may be hard to grow this segment other than by increasing market share.
The key market opportunities for the SW lie in:

- Main summer holidays in July and August aimed at less affluent families focused on self catering accommodation.
- Additional and secondary holidays aimed at more affluent families in the shoulder period and school holidays. Primarily self catering.
- Holidays of a week or so aimed at the post family market outside school holidays using serviced accommodation and self catering.

C6 ACTIVITY AND SPECIAL INTEREST HOLIDAYS				
Trips: 2.3m	*Nights: 8.0*m	*Spend*: £281m		*Market share:* 13%
Attractiveness		*Feasibility*		
Medium sized segment but not particularly high spend. Less seasonally peaked than holidays as a whole and can attract people on the back of the activity. Modest growth expected. Huge range of potential activities so potentially relevant to most parts of the Region.		Good product fit but Region has only average market share. Strong competition. Relatively easy to reach market but complicated by wide range of activities with small markets for each. The internet is an important tool for reaching small niche interests.		

Activity holidays are an important sector of holiday tourism but also highly fragmented. Outside the main activities the market for a particular sport or interest is often tiny. The main market opportunities are:

- DIY activity holidays where people make their own arrangements. The need primarily is about raising awareness and providing information to enable people to construct their own packages. The main demand is for the big activities of walking, cycling, golf, fishing and watersports.
- Inclusive packages covering a wide range of interests and activities provided by a host of small operators.
- Informal activity programmes for people to access whilst on holiday. This is particularly important for children and families. Primarily the responsibility of destinations and local enterprises
- Activities where the SW has a competitive edge such as surfing and watersports, where it can develop a high profile and reputation

C7 DOMESTIC GROUP HOLIDAYS			
Trips: 0.7m	*Nights 3.2m*	*Spend*:	*Market share: 24%*

		£168m	

Attractiveness	*Feasibility*
A small market where the SW has a very high market share. Although renowned for being price sensitive, spend per trip is relatively high. Less seasonal than holidays as a whole and well spread throughout the Region. Particularly important for resorts and larger hotels. Potential for further growth.	The SW has a good product fit and is competitive with other parts of the UK although there is increasing competition from abroad. The market is relatively cheap to reach via intermediaries.

This is a relatively small and specialised market but one where the SW has traditionally performed well and has a high market share. The market has proved to be more resilient than many thought and appears to be surviving quite well. The key market is the less affluent over 55s on 4/5 day breaks and longer (7+) holidays. These are primarily centred holidays with day excursions rather than touring holidays.

D OVERSEAS VISITORS			
Trips: 1.9m	*Nights:*15.0m	*Spend*: £634m	*Market share:* 8%
Attractiveness		*Feasibility*	
A medium size segment for the SW which has a low market share of overseas tourism, much of which is focused on London. High spend per trip. Has shown significant growth in past but		Product is OK but generally low awareness of Region in overseas markets. Significant competition from other destinations in UK and abroad. Expensive and difficult to reach.	

recent events have depressed inbound tourism. Modest growth projected in future. Not evenly spread throughout the Region. Quite seasonal.	

Overseas tourism is relatively high spend but forms a small proportion of tourism in the SW. Half of this is accounted for by business and VFR tourism which is less discretionary than holiday tourism. Recent events have temporarily halted the long term growth of overseas tourism.
Five countries (USA, Australia, Germany, France and Ireland) account for over half (60%) of the Region's overseas tourism. There is a clear distinction between short haul and long haul visitors. The latter are far more likely to visit the SW as part of a longer tour of the UK, whilst visitors from Europe are more likely to treat the SW or the SW/Southern England as a destination in itself. The main market opportunities are:

- Long haul destinations: Seniors, empty nesters and young singles/couples visiting the UK on an extended tour and including the SW as part of the itinerary.
- Western Europe: All age groups.

