
Salisbury Destination Benchmarking Visitor Survey 2004

Final Report

Prepared by Tourism South East Research Services on behalf of
Salisbury District Council

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TOURISM
SOUTH EAST

CONTENTS

		<u>Page</u>
1	INTRODUCTION	1
	1.1 Background	1
	1.2 Destination Benchmarking	1
	1.3 Objectives	3
	1.4 Methodology	3
	1.5 Statistical Reliability	4
	1.6 Presentation of Results	5
	1.7 Definitions	5
2	PROFILE OF VISITORS	6
	2.1 Visitor type	6
	2.2 Group size and composition	7
	2.3 Age and gender profile	8
	2.4 Socio-economic profile	9
3	ORIGIN OF VISITORS	10
	3.1 Place of residence (domestic & overseas visitors)	10
	3.2 Location of accommodation	13
	3.3 Accommodation used	14
4	CHARACTERISTICS OF VISIT	16
	4.1 Main purpose of visit	16
	4.2 Whether first ever visit	17
	4.3 Organised groups	17
	4.4 Length of stay	18
	4.5 Main mode of transport used	20
	4.6 Use of the Park & Ride scheme and town centre car parks	21
	4.7 Use of the Tourist Information Centre	21
	4.8 Whether visiting for a specific event	22
	4.9 How first became aware of Salisbury as a place to visit	23
	4.10 Whether visitors had seen adverts, leaflets or promotions for Salisbury	24
	5.1 All visitor spend – benchmarking comparisons	26
	5.2 Visitor spend by visitor type	27
	6.1 Introduction	29
	6.2 Overview of Salisbury’s opinion scores	29
	6.3 Accommodation	32
	6.4 Car parking	33
	6.5 Attractions and places to visit	35
	6.6 Places to eat and drink	37
	6.7 Shopping	39
	6.8 Ease of finding your way around	41
	6.9 Public toilets	43
	6.10 Parks, streets and open spaces	44
	6.11 General atmosphere and feeling of welcome	46
	6.12 Overcrowding & feeling of safety	47
	6.13 The Tourist Information Centre	49
	6.14 Overall enjoyment & likelihood of recommending	52
	6.15 Whether the visit met expectations	54
	6.16 Particular likes about Salisbury	55
	6.17 Anything that spoilt the visit	55
	6.18 Priority indicators (satisfaction versus importance of key indicators)	56

1. INTRODUCTION

1.1 BACKGROUND

This survey of visitors to Salisbury was commissioned by Salisbury District Council and undertaken by the Research Unit of Tourism South East between June and September 2004.

Similar surveys were undertaken in 2000, 2001 and 2002. As in previous years, 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; and, with the benefit of this data, help guide tourism related policies in the city.

1.2 DESTINATION BENCHMARKING

As for the survey in 2002 and previous years, a core output of this survey is the gathering of benchmarking data to measure visitor profile characteristics and visitor satisfaction on a range of indicators that comprise 'the visitor experience'. These include the cleanliness of streets and public toilets, provision and cost of car parking, quality of local restaurants and the friendliness of local people. Indicator scores for similar types of destination across the country are then compared to measure relative performance and identify best practice.

The overall benefit of benchmarking is that it provides a customer-focused basis on which to set priorities for action and improve the destination 'product'. Uses include:

- Identifying strengths and weaknesses, since under-performance against key competitors can be a powerful influence on decision-makers
- Securing additional resources for visitor management projects, often by identifying needs which can be met by funding from the budgets of other Council departments
- Raising the profile of the visitor management function within the Council and helping to secure political support for improvements to the town
- Influencing product suppliers and the private sector to improve, acting as a driver for Council initiatives aimed at improving standards
- Generating positive PR from benchmarking findings, playing a positive role in building civic pride
- Helping to identify best practice amongst a range of destinations which can be shared
- Demonstrating achievement through year on year improvements against baseline data to measure the impact of capital expenditure on physical products and campaigns

The benchmarking scheme is co-ordinated and delivered by the Regional Tourist Boards. This ensures that a standardised methodology is adhered to, and thus survey data is comparable. The standard factors used to ensure quality and consistency include:

- Face to face interviewing surveys using trained interviewers over a core period of June/July to September, carried out among non-residents
- Sampling using 400 or more interviews at locations and times which reflect visitor usage
- Standard core questionnaire
- Reporting the benchmarked data to a standard format, providing destinations with their own scores, together with best ('max') and average scores for their comparable type of destination – in this case, historic towns.

Results relating to individual destinations are issued on a confidential basis only.

A central database holds all the profile and scoring data for individual destinations, and is used to collate overall averages for each destination type. Visitor opinion scores have been aggregated into a **three-year rolling average** (combining the years 2002, 2003 and 2004) to provide the fullest possible comparisons for each type of destination. Rolling averages also have the benefit of smoothing out random, year-to-year fluctuations and enable clearer observation of trends.

Participating destinations 2002-2004: *(excluding Market Towns)*

Historic Towns

Arundel
Bath
Colchester
Chester
Chesterfield
Durham
Guildford
Lichfield
Lincoln
Oxford
Rochester
Salisbury
Tamworth
Winchester
Windsor
Worcester

Cities/Towns

Birmingham
Bristol
Derby
Hull
Liverpool
Manchester
Newcastle & Gateshead
Peterborough
Plymouth
Portsmouth
Rochdale
Salford
Southampton

Resorts

Blackpool
Bognor Regis
Broadstairs
Burnham on Sea
Cleethorpes
Cornish Riviera
Falmouth
Great Yarmouth
Margate
Morecombe
Newquay
St Ives
Southend
Southport
Southshields
Torbay
Weston Super Mare

NB: Market towns are not included in the 'All Destinations' averages.

Since 2002, 16 historic towns throughout England have participated in destination benchmarking.

1.3 OBJECTIVES

The objectives of the 2004 Visitor Survey were as follows:

- i) To provide basic data on the profile, origin, behaviour, use of facilities and opinions of visitors to Salisbury to help improve understanding of tourism within the city.
- ii) To ensure that marketing campaigns are properly focused and allow their effectiveness to be monitored.
- iii) To identify the main reasons why visitors come to Salisbury and their particular likes and dislikes.
- iv) Where possible, to allow emerging trends to be identified so that more informed decisions can be made in relation to future marketing and visitor provision in the city.

1.4 METHODOLOGY

In order to meet the above objectives a face to face questionnaire survey was carried out by experienced Tourist Board interviewers over 33 interviewing sessions between 15th June and 19th September 2004. Adults were sampled on a random basis at five key locations in the city centre:

- Market Place
- Fish Row, close to the TIC
- Poultry Cross
- Cathedral Close
- High Street pedestrian precinct, between the main shopping area and the Cathedral.

In order to ensure consistency with the definition of a 'visitor', a filtering process was used to exclude certain types of people from the survey namely:

- Residents of Salisbury and the immediate surrounding area (10 mile radius)
- Non-residents on day visits to Salisbury for non-leisure purposes – e.g. trips concerned with their normal work, study or household shopping.
- 'Other' visitor types

Because satisfaction surveys rely on visitors having used or experienced a particular service or facility, interviewing was not conducted before 11am, and only those who were at least half way through their visit were interviewed.

A total of 1185 people were stopped to be interviewed, of whom 24% were 'local residents' (i.e. living within a 10 mile radius of Salisbury City Centre) and therefore not eligible to be interviewed. A further 24% declined to participate in the survey

1% were non-residents on a regular or household shopping trip, working or studying in Salisbury or did not fit the target profile for the survey.

Of those approached, therefore, 599 (51%) were target profile 'visitors' who agreed to take part and were eligible to complete the main questionnaire.

Overall, 43% of all visitor interviews were gained in the city centre shopping areas including Market Place, Poultry Cross and the High Street pedestrian precinct. 29% were obtained near the TIC in Fish Row and the remaining 27% were obtained in Cathedral Close and the approaches to Salisbury Cathedral.

Table (i): Sample by interview location

Location	Sample (%)
Market Place	99 (17%)
Fish Row	176 (29%)
Poultry Cross	18 (3%)
Cathedral Close	164 (27%)
High Street (pedestrian precinct)	142 (24%)
Total	599 (100%)

It is acknowledged that on-site visitor surveys of this type are liable to under-represent certain sectors of the visitor market, including touring coach parties and staying business visitors. Overseas visitors are also likely to be under-represented, since interviews were conducted in English and therefore tend to exclude non-English speakers.

1.5 STATISTICAL RELIABILITY

All sample surveys are subject to statistical error that varies with the sample size. Table (ii) shows the respective sample achieved for each visitor type and gives the margins within which one can be 95% certain that the true figures will lie (assuming the sample is random).

Table (ii): Margins of error (%) at 95% confidence interval

At 95% confidence interval		10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
	Sample	+/-	+/-	+/-	+/-	+/-
Day visitors from home	213	4.0	5.4	6.2	6.6	6.7
Day visitors on holiday	229	3.9	5.2	5.9	6.3	6.5
Staying visitors	157	4.7	6.3	7.2	7.7	7.8
All visitors	599	2.4	3.2	3.7	3.9	4.0

This means, for example, we can be 95% certain that, if 50% of the overall sample are found to have a particular characteristic or view, there is an estimated 95% chance that the true population percentage lies in the range of +/- 4%, i.e. between 46% and 54%.

1.6 PRESENTATION OF RESULTS

Key findings are presented under the following headings:

- Profile of visitors
- Origin of visitors
- Characteristics of visit
- Visitor expenditure
- Visitor opinions

Key findings generally refer to all visitors, although commentary is provided where there is a significant difference between visitor types (e.g. day and staying visitors).

1.7 DEFINITIONS

For the purposes of this report, visitors to Salisbury are divided into three main types:

'Day visitors from home' - visitors who had travelled from, and were returning to, homes outside the Salisbury area on the day of their visit.

'Day visitors on holiday' - visitors travelling to Salisbury for the day while staying away from home or en route to other locations, and who were not staying overnight in Salisbury.

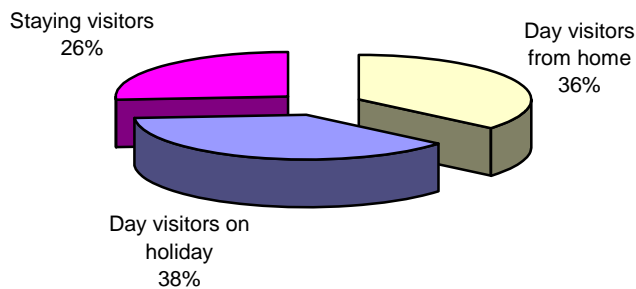
'Staying visitors' - visitors staying overnight for at least one night in accommodation within Salisbury City Centre. This includes those staying with friends or relatives, as well as those staying in commercial serviced or non-serviced accommodation.