E2 GROUP DAY VISITS			
Trips: 4m	*Nights: 0*	*Spend*: £90m	*Market share:*
Attractiveness		*Feasibility*	
Small market but important for some attractions and destinations. Limited potential for further growth. Quite seasonal.		Good product but competitive market and price sensitive. Easy and cost effective to reach via intermediaries.	

A relatively small market and modest value although it equates to the same spend as made by USA visitors. Much of this is internally generated within the Region, although organised day visitors will travel further than independent day visitors. Primarily of interest to visitor attractions, retail and catering sector and certain destinations.
There are several distinct market segments:

- Outings from clubs, retirement groups etc with strong bias to the older age groups
- Coach operator excursions from home and holiday destinations which tend to be relatively

downmarket

- School and education trips

Appendix XVII

State of Tourism South West – Intelligence Report, July 2003 – produced by The Tourism Company for South West Tourism and the South West Regional Development Agency

Extract from Market Opportunities and Profiles – Strategic Priorities

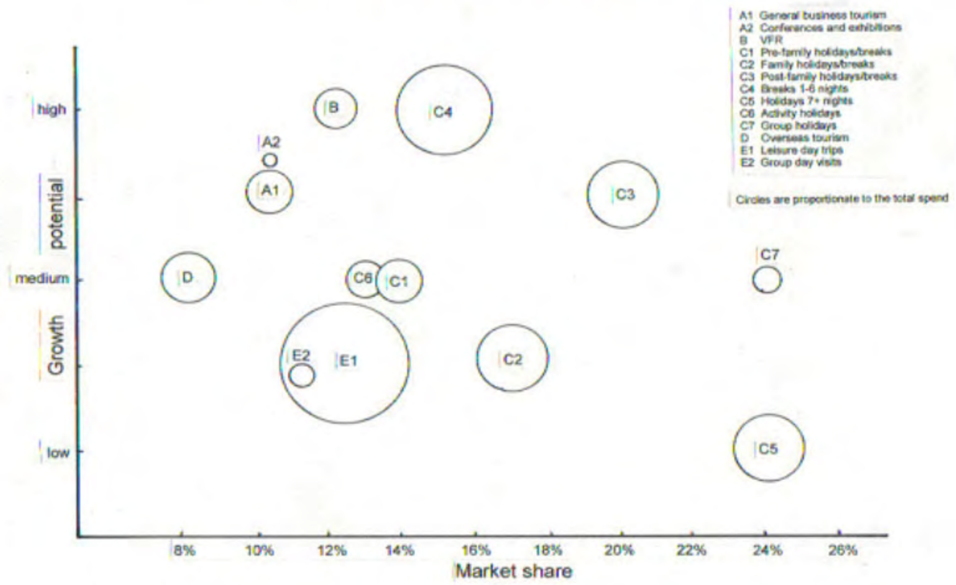
It is not possible to agree a set of market priorities that will apply to all destinations and enterprises in the SW. Market priorities will inevitably vary according to local circumstances. What makes sense for a hotel in Swindon will not be appropriate for a caravan site in West Cornwall or a district council in Dorset. It is up to individual operators and places to determine their own market strategy in the light of their own experience and knowledge.

Nevertheless, from a regional perspective it is possible to begin to identify some broad strategic priorities which might form the basis for a marketing strategy.

Figure 3.2 shows the various market segments discussed above plotted by market share and growth potential. The size of the circles are proportional to the value of the segment. Segments where the Region has a high market share indicate that the SW has been successful in attracting that market in the past and perhaps has some competitive advantage. In an ideal world the Region would be best advised to target segments which are valuable, have the best growth potential and where it has a high market share.

On this basis, the post family holiday market looks like a good proposition, as do coach holidays although they are only a small market. Breaks are attractive because of the growth potential although the Region does not have a particularly high market share. It does well in long holidays in terms of market share although growth prospects look weak. Many of the other market segments are really quite small in terms of value.