2. PROFILE OF VISITORS

2.1 VISITOR TYPE

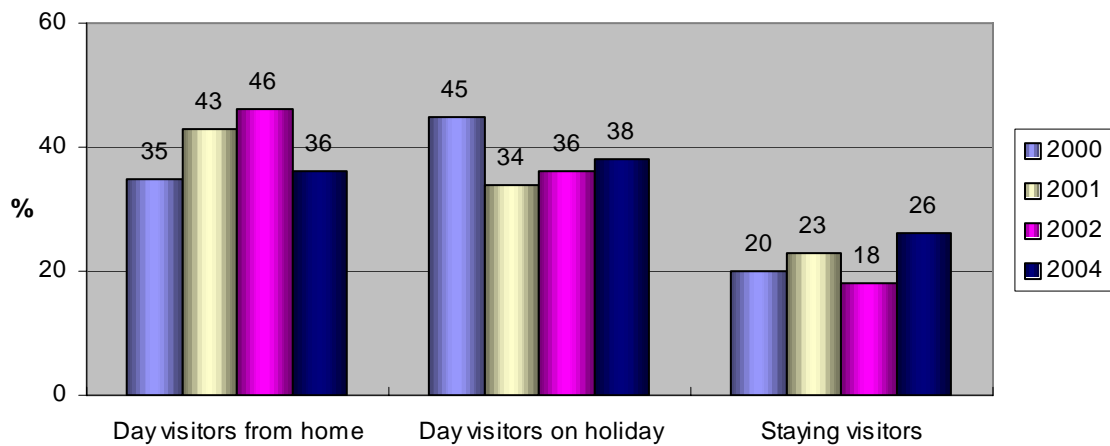
Of the 599 visitors interviewed, 74% were day visitors. The majority of these (36% of all visitors) were day visitors from home, while 38% were day visitors from holiday bases outside Salisbury. The remaining 26% of all visitors were staying overnight in commercial or non-commercial accommodation within Salisbury.

Figure 1: Visitor Type



Overall, a higher proportion of visitors interviewed in Salisbury were staying overnight in the city in 2004 compared with previous survey years (Figure 2).

Figure 2: Trends in visitor type 2000-2004



The proportion of day and staying visitors encountered in 2004 is broadly comparable with the average for the 'all historic towns' benchmarking group. The aggregated results suggest that around 77% of all visitors to historic towns are visiting for the day and only 23% of visitors are spending one night or more within that location. For 'all destinations', an average of 67% of all visitors were visiting for the day, and 33% were staying overnight within the destination.

2.2 GROUP SIZE & COMPOSITION

88% of all visitor groups contained adults only, while 12% included one or more children. The equivalent proportions in 2002 were 82% and 18% respectively.

Table 1: Group composition

	Day visitors from home	Day visitors on holiday	Staying visitors	All Visitors 2004	All Visitors 2002	All Visitors 2001	All Visitors 2000
Base:	213	228	157	598			
<u>Adults Only</u>							
One adult	33%	20%	26%	26%	17%	16%	17%
Two adults	44%	56%	54%	51%	56%	62%	57%
Three or more adults	12%	12%	7%	11%	9%	12%	12%
<i>Sub total</i>	89%	88%	87%	88%	82%	90%	85%
<u>Adults & children</u>							
One adult with one or more child(ren)	2%	3%	4%	3%	2%	1%	2%
Two adults with one or more child(ren)	7%	6%	8%	7%	12%	7%	9%
Three or more adults with one or more child(ren)	3%	4%	1%	3%	3%	3%	4%
<i>Sub total</i>	11%	12%	13%	12%	18%	10%	15%
Total	100%	100%	100%	100%	100%	100%	100%

Overall, of the 1,289 individuals represented in the 599 visitor groups interviewed, 90% were adults and the remaining 10% were children (under 16 years of age).

The average size of all groups surveyed was 2.15 people (1.94 adults and 0.21 children). This compares with 2.23 people in 2002, 2.22 in 2001 and 2.44 in 2000. The average group size among the 'all historic towns' benchmarking group was slightly larger at 2.30 people.

Table 2: Average group size - by visitor type (2004)

	Average number of people per group		
	Adults	Children	Total People
Day visitors from home	1.89	0.19	2.08
Day visitors on holiday	2.07	0.26	2.33
Staying visitors	1.83	0.18	2.01
All visitors to Salisbury 2004	1.94	0.21	2.15
All Historic Towns (average)	2.00	0.38	2.30
All destinations (average)	2.08	0.47	2.50

2.3 AGE & GENDER PROFILE

Overall, visitors were relatively evenly distributed between the age categories, but with the highest proportions of visitors falling into the 45-54 and 55-64 age categories (17% and 19% respectively).

Table 3: Age & gender profile

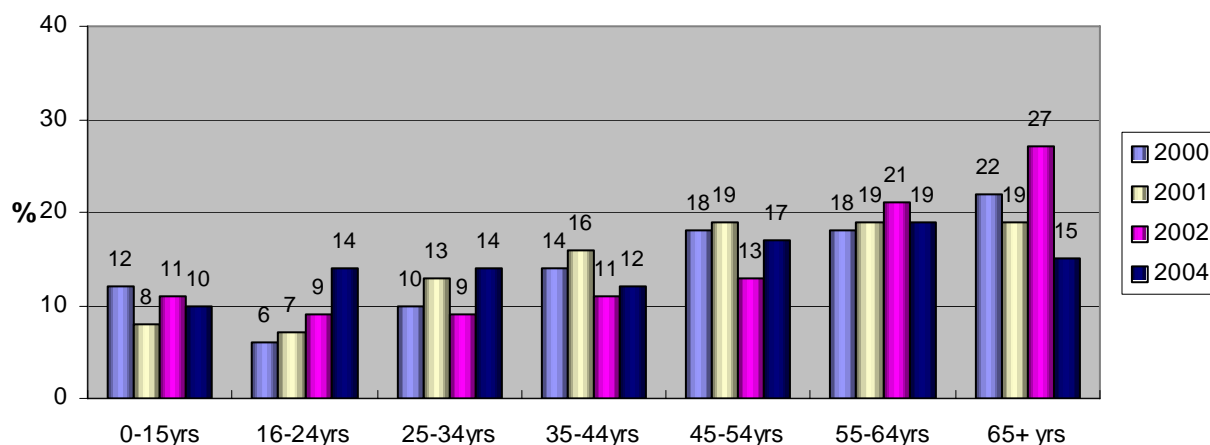
	Day visitors from home	Day visitors on holiday	Staying visitors	All visitors 2004	All visitors 2002	All visitors 2001	All visitors 2000
0-15 yrs	9%	11%	9%	10%	11%	8%	12%
16-24 yrs	14%	14%	14%	14%	9%	7%	6%
25-34 yrs	13%	13%	16%	14%	9%	13%	10%
35-44 yrs	11%	12%	12%	12%	11%	16%	14%
45-54 yrs	16%	17%	18%	17%	13%	19%	18%
55-64 yrs	18%	18%	21%	19%	21%	19%	18%
65-74 yrs	12%	10%	9%	10%	27%*	19%*	22%*
75+ yrs	6%	5%	2%	5%			
Males	49%	49%	47%	48%			
Females	51%	51%	53%	52%			

* all visitors aged 65+ in 2002, 2001 & 2000

Relatively few visitors fell into the 65+ age category compared with previous survey years (15% in 2004 compared with 27% in 2002, 19% in 2001 and 22% in 2000). Visitors aged 16-24 and 25-34 however, showed a small increase compared with previous surveys (Figure 3).

The gender profile was fairly evenly balanced in 2004, with females slightly better represented than males within visitor groups (52% and 48% respectively).

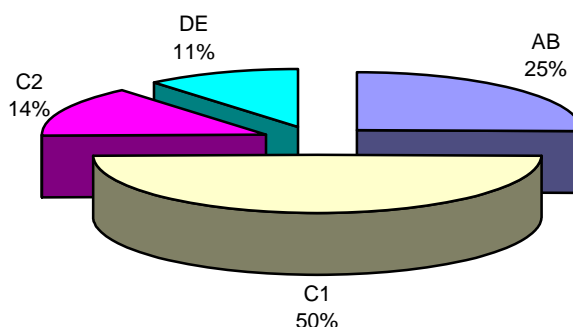
Figure 3: Trends in visitor age profiles 2000-2004



2.4 SOCIO-ECONOMIC PROFILE

Based on the occupation of their household's highest earner, 25% of all visitors to Salisbury fell into the affluent 'AB' socio-economic group (higher and intermediate managerial or professional occupations). A further 49% were 'C1s' (clerical or supervisory and all other 'white collar' occupations).

Figure 4: Socio-economic profile - all visitors 2004



Only 14% of all visitors fell into the skilled manual worker category (C2), and only 11% were in the lowest 'DE' group.

As shown in Table 4 below, the proportion of 'AB's was comparable with 2002, but lower than in 2001 and 2000. There was a significant increase, however, in the proportion of 'C1's (49% in 2004 compared with 27% in 2001 and 2002). As a result, the proportion of 'C2's and 'DE's was well below the average from previous survey years.

Table 4: Socio economic profile

	Salisbury (All visitors 2004)	Salisbury (All visitors 2002)	Salisbury (All visitors 2001)	Salisbury (All visitors 2000)	UK residents taking Holiday trips in England 2003 ¹	All Historic Towns	All Destinations
	%	%	%	%	%	Average %	Average %
AB	25	24	32	40	35	33	25
C1	49	27	27	21	33	36	32
C2	14	20	22	22	18	17	22
DE	11	27	19	14	15	13	21
Total	100	100	100	100	100	100	100

Overall, Salisbury had a slightly higher proportion of 'ABC1' category visitors than the benchmarked average for 'all historic towns' (74% compared with 69%), but a relatively low proportion of these fell into the most affluent 'AB' socio-economic classification (25% compared with 33% for 'historic towns').

¹ United Kingdom Tourism Survey 2003 (published by VisitBritain)

3. ORIGIN OF VISITORS

3.1 PLACE OF RESIDENCE

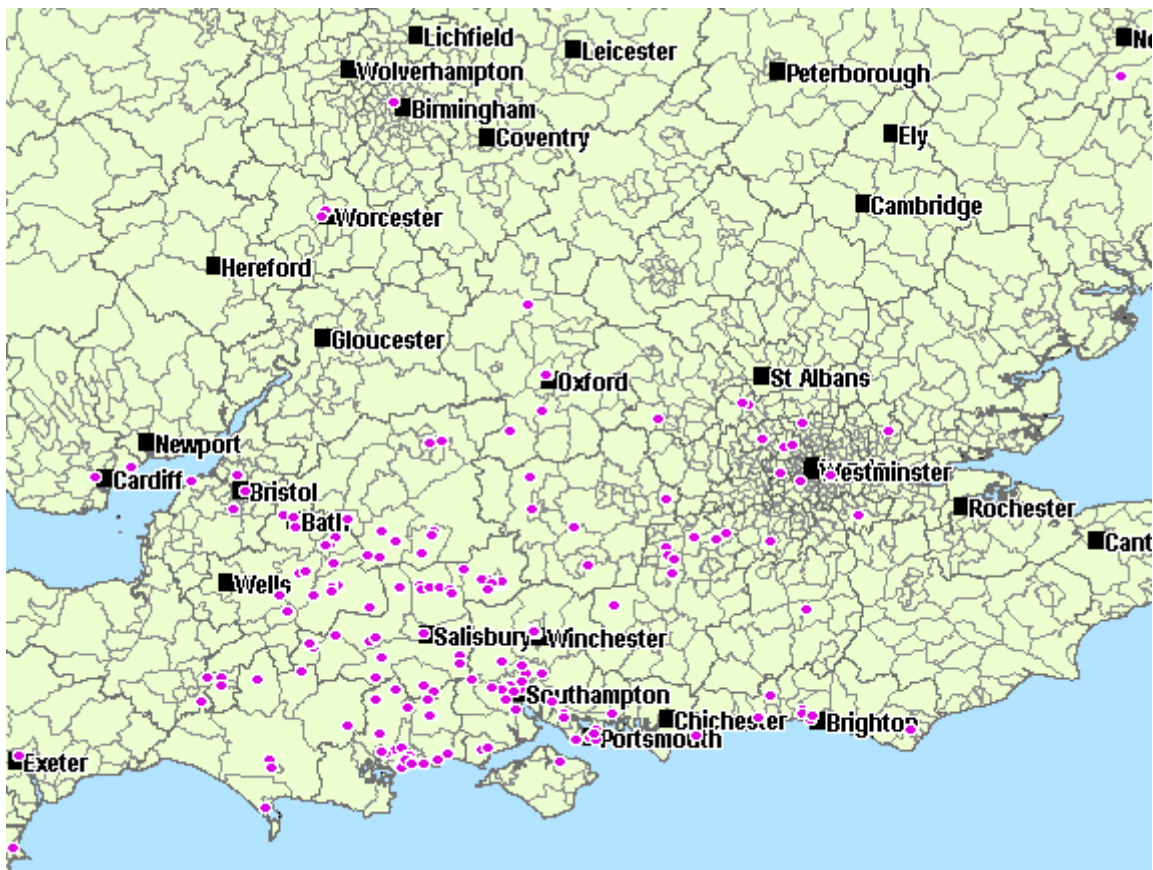
Tables 5 and 6 show the origin of day and staying visitors by county and country of origin.

3.1.1 Domestic Visitors

The highest proportion of day visitors from home were from home locations within Hampshire (28%). A further 22% were residents of towns or villages elsewhere in Wiltshire². Smaller proportions were from the neighbouring counties of Dorset (18%) and Somerset (9%), or from the greater London area (5%).

A few day visitors had travelled from much further afield. These included visitors from Surrey, Oxfordshire, Devon and East Sussex.

Figure 5: Map plotting postcodes of day visitors from home



² Excludes those living within approximately 10 miles of Salisbury who were filtered out of the survey at Q1.

Table 5: Place of Residence - by County, Region or Country (UK visitors)

	Base	Visitor Type		
	All visitors	Day visitors from home	Day visitors on holiday	Staying visitors
Base	599	213	229	157
Hampshire	64 (11%)	60 (28%)	4 (2%)	-
Wiltshire	48 (8%)	46 (22%)	-	2 (1%)
Dorset	48 (8%)	39 (18%)	5 (2%)	4 (3%)
Greater London	34 (6%)	10 (5%)	15 (7%)	9 (6%)
Somerset (including Bristol)	25 (4%)	19 (9%)	2 (1%)	4 (3%)
Surrey	12 (2%)	7 (3%)	2 (1%)	3 (2%)
West Midlands	11 (2%)	1 (<0.5%)	6 (3%)	4 (3%)
Devon	10 (2%)	3 (1%)	6 (3%)	1 (1%)
East Sussex	10 (2%)	3 (1%)	2 (1%)	5 (3%)
Kent	10 (2%)	1 (<0.5%)	6 (3%)	3 (2%)
Berkshire	9 (2%)	6 (3%)	2 (1%)	1 (1%)
Essex	9 (2%)	-	6 (3%)	3 (2%)
West Sussex	8 (1%)	3 (1%)	3 (1%)	2 (1%)
Hertfordshire	7 (1%)	2 (1%)	2 (1%)	3 (2%)
Nottinghamshire	7 (1%)	-	3 (1%)	4 (3%)
Wales - South	7 (1%)	2 (1%)	3 (1%)	2 (1%)
Derbyshire	5 (1%)	-	2 (1%)	3 (2%)
Oxfordshire	5 (1%)	5 (2%)	-	-
Scotland	5 (1%)	-	1 (<0.5%)	4 (3%)
Buckinghamshire	4 (1%)	1 (<0.5%)	1 (<0.5%)	2 (1%)
Cambridgeshire	4 (1%)	-	1 (<0.5%)	3 (2%)
Cheshire	4 (1%)	-	1 (<0.5%)	3 (2%)
Lancashire	4 (1%)	-	4 (2%)	-
Norfolk	4 (1%)	-	2 (1%)	2 (1%)
Wales - North	4 (1%)	-	4 (2%)	-
Yorkshire - West	4 (1%)	-	2 (1%)	2 (1%)
Cornwall (and Scilly Isles)	3 (1%)	-	-	3 (2%)
Gloucestershire	3 (1%)	-	1 (<0.5%)	2 (1%)
Greater Manchester	3 (1%)	-	1 (<0.5%)	2 (1%)
Lincolnshire	3 (1%)	-	2 (1%)	1 (1%)
Merseyside	3 (1%)	-	2 (1%)	1 (1%)
Durham	2 (<0.5%)	-	2 (1%)	-
Isle of Wight	2 (<0.5%)	1 (<0.5%)	1 (<0.5%)	-
Leicestershire	2 (<0.5%)	1 (<0.5%)	1 (<0.5%)	-
Northamptonshire	2 (<0.5%)	-	2 (1%)	-
Shropshire	2 (<0.5%)	1 (<0.5%)	1 (<0.5%)	-
Staffordshire	2 (<0.5%)	-	2 (1%)	-
Tyne & Wear	2 (<0.5%)	-	1 (<0.5%)	1 (1%)
Worcestershire	2 (<0.5%)	2 (1%)	-	-
Northern Ireland	2 (<0.5%)	-	1 (<0.5%)	1 (1%)
Bedfordshire	1 (<0.5%)	-	1 (<0.5%)	-
Channel Islands	1 (<0.5%)	-	1 (<0.5%)	-
Cumbria	1 (<0.5%)	-	1 (<0.5%)	-
Herefordshire	1 (<0.5%)	-	-	1 (1%)
Suffolk	1 (<0.5%)	-	1 (<0.5%)	-
Wales – Mid	1 (<0.5%)	-	1 (<0.5%)	-
Yorkshire - East	1 (<0.5%)	-	1 (<0.5%)	-
Total Domestic Visitors	402 (67%)	213 (100%)	108 (47%)	81 (52%)

The home locations of domestic day visitors from holiday accommodation outside Salisbury and staying visitors were found to be more widely spread throughout the UK.

3.1.2 Overseas Visitors

197 visitors interviewed during the survey period were from overseas (33% of all visitors). This compares with 16% during 2002, 19% during 2001 and 21% during 2000.

Of the overseas visitors encountered in Salisbury during the 2004 survey, 39% were staying overnight in Salisbury and 61% were day visitors from holiday accommodation bases outside Salisbury.

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

Table 6: Overseas Visitors Place of Residence - by Country

Base	Base	Visitor Type		
	All visitors	Day visitors from home	Day visitors on holiday	Staying visitors
	599	214	228	157
U.S.A.	29 (5%)	-	17 (8%)	12 (8%)
Germany	28 (5%)	-	21 (9%)	7 (5%)
Australia	19 (3%)	-	13 (6%)	6 (4%)
Italy	17 (3%)	-	8 (4%)	9 (6%)
France	12 (2%)	-	8 (4%)	4 (3%)
New Zealand	9 (2%)	-	6 (3%)	3 (2%)
Canada	8 (1%)	-	3 (1%)	5 (3%)
Spain	8 (1%)	-	4 (2%)	4 (3%)
Austria	7 (1%)	-	5 (2%)	2 (1%)
Netherlands	7 (1%)	-	3 (1%)	4 (3%)
Switzerland	5 (1%)	-	4 (2%)	1 (1%)
Poland	5 (1%)	-	4 (2%)	1 (1%)
South Africa	5 (1%)	-	3 (1%)	2 (1%)
Japan	5 (1%)	-	2 (1%)	3 (2%)
Republic of Ireland	4 (1%)	-	2 (1%)	2 (1%)
Russia	3 (0.5%)	-	1 (<0.5%)	2 (1%)
Denmark	2 (<0.5%)	-	1 (<0.5%)	1 (1%)
Norway	2 (<0.5%)	-	-	2 (1%)
Sweden	2 (<0.5%)	-	1 (<0.5%)	1 (1%)
Venezuela	2 (<0.5%)	-	1 (<0.5%)	1 (1%)
Hong Kong	2 (<0.5%)	-	2 (1%)	-
China	2 (<0.5%)	-	2 (1%)	-
Singapore/Indonesia	2 (<0.5%)	-	-	2 (1%)
India	1 (<0.5%)	-	-	1 (1%)
Belgium	1 (<0.5%)	-	-	1 (1%)
Luxembourg	1 (<0.5%)	-	1 (<0.5%)	-
Cyprus	1 (<0.5%)	-	1 (<0.5%)	-
Hungary	1 (<0.5%)	-	1 (<0.5%)	-
Slovakia	1 (<0.5%)	-	1 (<0.5%)	-
Brazil	1 (<0.5%)	-	1 (<0.5%)	-
Ecuador	1 (<0.5%)	-	1 (<0.5%)	-
Chile	1 (<0.5%)	-	1 (<0.5%)	-
Mexico	1 (<0.5%)	-	1 (<0.5%)	-
Korea	1 (<0.5%)	-	1 (<0.5%)	-
Ukraine	1 (<0.5%)	-	1 (<0.5%)	-
Total overseas visitors	197 (33%)	0 (0%)	121 (53%)	76 (48%)

3.2. LOCATION OF ACCOMMODATION – DAY VISITORS ON HOLIDAY

Of the 121 day visitors on holiday who were staying away from home in accommodation bases outside Salisbury, the greatest proportion, (28%), were staying elsewhere within Wiltshire. A further 23% were staying in Hampshire, 21% in Dorset and 11% in the Greater London area.