Fig 3.2 Market share and growth potential of SW segments



In the light of the preceding analysis and the information contained in the segment profiles we have distinguished between three broad categories of market priority and significance which might form a basis for future marketing strategy. We have divided these into:

- Primary markets
- Secondary markets
- Support markets

Primary markets - These are the main drivers of tourism in the SW, have widespread importance right across the Region and offer the best potential for future growth and prosperity. It is critical to get these right and, whilst much of the marketing will be done at the level of the sub-region and below, regional co-ordination and input will be required. Key market opportunities and products will be:

- Weekend breaks aimed at the pre-family market
- Breaks of any length and additional holidays aimed at the post family market
- Breaks and additional holidays aimed at affluent families
- Main summer holidays aimed at less affluent families
- Breaks and holidays aimed at key Western Europe markets

Secondary markets - These are smaller niche markets which are of less value and significance in themselves or of interest only to a small number of destinations and enterprises. Although their impact is less they are nevertheless important because they add diversity, spread the risk and create new opportunities. The market segments in this category consist of:

- Activity holidays
- Discretionary business tourism
- Coach holidays

To which we might also add segments such as:

- Cruise ships
- Language schools

Supporting markets - These are importance sectors of tourism and help support the tourism infrastructure and many enterprises but there is relatively little that can be done at a regional or sub-regional level to influence them. Action is primarily down to the level of the enterprise or destination. These include:

- General business tourism
- VFR
- Independent and group day trips

(Visitors defined as having visited the region for a break or holiday in the past 3 years.)

Appendix XVIII

State of Tourism South West – Intelligence Report, July 2003 – produced by The Tourism Company for South West Tourism and the South West Regional Development Agency

Extract from Segment Profiles

A1 GENERAL BUSINESS TOURISM (UK)

Market definition

UK residents staying overnight for reasons connected with work and business. Includes general business meetings, sales calls etc but excludes attendance at conferences and exhibitions. (*Note the figures quoted refer to all business tourism including MICE sectors)*

Market size and value

23m business trips (involving an overnight stay) took place in the UK in 2001 (*includes conferences and exhibitions)* with a total associated spend of £5670m. Three quarters of UK business trips take place in the Midlands and southern England. There are countless more day trips.

Importance to SW

In 2001 there were 2.3m overnight business trips in the SW accounting for 6.7m nights and a spend of £485m. *(2.1m trips if exclude conf/exhibs)*

The SW region has a market share of 10% of UK business trips and 8.5% of spend. The North West, London and Heart of England regions have a higher market share.

Business tourism is an important strand of tourism in the region accounting for 9% of all domestic tourism trips and 13% of domestic tourism spend in the SW.

Areas and sectors which benefit

Occurs throughout the SW region but particularly important in urban areas and where there are concentrations of economic activity. Almost a third (30%) of business trips take place in Devon with the remainder being evenly distributed amongst the other counties.

Business tourism is very important for supporting and maintaining an infrastructure of quality hotels and has significant spin-offs for transport services and restaurants.

Market characteristics/profile

Business trips are higher spending than average. (£73 per night) but tend to be of short duration (2.9 nights)

They are primarily car-borne (72%) although a significant proportion arrive by train and plane (15%).

They are big users of hotels (59%)

Half of all business trips are concentrated in large towns/cities, the rest are evenly spread.

Business tourism is counter-seasonal with troughs in school holidays.

Compared to all visitors, business visitors are more likely to be:

- Male (78%)
- Middle aged 35-54 (48%)
- Up market - ABC1 (72%)
- Travel from further afield (52% come from outside SW/SE/L)
- Be better-off (37% have household income > £40K)

Trends and prospects

General business tourism is driven by the overall state of the economy and tends to follow the economic cycle. Nationally, business tourism has shown some modest growth over the past 6 years although there have been fluctuations from year to year. The region has followed a similar pattern.

Forecasts carried out for this study suggest that business tourism will grow by 39% in the period 2001-2011. Nights are expected to grow by the same amount and spend by significantly less (16% in real terms). These projections assume SW retains its 2001 market share although in the past decade SW has increased its market share of business tourism.

What the market wants

Good and efficient transport links by road, rail and air, although this is a double edged sword as the better the links the easier it is to complete business without an overnight stay.

Good quality, convenient and well priced hotel accommodation offering office facilities and support eg (meeting rooms, desks and telephone points in bedrooms, copying/xerox/fax/ e-mail etc).

Awareness of the needs of the business visitor (eg early breakfast/speedy check-out)

Late/easy booking and availability.

Ability to locate suitable/conveniently placed accommodation.

Corporate discounts

Branded hotels

Places to eat and entertain

How to reach and influence the market

The volume of business tourism is largely determined by the nature of the local business sector which is the main generator (which is why this market is generally termed non-discretionary). Although the absence of suitable accommodation may constrain the development of business tourism. The main opportunity lies with extending length of stay, and encouraging people to return as leisure visitors. Corporate rates, loyalty schemes and special offers can be a useful tool to encourage this and promote repeat visits.

A special area of the destination web-site devoted to business visitor needs may prove a useful short-cut to servicing business visitors' needs.

How the SW measures up

Difficult to assess as no research on what business visitors think. SW is probably less well provided for than some other regions such as London, NW and HoE where business tourism is more significant.

Key competitors

There is no real competition because this is largely non-discretionary tourism - in other words business visitors have to make the business trip to see a particular customer. Having said this, if the constraints and costs of travel become too high then that will erode the Region's ability to attract inward investment and retain businesses. Business facilities are thus an essential part of the economic infrastructure of the region.

A2 DISCRETIONARY BUSINESS TOURISM (MICE)

Market definition

UK residents staying away from home in the course of attending a conference, exhibition or as part of an incentive trip.

Market size and value

UK residents made 2.0m trips for conferences and exhibitions in 2001 comprising some 4.9m nights away from home and an associated spend of £420m. Conference and exhibition trips accounted for 10% of all business trips although the line between a conference and an informal meeting is blurred and these figures may underestimate the true impact of the MICE sector.

Importance to SW

Conferences and exhibitions (2001) accounted for an estimated 0.2m trips, 0.6m nights and a spend of £33m. (*These figures need to be treated with caution because of the small sample size)*.

The SW has a market share of around 10% of UK conference and exhibition tourism.

Conferences and exhibitions account for around 10% of all business tourism taking place in the Region, broadly in line with the national average.

Areas and sectors which benefit

Larger towns with municipal, university and hotel facilities capable of hosting major conferences and exhibitions.

Smaller meetings far outnumber larger meetings and primarily take place in hotels but attractions and sports facilities also benefit.

Areas which are readily accessible and close to major population and business centres will tend to do better although more remote areas can sometimes tap into team building and management training courses.

Market characteristics/profile

There is no hard information currently available to describe the market at the regional level and national level statistics are also quite limited in their scope. In general, this market is one of the highest spending segments of tourism and although small, is much sought after because it is relatively footloose. It tends to be seasonally spread with peaks in autumn and spring.

The market is usually split into the following sub-sectors - Meetings, incentive travel, conferences and exhibitions (MICE) - each of which have their own distinct characteristics.

- It is estimated that some 1.4m **conferences** took place in the UK in 2001 generating a total revenue of £7.3bn. However, most of these are day meetings and most are quite small (average size c50). The number of large events is quite limited. The vast majority of conference delegates are from the UK. Conferences are commonly segmented by type of organisation – national and international associations, corporate and public sector – which exhibit different characteristics and requirements.

- The **exhibition** sector is less well documented than conferences and is more constrained by the availability of facilities. The Exhibition Venues Association recorded 817 exhibitions (2000m2+) in 1999. Just over half were trade events and most (60%) were relatively modest in size (<5000m2). Exhibition visitors are high spenders and a significant spend is also generated by the exhibitors themselves.

- The **incentive travel** market is small in terms of volume but the highest yielding of all the MICE segments. The UK incentive market is equally split between Europe and the USA and consist of groups of employees or individuals associated with a company and generally accompanied by partners. There is frequently an associated conference.