Table 7: Location of accommodation – day visitors on holiday

Location of holiday accommodation		
Base	121	
<i>Coombe Bissett</i>	5	
<i>Warminster</i>	5	
<i>Swindon</i>	3	
<i>Wilton</i>	3	
<i>Amesbury</i>	2	
<i>Other towns & villages in Wiltshire</i>	43	
Wiltshire (total)	61	28%
<i>Southampton</i>	7	
<i>Fordingbridge</i>	5	
<i>Other New Forest towns & villages</i>	13	
<i>Winchester</i>	4	
<i>Andover</i>	3	
<i>Other towns & villages in Hampshire</i>	17	
Hampshire (total)	49	23%
<i>Bournemouth</i>	28	
<i>Other towns & villages in Dorset</i>	17	
Dorset (total)	45	21%
Greater London	24	11%
Somerset (including Bristol)	12	6%
Devon	6	3%
East Sussex	4	2%
Berkshire	3	1%
Gloucestershire.	3	1%
Surrey	3	1%
Cornwall (and Scilly Isles)	2	1%
Wales - South	2	1%
Isle of Wight	1	1%
Oxfordshire	1	1%
Staffordshire	1	1%
West Sussex	1	1%

3.3. ACCOMMODATION USED BY STAYING VISITORS AND DAY VISITORS ON HOLIDAY

3.3.1 Staying Visitors

Of the 157 staying visitors interviewed, 47% were staying in serviced accommodation within Salisbury (15% in hotels, 29% in B&Bs or guest houses and 4% in pubs or inns). This compares with 46% in 2002 and an average of 41% for 'all historic towns'.

A further 21% were staying in the homes of friends and relatives. Again, this is comparable with findings from the 2002 survey (24%), but was relatively low compared with the average for 'all historic towns' (37%) and 'all destinations' (30%).

A relatively high proportion of visitors were camping (10%) compared with the average for other historic towns, however, this is likely to reflect the varying nature of the accommodation stock within the participating destinations. The Youth Hostel in Salisbury was used by a relatively high proportion of visitors (10%), particularly by visitors from overseas.

Visitors mentioning 'other' types of accommodation used were all staying with host families.

Table 8: Type of accommodation used – staying visitors

	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Hotel	26%	23 (15%)	25%	30%
B&B/guest house	18%	45 (29%)	14%	12%
Pub/ inn	2%	6 (4%)	2%	1%
Home of friends/relatives	24%	33 (21%)	37%	30%
Rented s/c cottage/flat/house	3%	3 (2%)	3%	5%
Touring caravan	9%	3 (2%)	2%	4%
Camping	4%	16 (10%)	2%	2%
Own static caravan	2%	-	1%	2%
Language school	2%	1 (1%)	1%	<0.5%
Youth hostel	7%	15 (10%)	3%	2%
University accommodation	0%	1 (1%)	6%	3%
Other	4%	11 (7%)	4%	10%
Total	100%	157 (100%)	100%	100%

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.

3.3.2 Day visitors on holiday

40% of those staying in holiday accommodation outside Salisbury were staying in serviced accommodation. A further 31% were staying in the home of friends or relatives.

Smaller proportions of visitors were staying in touring caravans or tents (10%), rented self-catering accommodation (6%), university accommodation (3%) or youth hostels (2%).

Accommodation with a host family again accounted for the majority of 'other' accommodation types used, but other mentions included a military camp and house exchange.

Table 9: Type of accommodation used – day visitors from holiday accommodation outside Salisbury

	Salisbury 2004
Home of friends/relatives	72 (31%)
Hotel	53 (23%)
B&B/guest house	32 (14%)
Pub/ inn	6 (3%)
Rented self-catering cottage/flat/house	13 (6%)
Camping	13 (6%)
Touring caravan	9 (4%)
Youth Hostel	4 (2%)
Static caravan - rented	2 (1%)
Boat/ Yacht/ Narrowboat	1 (<0.5%)
Second home	1 (<0.5%)
Holiday Centre/ Village	1 (<0.5%)
Language school	1 (<0.5%)
University accommodation	7 (3%)
Other	14 (6%)
Total	229 (100%)

4. CHARACTERISTICS OF VISIT

4.1 MAIN PURPOSE OF VISIT TO SALISBURY

All visitors were asked about the main purpose of their visit to Salisbury on the day they were interviewed. The majority of visitors described their visit as a holiday or leisure based visit (74% of all visitors). This is broadly comparable with previous surveys (79%, 72% and 74% respectively in 2002, 2001 and 2000). As in previous years, the proportion of visitors on leisure or holiday visits to Salisbury was relatively high compared with the average for 'historic towns' (67%).

10% of all visitors were visiting friends or relatives, including 19% of all staying visitors. This is lower than the average for 'all historic towns' (14%) but remains comparable with previous surveys (7% of all visitors in 2002, 11% of all visitors in 2001 and 2000).

9% of all visitors were on special (non-regular) shopping trips, comparable with 2002 and 2000 (both 11%), but slightly lower than in 2001 (15%). The average for 'all historic towns' was 13%. 26% of all day visitors from home in 2004 were visiting for special shopping trips.

Table 10: Purpose of visit – visitors to Salisbury & benchmark comparisons

	Salisbury 2004				All Historic Towns	All Destinations
	Day visitors from home	Day visitors on holiday	Staying visitors	All visitors		
Leisure/holiday	131 (62%)	200 (87%)	110 (70%)	441 (74%)	67%	75%
VFR	11 (5%)	19 (8%)	29 (19%)	59 (10%)	14%	11%
Special shopping trip	55 (26%)	1 (0.4%)	-	56 (9%)	13%	10%
Business trip	16 (7%)	4 (2%)	10 (6%)	30 (5%)	4%	3%
Language student	-	5 (2%)	8 (5%)	13 (2%)	1%	1%
Total	213 (100%)	229 (100%)	157 (100%)	599 (100%)	100%	100%

Business/conference visitors continue to account for a small but significant proportion of visitors encountered within Salisbury, particularly as day visitors. Language students accounted for only 2% of all staying visitors in 2004, but this was consistent with previous surveys. Both these types of visitor tend to be under-represented in surveys of this type due to the timing and location of on-street survey sessions.

Table 10a: 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%

4.2 WHETHER FIRST EVER VISIT

45% of all visitors interviewed were visiting Salisbury for the first time, while the remaining 55% had visited the city on least one occasion previously. Staying visitors (50%) and day visitors on holiday (64%) were more likely to be on their first visit to Salisbury compared with 21% of day visitors from home.

Table 11: Whether first ever visit

	Day visitors from home	Day visitors on holiday	Staying visitors	All visitors 2004	All visitors 2002	All Historic Towns	All destinations
First ever visit	45 (21%)	146 (64%)	79 (50%)	271 (45%)	32%	33%	26%
Repeat visit	168 (79%)	83 (36%)	78 (50%)	328 (55%)	68%	67%	74%

Overall, the proportion of *repeat* visitors was below the average for 'all historic towns' and 'all destinations' (67% and 74% respectively), and was relatively low compared with the 2002 survey (68%).

4.3 ORGANISED GROUPS

Respondents were asked whether they were part of an organised group or coach party. Almost all of those surveyed (91%) were visiting Salisbury independently, with just 9% reporting that their visit was part of an organised tour. The majority of those who were visiting as part of a group or tour were visiting Salisbury for the day only (91%).

As shown in Table 12 below, the proportion of organised group visitors encountered in Salisbury in the 2004 survey was consistent with average results for 'historic towns' and 'all destinations'.

Table 12: Whether part of an organised group or tour

	Salisbury 2000	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Organised group visitors	17%	14%	12%	9%	9%	10%
Independent visitors	83%	86%	88%	91%	91%	90%

4.4 LENGTH OF STAY IN SALISBURY

4.4.1 Staying visitors

When asked how many nights they were staying in Salisbury, respondents answers ranged between 1 and 120 nights, resulting in an average length of stay of 3.99 nights. The sample includes two language students (staying for 2 months and 6 months) and other visitors from overseas staying for up to 4 weeks. Average lengths of stay for domestic and overseas staying visitors are shown in Table 13a, below.

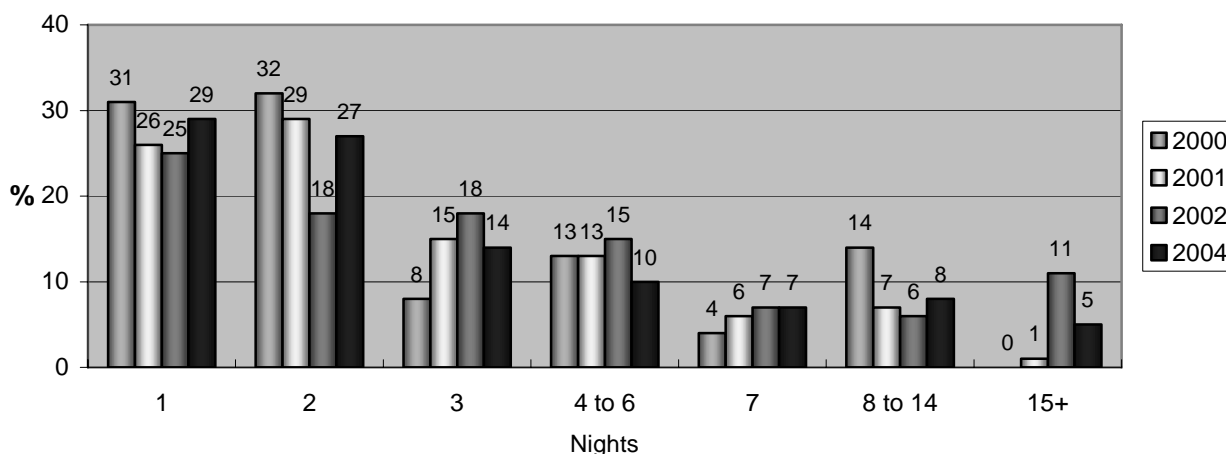
Table 13a: Average length of stay (nights) – all staying visitors (by domestic/overseas)

Average length of stay (nights)	Salisbury 2000	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations	UKTS/IPS national averages ³
Domestic staying visits (nights)			3.47			3.1
Overseas staying visits (nights)			6.90			8.2
All staying visits (nights)	3.9	5.3	3.99	5.98	6.21	

The average length of stay in Salisbury was lower than the average for ‘all historic towns’ (5.98 nights) and ‘all destinations’ (6.21 nights). The 2004 results were also relatively low compared with the 2002 survey (average 5.3 nights), but were consistent with the findings from previous years (3.4 nights in 2001 and 3.9 nights in 2000).

Results from the United Kingdom Tourism Survey (2003) indicate that the national average for a domestic holiday trip in the UK is 3.1 nights, while International Passenger Survey figures (2003) indicate that the average length of stay for overseas visitors to the UK is 8.2 nights.

Figure 6: Length of stay (nights) in Salisbury 2000-2004



As shown in Figure 6, 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%).