Trends and prospects

Most analysts expect these segments to show further growth in the near future although this is not well substantiated. These activities are largely determined by the strength of the economy and general level of business activity. In recent years there has been a general trend for businesses to cut costs and seek better value for money. This is reflected in the move to shorter and more intensive conferences, smaller more specialised exhibitions and a greater tendency to introduce a work element into incentive trips. In all these sectors there is a growing demand for better quality experiences and intense competition from new destinations and venues both within the UK and abroad. Traditional destinations like resorts are losing out to purpose-built facilities in cities and universities.

A reasonable assumption is that the discretionary business tourism sector will grow in line with business tourism as a whole although this is partly dependent on the extent to which the region develops and maintains the necessary infrastructure and can increase its market share.

Forecasts carried out for this study project a growth in all business tourism trips of 39% 2001-2011 with a growth in real spend of 16%.

What the market wants

Location and accessibility are key to both the conference and exhibition sectors and good transport infrastructure is a must.

Larger conferences are seeking comfortable, modern meeting spaces with associated exhibition space, breakout rooms and catering provision. Smaller meetings have less sophisticated demands but still require adequate support in terms of equipment and catering.

Both the exhibition and conference sector need sufficient hotel accommodation close at hand and ideally a range of accommodation as delegate requirements vary. Nightlife, entertainment and restaurants add to the attraction of a conference/exhibition destination.

The incentive market is looking for unusual and special experiences in top quality, exclusive facilities.

Influencing and reaching the market

This market is discretionary and footloose within limits so it can be influenced with the right package and right message.

The key decision makers are not the people who attend the conference or exhibition but the people who organise the event. Marketing largely revolves around identifying and reaching these people through a variety of media such as direct mail, trade shows, web-sites, trade press and sales calls.

How the SW measures up

The SW has a number of resorts and cities which are active in this sector and for which it forms an important strand of tourism . These include places such as Bournemouth, Bristol, Bath, Cheltenham, Torquay, Plymouth.

In general the east of the region is better placed to capitalise on this market due to its accessibility to the population and business. However, hotels across most of the region will benefit to some extent from small local meetings.

The SW has some interesting and quality experiences which could be packaged for the incentive market. This is best done with some advice from specialists in this field and working through BTA.

Key competitors

Larger conference and exhibition venues in cities and resort towns throughout the UK. In terms of more locally generated business or regionally focused events then the SW is in direct competition with the surrounding regions of South Wales, Heart of England and South East.

For incentive trips the region is in competition with facilities all over the UK.

C7 DOMESTIC GROUP HOLIDAYS

Market definition

UK holiday makers travelling in organised groups, primarily by coach.

Market size and value

There are no figures for the size of the group holiday market as such in the UK, but if we assume that most group holidays in the UK take place by coach then this gives the following picture.

In 2001, there were 3m coach holidays in the UK, involving 12.5m nights and a spend of £740m. This amounts to 3% of all holiday tourism in the UK. A survey by MINTEL[1] in 1999 found that 10% of UK adults had been on an inclusive coach holiday in the UK in the past three years.

Importance to SW

In 2001, there were an estimated 0.72m coach holidays in the SW, involving some 3.2m nights away from home and a spend of £170m.

Coach holidays are a fairly small proportion of all holidays in the SW accounting for around 4% of all holiday trips.

The SW has a market share of 23% of UK coach holidays, and has a higher market share of the coach market than it does of holidays (17%) as a whole.

Areas and sectors which benefit

Seaside resorts are still popular, but historic towns and rural locations where there is suitable hotel accommodation can benefit.

Coach holidays are looking for good quality, large hotels of 3 and 4 star standard.

The large visitor attractions and other destinations that are set up to receive coaches will benefit from day excursions as part of the holiday package.

Market characteristics/profile

Coach holidays fall into two main groups:

- Inclusive tours and programmes offered by tour operators and coach companies. The market leaders in the UK are Shearings and Wallace Arnold, but most companies are small operations with a local or regional base.