³ United Kingdom Tourism Survey 2003 & International Passenger Survey 2003 (published by VisitBritain)

4.4.2 Day visitors from home and on holiday

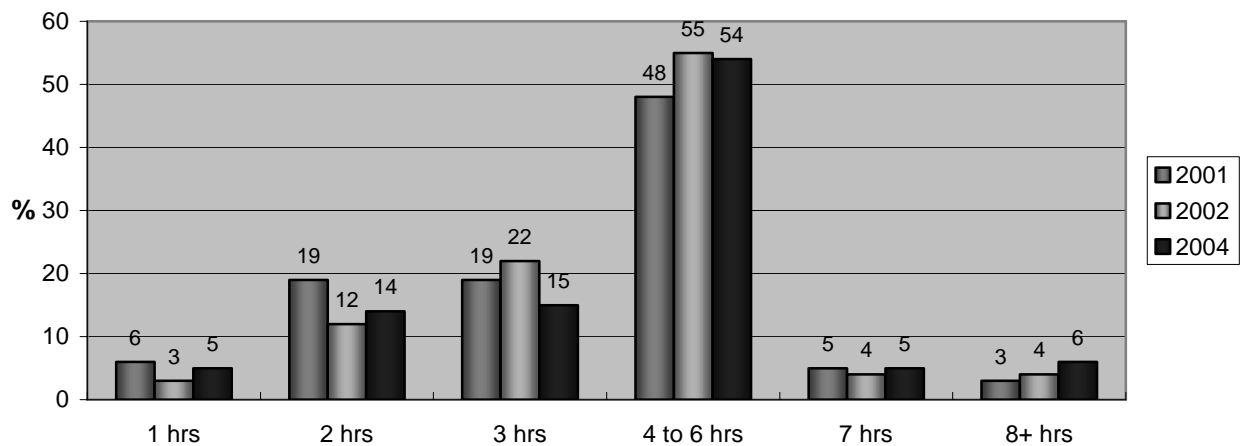
The time spent in Salisbury by day visitors ranged between 1 and 12 hours, resulting in an average of 4.3 hours. This was slightly lower than the average for ‘all historic towns’ (4.52 hours) and ‘all destinations’ (4.63 hours), but similar to the average length of stay for day visitors in the 2002 Salisbury Visitor Survey (Table 13b).

There was little variation in the duration of day visits to Salisbury between day visitors from home and day visitors on holiday in 2004.

Table 13b: Average length of stay – all day visitors

Average length of stay (hours)	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Day visitors from home (hours)			4.34		
Day visitors on holiday (hours)			4.28		
Day visits (hours)	3.5	4.3	4.31	4.52	4.63

Figure 7: Length of stay (hours) in Salisbury 2001-2004



4.5 MAIN FORM OF TRANSPORT USED

The majority of visitors (60%) had travelled to Salisbury by private car, van or motorcycle. This relatively high usage of motor vehicles for travel is reflected nationally, with 61% of visitors to 'all historic towns' and 'all destinations' arriving by private vehicle.

29% of visitors used public transport to get to Salisbury, including 17% who travelled by train and 12% arriving by bus or coach. 9% arrived in Salisbury as part of a private coach tour and a very small minority (1%) cycled to Salisbury.

Table 14a: Main form of transport used for the longest part of the journey to Salisbury

	Day Visitors from Home	Day Visitors on Holiday	Staying Visitors	All Visitors 2004
Private vehicle (car/ van/ motorcycle etc)	133 (62%)	133 (58%)	93 (59%)	359 (60%)
Bus/coach	30 (14%)	29 (13%)	14 (9%)	73 (12%)
Train	101 (17%)	24 (11%)	42 (27%)	101 (17%)
Coach tour	13 (6%)	36 (16%)	3 (2%)	52 (9%)
Bicycle	1 (1%)	4 (2%)	1 (1%)	6 (1%)
Other	8 (1%)	3 (1%)	4 (3%)	8 (1%)
Total	213 (100%)	229 (100%)	157 (100%)	599 (100%)

As shown in Table 14b, there was little change in the types of transport used to travel to the city. 60% of visitors in 2002 used private vehicles (cars, vans or motorcycles) while a smaller proportion of visitors (20%) arrived by public transport. Respondents who arrived in Salisbury on foot in 2002 were most usually staying in accommodation within the city, however, the questionnaire wording was amended slightly in 2004 to ascertain the mode of transport used to get to Salisbury at the start of the visit.

Those mentioning 'other' modes of transport were most likely to have arrived by taxi (5 groups), mini-bus (1 group) or truck (1 group).

Table 14b: Main form of transport used – benchmark & previous survey comparisons

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Private vehicle (car/ van/ motorcycle etc)	63%	60%	60%	61%	61%
Bus/coach	12%	11%	12%	14%	13%
Train	9%	8%	17%	12%	12%
Coach tour	7%	10%	9%	4%	5%
Bicycle	0%	1%	1%	<0.5%	<0.5%
Walked	9%	9%	-	6%	7%
Other	-	-	1%	1%	2%

4.6 USE OF THE PARK & RIDE SCHEME AND TOWN CENTRE CAR PARKS

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 15: 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%)

Previous surveys did not include use of the Park & Ride scheme, only use of city centre car parks. 88% of car, van or motorcycle users parked in city centre car parks in 2002, compared with 78% in 2001 and 77% in 2000.

Visitor opinions relating to the ease and cost of parking in Salisbury City Centre are reported in Section 6.4.

4.7 USE OF THE TOURIST INFORMATION CENTRE (TIC)

One third (32%) of all respondents (n=192) had been into Salisbury TIC during their visit, varying between 17% of day visitors from home and 52% of staying visitors.

This is well above the average recorded in the 2002 survey (17%), and relatively high compared with the average for 'all historic towns' (20%) and 'all destinations' (15%).

Table 16: Use of the Tourist Information Centre

	Day visitors from home	Day visitors on holiday	Staying visitors	All visitors 2004	All visitors 2002	All historic towns (average)	All destinations (average)
Visited the TIC	37 (17%)	74 (32%)	81 (52%)	192 (32%)	17%	20%	15%
Not visited the TIC	176 (83%)	155 (68%)	76 (48%)	407 (68%)	83%	80%	85%

Visitor opinions relating to Salisbury TIC are reported in Section 6.13.

4.8 WHETHER VISITING FOR A SPECIFIC EVENT

Overall, 6% of all respondents (n=35) indicated that they were visiting Salisbury for a special event on the day they were interviewed. Those visiting for special events were fairly evenly divided across the three visitor types. As shown in Table 17, some of the events mentioned were of a private nature (weddings, funerals or meetings) rather than being public events.

Table 17: Events visited by respondents

	All respondents	Day visitors from home	Day visitors on holiday	Staying visitors
Base: respondents visiting Salisbury for an event	35	11	10	14
The market	6	4	1	1
Family wedding	6	-	2	4
The Food Fair	3	3	-	-
Funeral	3	-	1	2
Dorset Steam Fair	2	-	2	-
Choir visit	2	-	-	2
RAOB association meeting in the Town Hall	2	-	-	2
Piano auction	1	1	-	-
Conference	1	1	-	-
Antiques Fair	1	1	-	-
Friends of Salisbury Cathedral event	1	1	-	-
Archaeological event at Old Sarum	1	-	1	-
Salisbury 100 cycle race	1	-	1	-
Training event	1	-	1	-
Sponsored cycle ride to Scotland	1	-	1	-
Friends wedding in Salisbury Cathedral	1	-	-	1
Michael Ball in Concert at Wilton House	1	-	-	1
Shepton Mallett motorhome show	1	-	-	1

Half of those visiting for the market knew about it from previous visits. The respondent visiting for the antiques fair also knew about this event through previous visits. Others found out about the market from word of mouth recommendation, an AA guide book or the internet. Of those visiting for the food fair, one group knew about the event through local knowledge, while the others did not indicate how they found out about the event.

The Dorset Steam Fair and Shepton Mallet motorhome show events were held elsewhere (Dorset and Somerset respectively), but visitors mentioning these events presumably stopped in Salisbury as a direct result of travelling to/from these events.

Friends and relatives were the main source of information for those visiting the archaeological event at Old Sarum and the Michael Ball concert at Wilton House.

Cycle magazine was the source of publicity for the respondent visiting for the Salisbury 100 cycle race, while respondents visiting for the choir visit and sponsored cycle ride found out about these events direct from the event organisers.

4.9 HOW FIRST BECAME AWARE OF SALISBURY AS A PLACE TO VISIT

Visitors were asked how they first became aware of Salisbury as a place to visit.

Not surprisingly, a wide range of responses were mentioned. Among the domestic visitors, a relatively high proportion had always known about Salisbury or lived locally (20%). Recommendation by friends or relatives (8%), previous visits to the area (8%) or the presence of friends or relatives living in the Salisbury area (8%) were factors frequently mentioned by domestic visitors, and several visitors had lived or been born in the Salisbury area (6%).

For overseas visitors, recommendation by friends or relatives (12%) was the most significant factor in becoming aware of Salisbury as a place to visit. However, Salisbury's location or proximity to Stonehenge and other places of interest was frequently mentioned (9%), as were guide books (8%) and tourist leaflets (8%). A number of overseas visitors became aware of Salisbury through their tour itinerary (5%) or through their language school or college (5%). Previous visits to the Salisbury area and/or friends or relatives living in the area were also of significance to overseas visitors.

Table 18: How respondents first became aware of Salisbury as a place to visit

	Visitor Type					
	All visitors		Domestic		Overseas	
Base:	599		410		189	
No reply	57	9.5%	38	9.3%	19	10.1%
Always known/ lived locally/ local knowledge	82	13.7%	82	20.0%	-	-
Recommended by friends/ relatives	56	9.3%	33	8.0%	23	12.2%
Previous visit(s) to the area	40	6.7%	33	8.0%	7	3.7%
Friends/ relatives live in the area	40	6.7%	32	7.8%	8	4.2%
Used to live in the area/ born here	32	5.3%	25	6.1%	7	3.7%
As a school child/ from teachers/ at college	28	4.7%	20	4.9%	8	4.2%
Well known/ famous	26	4.3%	21	5.1%	5	2.6%
Location relatively close to Stonehenge & other places of interest	24	4.0%	7	1.7%	17	9.0%
From guide book	24	4.0%	9	2.2%	15	7.9%
Part of an organised tour itinerary	20	3.3%	10	2.4%	10	5.3%
Through work/ looking for work	19	3.2%	14	3.4%	5	2.6%
Passing through en route to other places	16	2.7%	15	3.7%	1	0.5%
Knowledge of the cathedral	15	2.5%	13	3.2%	2	1.1%
From parents/ family/ childhood visits	14	2.3%	8	2.0%	6	3.2%
From tourist leaflets/ guide books	11	1.8%	2	0.5%	9	4.8%
From tourist maps	9	1.5%	7	1.7%	2	1.1%
Through language school/ college	9	1.5%	-	-	9	4.8%
Via the internet	8	1.3%	3	0.7%	5	2.6%
From history classes/ history books	7	1.2%	4	1.0%	3	1.6%
Somewhere close to accommodation base to visit	7	1.2%	5	1.2%	2	1.1%
Lonely Planet guide	6	1.0%	-	-	6	3.2%
Came to school in Salisbury/ locally	5	0.8%	4	1.0%	1	0.5%
The book "Sarum"	5	0.8%	2	0.5%	3	1.6%
From Constable's paintings	4	0.7%	2	0.5%	2	1.1%
Through a Tourist Office in home country	4	0.7%	1	0.2%	3	1.6%
Through books - many years ago	3	0.5%	2	0.5%	1	0.5%
Train timetable/ railway connections	3	0.5%	2	0.5%	1	0.5%

Table 18 continued	All visitors		Domestic		Overseas	
Base:	599		410		189	
Don't know	3	0.5%	3	0.7%	-	-
Researched it	3	0.5%	1	0.2%	2	1.1%
Through visits to Portsmouth or other cathedral cities	2	0.3%	2	0.5%	-	-
Research - from a book about Sarum	2	0.3%	-	-	2	1.1%
Spouse/partner came from the Salisbury area	2	0.3%	2	0.5%	-	-
Feature on TV	2	0.3%	2	0.5%	-	-
Through university (organised visit)	2	0.3%	-	-	2	1.1%
Through interest in architecture	2	0.3%	1	0.2%	1	0.5%
Through a Tourist Information Centre elsewhere in the UK	2	0.3%	1	0.2%	1	0.5%
Coach tour guide	2	0.3%	1	0.2%	1	0.5%
School visit as a child	1	0.2%	1	0.2%	-	-
Heard it had good nightlife	1	0.2%	1	0.2%	-	-
Through Wiltshire Cycleway	1	0.2%	1	0.2%	-	-
Saw a video on Salisbury	1	0.2%	1	0.2%	-	-
Wetherspoons directory	1	0.2%	1	0.2%	-	-
Usually go to the races	1	0.2%	1	0.2%	-	-
Through house-exchange scheme	1	0.2%	-	-	1	0.5%
Caravan Club brochure	1	0.2%	1	0.2%	-	-
Through a specialist tour operator	1	0.2%	1	0.2%	-	-
Read a book about Stonehenge	1	0.2%	-	-	1	0.5%
Japanese TV programme/feature	1	0.2%	-	-	1	0.5%
Husband based locally (in the Army)	1	0.2%	1	0.2%	-	-
Bus driver recommended Salisbury	1	0.2%	1	0.2%	-	-
Through Shakespeare's references	1	0.2%	-	-	1	0.5%
Posted locally as a young soldier	1	0.2%	1	0.2%	-	-
Through camping club - Hudsons camping & para-karting	1	0.2%	1	0.2%	-	-
Through a foreign exchange agency	1	0.2%	-	-	1	0.5%
Free rail ticket	1	0.2%	1	0.2%	-	-
Bus service from Wimborne	1	0.2%	1	0.2%	-	-
World Heritage sites	1	0.2%	1	0.2%	-	-
Used to live in the UK	1	0.2%	-	-	1	0.5%
Through church	1	0.2%	1	0.2%	-	-

4.10 WHETHER VISITORS HAD SEEN ANY ADVERTS, LEAFLETS OR PROMOTIONS FOR SALISBURY

Visitors were shown a list of adverts, leaflets and promotional materials for Salisbury and asked whether they had seen/heard any of these.

As shown in Table 19a (overleaf), staying visitors were much more likely to have seen promotional materials than either day visitors on holiday or day visitors from home (46% compared with 29% and 13% respectively). These findings are broadly consistent with use of Salisbury Tourist Information Centre by the various visitor types, highlighted in Section 4.7.

Table 19a: Adverts, leaflets or promotions seen

	All visitors		Day visitors from home		Day visitors on holiday		Staying visitors	
Base:	599		213		229		157	
Salisbury City Map	93	16%	11	5%	37	16%	45	29%
Salisbury Mini Guide	47	8%	9	4%	22	10%	16	10%
Salisbury Visitor Guide	14	2%	-	-	5	2%	9	6%
What's On guide	13	2%	1	0.5%	2	1%	10	6%
Other leaflet or brochure	32	5%	7	3%	12	5%	13	8%
Internet/websites	6	1%	-	-	1	<0.5%	5	3%
Radio or television features	3	0.5%	1	0.5%	1	<0.5%	1	1%
Posters	2	<0.5%	-	-	-	-	2	1%
Newspaper or magazine features	1	<0.5%	-	-	-	-	1	1%
Other	27	5%	10	5%	10	4%	7	5%
No reply/ none seen	433	72%	186	87%	163	71%	84	54%

NB: Multiple responses permitted

Visitors were most likely to recall seeing Salisbury City Maps (16%) or Mini Guides (8%). Relatively few visitors could recall seeing the main Visitor Guide or What's On Guide, although several respondents mentioned 'other' leaflets or brochures seen.

5% of respondents mentioned 'other' promotional materials seen. These included leaflets for specific attractions, maps, guidebooks and transport promotions.

Table 19b: Other leaflets or promotions seen

Base:	27
Cathedral leaflet	5
Personal recommendation	3
Walking maps	3
Advertisement for the Antiques Market	2
Stonehenge leaflet	2
Street map	1
Jarrold short walks	1
Buses/ bus posters	1
Wiltshire Cycleway promotions	1
Leaflet given out on coach by the driver	1
Lonely Planet guide book	1
Promotions for the Steam Fair	1
Promotions for the bus service between Salisbury & Poole	1
Local food directory	1
Promotions for buses to Stonehenge & Salisbury from Winchester	1
Leaflet for Mompesson House	1
New Forest guides	1
Salisbury Cathedral Guided Walks	1

5. VISITOR EXPENDITURE IN SALISBURY

5.1 ALL VISITOR SPEND – BENCHMARKING COMPARISONS

Table 20 below shows the average expenditure of all visitors to Salisbury (per person per 24 hours) compared with the average expenditure for 'all historic towns' and 'all destinations'. Figures are broken down by category of spend - accommodation, shopping, eating out, entertainment (including admissions to attractions, sports/leisure, bingo, dancing etc.) and travel (fares, parking charges, fuel etc.) paid for within Salisbury.

Table 20: Average expenditure in Salisbury - All visitors (£/per person/per 24hrs)

Category of expenditure (£)	Average spend (£) for all visitors - Salisbury	Average spend (£) 'All Historic Towns'	Average spend (£) for 'All Destinations'
Commercial accomm.*	20.83	26.08	29.00
Eating out	4.94	7.17	7.57
Shopping	8.48	11.64	11.11
Entertainment	1.11	2.13	2.56
Travel	1.79	2.14	2.39
Average spend total	37.15	49.16	52.63

* *Staying visitors only.*

Those visitors who were staying overnight in Salisbury for one or more nights in commercial accommodation spent an average of £20.83 per person per night. This is relatively low compared with the 'all historic towns' average spend (£26.08 per person per night), perhaps reflecting the high proportion of visitors staying in Salisbury who were using inexpensive types of accommodation including the Youth Hostel and campsite (refer to Table 21b, Section 5.2). The average spend on commercial accommodation in Salisbury in 2002 was £26.22 per person per night.

Visitors interviewed in Salisbury spent relatively little on eating out, approximately £4.94 per person per 24 hours compared with the average for 'all historic towns' of £7.17. The average in 2002 was also relatively low at £5.85.

The average spend per person per 24 hrs on shopping was also well below average at £8.48 per person per 24 hrs, well below the average for 'all historic towns' (£11.64) and 'all destinations' (£11.11). The benchmark expenditure perhaps reflects the higher proportion of visitors on 'special shopping trip' visits in the other historic towns⁴. The average spend on shopping in Salisbury in 2002 was much higher at £11.40.

Average spend per person per 24 hrs on entertainment (£1.11) was well below the average for 'all destinations' (£2.56) and 'all historic towns' (£2.13), but possibly reflects the fact that some of Salisbury's city centre attractions are free of charge. The average spend on entertainment in Salisbury in 2002 was also relatively low at £0.58.

⁴ The benchmark results indicate that on average, the purpose of visit for around 13% of visitors to 'historic towns' and 10% of visitors to 'all destinations' is for special shopping trips. In the case of Salisbury, it was found that only 9% of all visitors described the main purpose of their visit as being for a special shopping trip.

Visitors to Salisbury were also found to spend relatively little on travel and transport⁵ during their visit compared to visitors to other historic towns. The average spend per person per 24 hours for visitors to Salisbury was £1.79 compared with £2.14 for 'all historic towns'. The equivalent spend in 2002 was similar at £1.72.

5.2 VISITOR SPEND BY VISITOR TYPE

The average spend among staying visitors in Salisbury (per person per 24 hours) on commercial accommodation, eating out and shopping was well below the rolling average spend found in other historic towns and destinations, resulting in an average spend per person per 24 hours in Salisbury of £42.72.

Table 21a: Average spend by staying visitors (£/per person/per 24 hrs)

Category of expenditure	Average spend (£) Staying Visitors – Salisbury 2002	Average spend (£) Staying Visitors – Salisbury 2004	Average spend (£) Staying Visitors - Historic Towns	Average spend (£) Staying Visitors - All Destinations
Commercial accomm.	26.22	20.83	26.08	29.00
Eating out	6.31	9.63	10.93	11.29
Shopping	8.19	7.54	12.19	12.56
Entertainment	0.74	1.85	2.36	3.44
Travel	1.28	2.87	2.24	2.93
Total average spend	42.74	42.72	53.80	59.22

Average spend on accommodation varied significantly according to the type of accommodation used during the stay, and use of 'cheaper' types of accommodation available within Salisbury (including Hudson's Field campsite and the Youth Hostel) have resulted in a relatively low average spend per person per night.

Table 21b: Average spend on accommodation in Salisbury by staying visitors (£/per person/per 24 hrs) – by type of accommodation used

	Proportion of all staying visitors using this type of accommodation	Average spend (£pppn) on accommodation – all staying visitors Salisbury 2004
Hotel	23 (15%)	£43.08
B&B/guest house	45 (29%)	£24.27
Pub/Inn	6 (4%)	£35.14
All serviced accommodation	74 (47%)	£28.14
Rented self-catering	3 (2%)	Sample too small
Touring caravan or camping	18 (12%)	£5.08
Youth Hostel	15 (10%)	£13.60
University accommodation	1 (1%)	Sample too small
All commercial accommodation	111 (71%)	£20.83
Language school/ host family	12 (8%)	Sample too small
Home of friend or relative	33 (21%)	Assumed to be '0'
Total	156 (100%)	

⁵ This includes fuel, fares and car parking charges paid for in Salisbury

The average spend on serviced accommodation in Salisbury (£ per person per night) at £28.14 was comparable with estimated average booking values generated through the Book-a-Bed-Ahead initiative and over the counter bookings made by Salisbury Tourist Information Centre (£28 per person per night).