- Holidays organised through clubs, work organisations and retirement clubs for the benefit of their members.

The majority of coach holidays are centred holidays as opposed to touring holidays (true tours only account for around 10% of the market).
The following picture is based on an analysis of UK data as regional data are not available. The regional picture may vary. Coach holidays are:

- Longer than the average holiday. Two thirds are classed as 4+ nights. Typically, coach holidays are 4/5 day or 7/8 day duration,

- Less seasonal than holidays as a whole and more likely to be taken in the shoulder periods than the summer peak. Coach holidays are on offer all year round.

- More likely to be bought as a package and involve tour operators or travel agents than holidays as a whole.

- Higher spend per trip and night than all holidays, because people are staying in hotels and there is no use of VFR.

- More likely to have a theme or focus than general holidays.

- The seaside accounts for over half of all coach holidays.

Coach holiday takers:

- Dominated by older people, with the over 55s showing a very much higher propensity to take coach holidays than other groups. Nearly half the market is aged 65+.

- Have a high proportion of DE groups which account for over a third of respondents.

- Very loyal with a high level of repeat business. It is not uncommon for coach enthusiasts to take several coach holidays a year.

Trends and prospects

An analysis of UKTS suggests that coach holidays have grown over the 1990s in line with domestic holidays as a whole and appear to be maintaining their market share.

A 20% increase in the core market of the 55-69 age group forecast over the next decade should help maintain volumes, although a key issue is the extent to which the upcoming generation will show the same enthusiasm for coach holidays as shown by their predecessors.

The nature of the coach holiday market has been changing in line with general holiday trends:

- A growth in shorter 4/5 day breaks at the expense of 7/8 day and 14 day holidays.

- A move away from traditional seaside resorts to inland destinations.

- A growth in themed and special interest tours.

- A demand for better quality accommodation and more luxurious coaches.

- A growing interest and demand for coach holidays abroad, particularly long haul and more exotic locations via fly/coach holidays.

We have assumed that coach holidays will maintain their market share of UK holidays and grow in line with our forecasts for holidays as a whole ie 32% increase in trips 2001-2011. This assumes the SW continues to hold its 2001 market share

What the market wants

- Value for money; this is a price sensitive market but quite discerning.
- To be treated as valued guests not singled out as a coach party and second class citizens.
- An opportunity to socialise and meet other people. Coach holidays commonly include evening entertainment.
- A sense of security, someone to look after the details and sort the luggage etc. But coach holiday takers don't want to be regimented and constrained.
- Good quality serviced accommodation, generally larger 3 or 4 star hotels, able to offer competitive rates. Ensuite rooms are a must.
- Interesting days out and excursions from the holiday base.

How to reach and influence the market

This market can be reached relatively easily and cost effectively through intermediaries such as tour operators, coach companies and group travel organisers. These are the decision makers who decide on programmes, destinations, itineraries etc although they are clearly influenced by an awareness of what their customers /members are looking for.

Useful routes to these people are via trade shows such as Excursions and BTTF, direct mail to databases and via specialist magazine such as Group Travel Organiser and Coach Monthly. The internet is also becoming increasingly important.

How the SW measures up

The SW has long been a favourite for coach holidays along with Scotland, Wales and the Lake District. It has an attractive mix of coast and countryside with plenty to interest the coach visitor. Icon attractions such as Eden help to put the region on the map and make it easier to sell the destination.

A survey of coach operators in 1997 (National Group Travel Report) found that the West Country was the region in the UK most likely to be promoted in their brochures.

Key competitors

Other traditional and picturesque destinations in the UK such as Wales, Scotland, Lakes and Yorkshire. Increasingly, this market is interested in destinations abroad, both in Europe and further afield with the advent of fly/coach holidays. The cruise market is also providing competition for this sector, especially as the cost of cruises comes down.