At £14.69 per person per day, Salisbury's average day visitor spend 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 22: 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

6. VISITORS' OPINIONS

6.1 INTRODUCTION

Since 1999, the Regional Tourist Boards have conducted visitor surveys in a total of 67 destinations throughout England, including Salisbury, as part of the Destination Benchmarking initiative. Visitors surveyed at each destination have been asked to express their opinions on the wide range of factors or indicators which together comprise the 'visitor experience'. Each factor or indicator was rated on a scale of one to five, where 1='very poor' (or the most negative response), 2='poor', 3='average', 4='good' and 5='very good' (or the most positive response), allowing an average opinion 'score' (out of a maximum of five) to be calculated for each destination.

The surveys use a standard methodology in terms of the interviewing period, minimum sample size and questionnaire design. This allows direct comparisons to be made between the results for individual destinations and the average and highest ('max.') scores from all surveys conducted throughout England and the average and highest scores obtained in certain types of destination (e.g. historic towns, resorts etc.).

In previous years, comparisons have been drawn between individual destinations and the other destinations participating in the programme that year. Since 2002, however, following user feedback, scores have been aggregated into a three year rolling average in order to provide the fullest possible comparison for each type of destination. Rolling averages also have the benefit of smoothing out random year to year fluctuations, enabling clearer observation of trends.

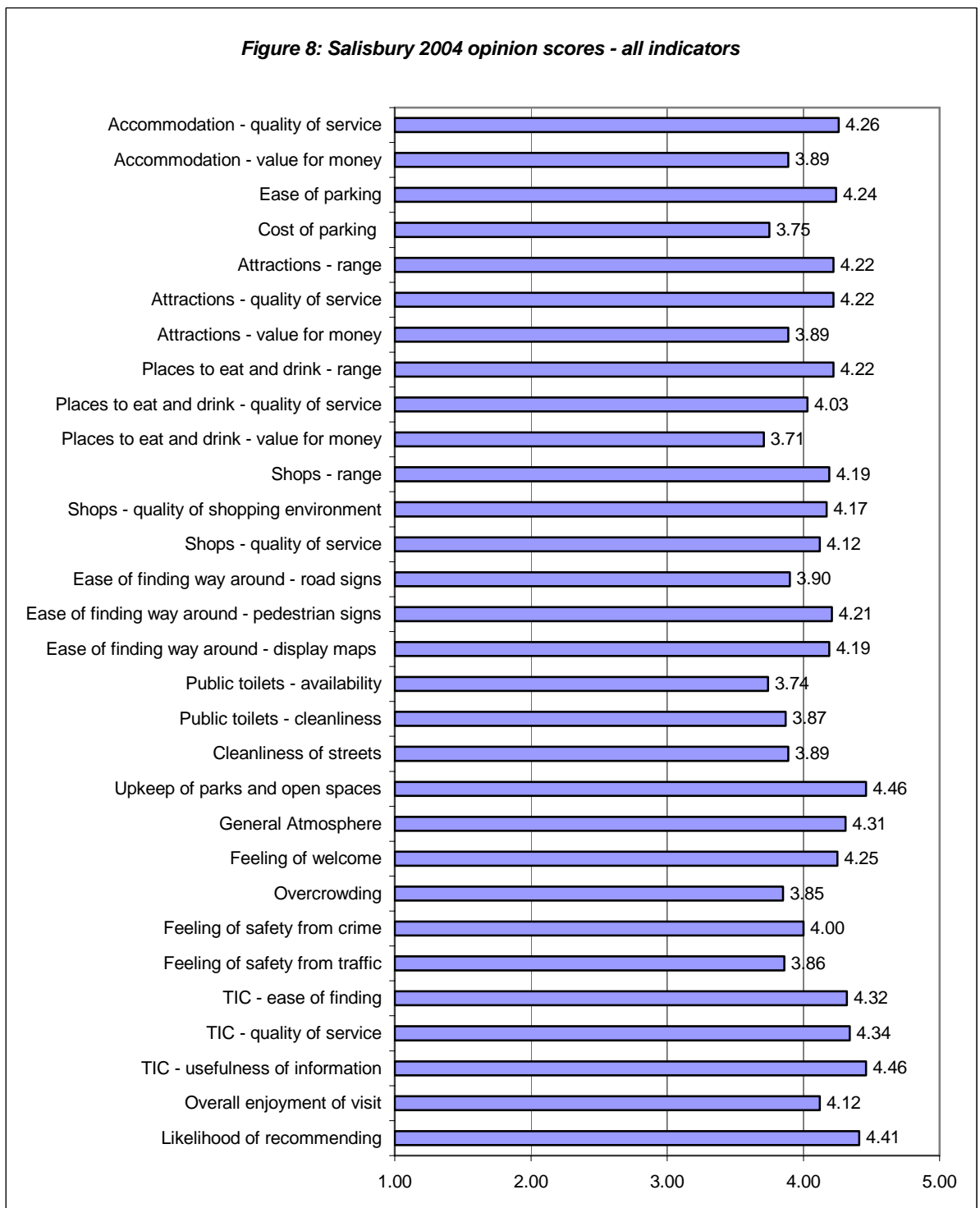
Results for all respondents are shown in Figures 8 to 21 and Tables 23 to 36. In each case, the score for Salisbury is compared with the rolling-average score for 'all destinations', and the rolling-average score for the 16 historic towns⁶. The maximum score achieved in relation to each factor or indicator is also shown for all destinations and historic towns.

Taking into account margins of error of up to +/-5%, only differentials of 0.25 or more between average scores should be considered 'statistically significant'.

6.2 AN OVERVIEW

Figure 8, overleaf, shows Salisbury's average opinion scores for all benchmarked indicators.

⁶ The survey sample of up to 19 historic towns shown in the following tables reflects the fact that some towns & cities (including Salisbury) have conducted surveys on more than one occasion within the three year period.



The highest scoring indicators related to; the upkeep of parks & open spaces (4.46), usefulness of information in the TIC (4.46), the quality of service in the TIC (4.34), general atmosphere (4.31), and feeling of welcome (4.25). The lowest scoring indicators related to; the value for money of places to eat and drink (3.71), the availability of public toilets (3.74) and the cost of parking (3.75).

Table 23, below, shows Salisbury's average score for each indicator, in comparison with the rolling-average scores for 'all historic towns' and 'all destinations'. The scores highlighted in **bold** reflect indicators where Salisbury performed relatively well in 2004.

Table 23: Average benchmarking scores for Salisbury (2004), all historic towns and all destinations

Indicator	Salisbury	All historic towns	All destinations
Accommodation - quality of service	4.26	4.32	4.29
Accommodation - value for money	3.89	4.11	4.17
Ease of parking	4.24	4.00	4.02
Cost of parking	3.75	3.32	3.44
Attractions - range	4.22	4.32	4.15
Attractions - quality of service	4.22	4.27	4.16
Attractions - value for money	3.89	4.01	4.03
Places to eat and drink - range	4.22	4.24	4.19
Places to eat and drink - quality of service	4.03	4.15	4.12
Places to eat and drink - value for money	3.71	3.89	3.95
Shops - range	4.19	4.18	4.10
Shops - quality of shopping environment	4.17	4.23	4.12
Shops - quality of service	4.12	4.15	4.10
Ease of finding way around - road signs	3.90	3.98	4.02
Ease of finding way around - pedestrian signs	4.21	4.06	4.06
Ease of finding way around - display maps	4.19	3.94	3.94
Public toilets - availability	3.74	3.45	3.45
Public toilets - cleanliness	3.87	3.57	3.56
Cleanliness of streets	3.89	4.03	4.00
Upkeep of parks and open spaces	4.46	4.33	4.24
General Atmosphere	4.31	4.45	4.38
Feeling of welcome	4.25	4.38	4.34
Overcrowding	3.85	3.85	-
Feeling of safety from crime	4.00	4.13	4.09
Feeling of safety from traffic	3.86	4.03	4.03
TIC - ease of finding	4.32	4.10	4.12
TIC - quality of service	4.34	4.35	4.37
TIC - usefulness of information	4.46	4.34	4.36
Overall enjoyment of visit	4.12	4.17	4.14
Likelihood of recommending	4.41	4.51	4.43

6.3 ACCOMMODATION

Visitors who were staying in commercial accommodation within Salisbury (n=92) were invited to comment on the quality of service and value for money provided by their accommodation establishment. As shown in Figure 9, the quality of service and value for money of accommodation establishments in Salisbury were rated lower than in the 2002 survey, and the average score for value for money (in particular) was well below the 'all historic towns' and 'all destinations' averages.

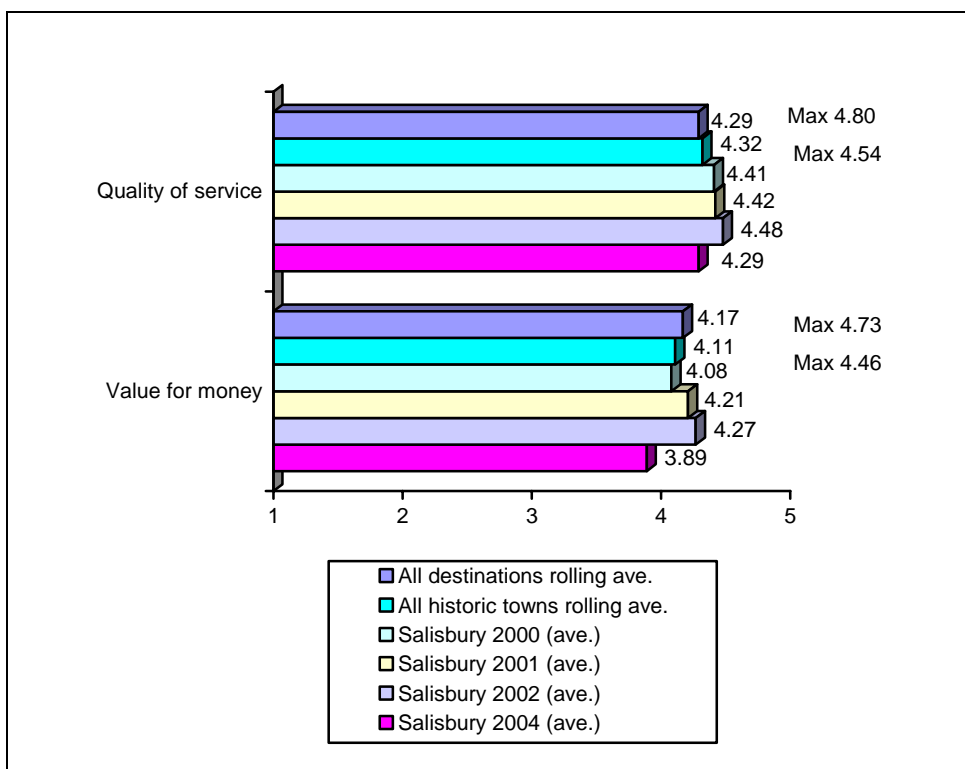


Figure 9: Opinions on commercial accommodation

Where 1='Very poor', 2='Poor', 3='Average', 4='Good' and 5='Very Good'

None of those visitors staying in commercial accommodation in 2004 rated the quality of service in their establishment as 'poor' or 'very poor', however, visitors were more likely to describe this aspect of their visit as 'good' rather than 'very good' (Table 24a).