C4 BREAKS (1-6 nights)

Market definition

UK residents staying away from home on holidays and breaks of 1-6 nights. (This definition is based on the focus group research, which showed that people generally classed any holiday of less than a week as a break)

Market size and value

In 2001, this segment accounted for 84m (holiday) trips, comprising 221m nights away from home and an associated spend of £12bn.

This segment accounts for 83% of all UK holiday trips but a lower proportion of UK holiday nights (60%) and spend (71%).

Importance to SW

In 2001, this segment comprise 12.8m trips, 37m nights and a spend of £1.9bn in the SW region.

The SW has a market share of 15% of all UK breaks.

Overall, breaks (1-6 nights holidays) account for 76% of all holiday trips in the region, but a lower proportion of nights (52%) and spend (63%).

Areas and sectors which benefit

Potential for all parts of the Region to benefit. Relatively more important in Avon. Wiltshire and Gloucestershire than other parts and less so in Cornwall.

All types of location - urban, rural and coast - can benefit. Shorter breaks marginally more likely to take place in urban areas.

Hotels, guesthouses and B+Bs tend to be most favoured but significant use also made of self catering.

Market characteristics/profile

A very large segment comprising weekend breaks and longer mid-week and extended weekends. Now the mainstay of English leisure tourism and tourism in the SW. Breaks in the SW appeal to all lifecycle groups although different groups are looking for different things.

UKTS figures for the Region show the following:

- Low spend per trip but higher spend per night than average
- Average length of stay 2.9 nights
- 52% women
- 40% aged 25-44. 32% aged 55+. Higher propensity to attract younger people than holidays
- 64% married
- 90% have car in hh
- Two thirds don’t have children
- 60% are in work
- 62% are ABC1, 31% AB. Slightly more upmarket than holidays.
- 41% take place at seaside, 33% in urban areas, 26% countryside. Less emphasis on seaside than holidays.
- 25% originate from within SW, 45% from L , WM and SE. More restricted catchment than holidays.
- 31% holiday

- 55% are holidaying with other adults, 15% alone. More adult orientated than holidays.
- 66% come April-Oct, 24% JA. Less seasonal than holidays.

Trends and prospects

This segment has shown significant growth in the past and is likely to continue to do so in the future. The forecasts undertaken for this study suggest that 1-3 night holidays will grow by 58% in the period 2001-2006 with a 53% growth in real spend. 4-6 night holidays are also expected to increase in volume and value, although not at such a high rate. City breaks abroad are growing in popularity fuelled by developments such as the Channel Tunnel and the increasing availability of cheap flights. Despite this threat we think the potential for growth in this segment is very good.

This assumes the SW continues to hold its 2001 market share

What the market wants

Breaks are booked with short lead times and are often spontaneous. The offer and experience is often more important than the destination. People will take more risks with breaks because there is less to lose if it goes wrong or weather is bad. Serviced accommodation is generally preferred although there is increasing scope for self catering. Travel time is limited to 2/3 hours.

Pre-families are looking for lively places with nightlife, entertainment and style. Shopping, clubs and pubs, the opportunity to be with other people of the same age, are important. The focus is on resorts and urban places. Some couples are interested in romantic or pampering weekends.

Families are interested in things to amuse the children. Breaks are seen as an opportunity to escape the children or an opportunity for working parents to catch up on family bonding.

Post-families are interested in inclusive breaks, primarily in good quality hotel accommodation. Want to avoid children and families. Interested in food, gardens, walking, places to visit, shopping and general activity.

How to reach and influence the market

All groups are strongly motivated by cheap deals, bargains and special promotions. Getting a good deal is more important than the destination and many breaks are interchangeable. Internet is of growing importance in this area as is promotion of special offers to previous customers. Brands have strong influence.

How the SW measures up

Good range of places to visit and wide choice, although Cornwall is less likely to capitalise in this area, particularly for short 2/3 night breaks.

Key competitors

Cheap flights and city breaks abroad - why go to Bath when you can go to Barcelona?

Other Regions adjoining the SW such as London, Wales, Eastern.