Table 24a: Visitor opinions on quality of service in accommodation

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	112	89	92	19 historic towns	51 destinations
Mean	4.42	4.48	4.29	4.32	4.29
Very poor	1%	1%	-	1% (Max 5%)	1% (Max 12%)
Poor	4%	2%	-	2%	3%
Average	12%	10%	13%	13%	12%
Good	21%	20%	45%	33%	34%
Very good	63%	66%	42%	51% (Max 71%)	50% (Max 80%)

The average score for quality of service in commercial accommodation establishments was slightly lower than in previous years, but remained on a par with the average for 'all historic towns' and 'all destinations'.

In terms of value for money, Salisbury's accommodation establishments still show scope for improvement. 8% of those staying in commercial accommodation described the value for money of their accommodation as 'poor' or 'very poor'. The average score in 2004 was well below that achieved in previous years, and well below the 'historic towns' and 'all destinations' averages.

Table 24b: Visitor opinions on value for money of accommodation

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	111	86	84	19 historic towns	52 destinations
Mean	4.21	4.27	3.89	4.11	4.17
Very poor	0%	1%	1%	1% (Max 4%)	1% (Max 10%)
Poor	5%	2%	7%	5%	4%
Average	14%	16%	19%	17%	15%
Good	37%	29%	46%	36%	34%
Very good	44%	51%	26%	40% (Max 67%)	45% (Max 77%)

6.4 CAR PARKING

Visitors who used city centre car parks in Salisbury (n=221) were invited to comment on the ease and cost of parking in the city.

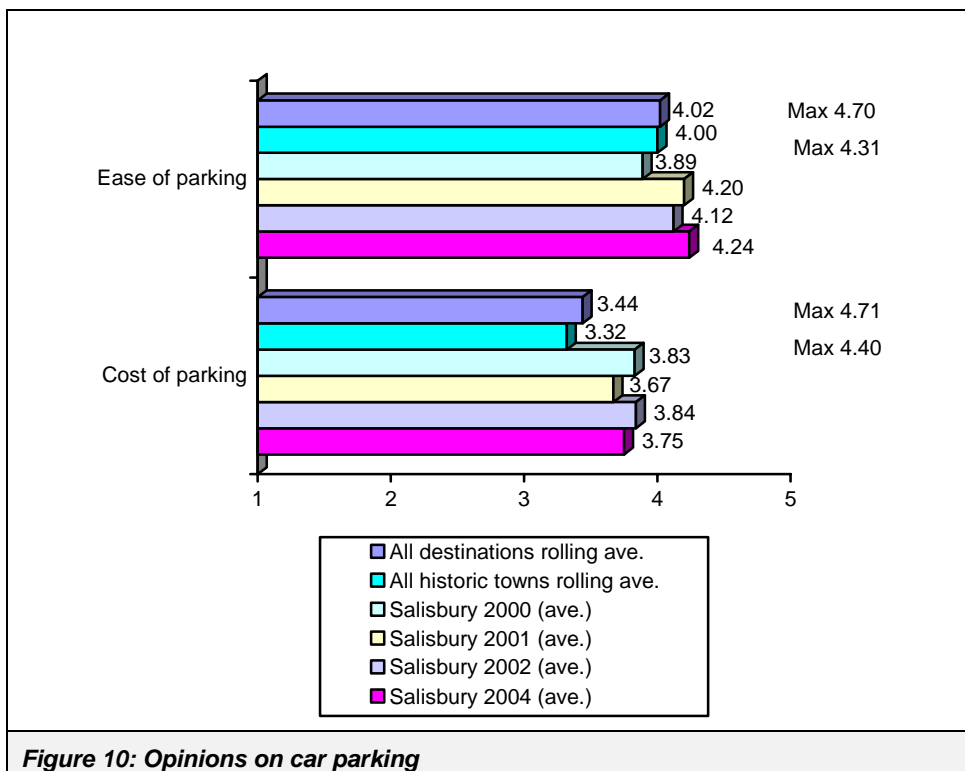


Figure 10: Opinions on car parking

As shown in Figure 10, Salisbury performed relatively well in terms of both the ease and cost of parking in the city centre.

87% of respondents described the ease of parking in Salisbury city centre as 'good' or 'very good', resulting in an average score of 4.24. This was broadly comparable with previous survey results, and Salisbury has generally performed well in this respect compared with other historic towns and destinations.

Around 10% of those using car parks in Salisbury each survey year, however, describe the ease of parking as 'difficult' or 'very difficult', so there is still room for improvement in this respect.

Table 25a: Visitor opinions on the ease of parking in city centre car parks

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	317	320	219	19 historic towns	55 destinations
Mean	4.20	4.12	4.24	4.00	4.02
Very difficult	1%	2%	2%	4% (Max 14%)	5% (Max 62%)
Quite difficult	9%	8%	9%	10%	9%
Neither/nor	7%	7%	2%	6%	6%
Easy	35%	45%	39%	39%	38%
Very easy	48%	39%	48%	40% (Max 61%)	42% (Max 77%)

Visitor opinions on the cost of parking in Salisbury city centre in 2004 were consistent with previous survey results, remaining well above the average for 'historic towns' and 'all destinations'. Over two thirds of respondents in 2004 rated the cost of parking in the city as 'reasonable' or 'very reasonable', but 18% felt that the cost of parking was 'quite expensive' or 'very expensive'.

Table 25b: Visitor opinions on the cost of parking in city centre car parks

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	284	268	204	19 historic towns	55 destinations
Mean	3.67	3.84	3.75	3.32	3.44
Very expensive	7%	5%	4%	10% (Max 40%)	8% (Max 40%)
Quite expensive	12%	10%	14%	16%	15%
Average	17%	17%	11%	23%	25%
Reasonable	38%	31%	44%	32%	33%
Very reasonable	27%	37%	27%	18% (Max 56%)	21% (Max 86%)

6.5 **ATTRACTIONS & PLACES TO VISIT**

As shown in Figure 11, Salisbury's attractions and places to visit were rated on a par with 2002 in terms of the range of attractions and value for money, but showed an encouraging improvement in terms of quality of service.

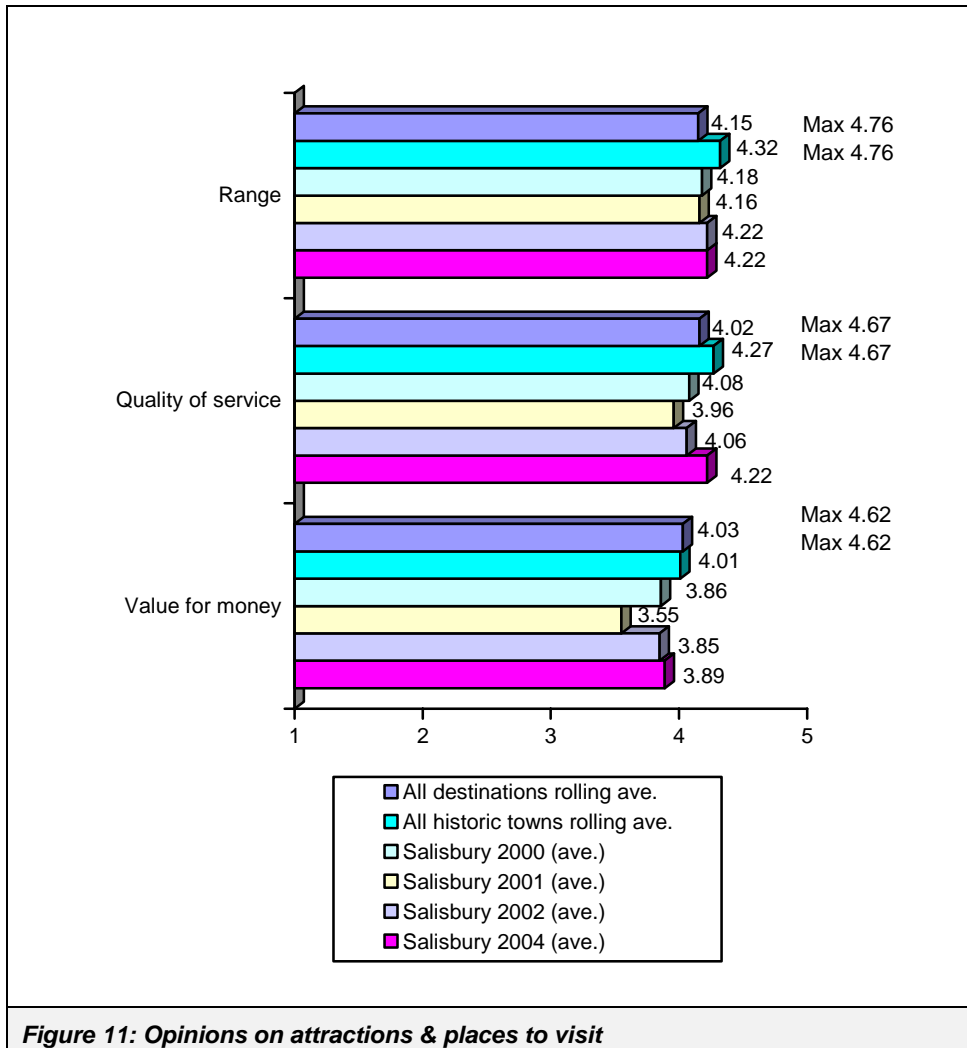


Figure 11: Opinions on attractions & places to visit

Where 1='Very poor', 2='Poor', 3='Average', 4='Good' and 5='Very Good'

The range of attractions and places to visit in Salisbury was rated very slightly below the average for 'historic towns' but on a par with 'all destinations'. As shown in Table 26a, 92% of respondents described this aspect of their visit as 'good' or 'very good'.

The quality of service in Salisbury's attractions was also rated 'good', on a par with the average for 'historic towns' and relatively high compared with previous survey results. 93% of respondents rated this aspect of their visit as 'good' or 'very good' in 2004 compared with 81% in 2002 (Table 26b).

The value for money of Salisbury's attractions was rated slightly below the average for 'historic towns' and all destinations' but was comparable with scores achieved in 2002 and 2000 (Table 26c).

Table 26a: Visitor opinions on the range of attractions & places to visit

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	518	549	303	19 historic towns	55 destinations
Mean	4.16	4.22	4.22	4.32	4.15
Very poor	0%	-	-	0% (Max 1%)	1% (Max 7%)
Poor	2%	4%	1%	1%	3%
Average	15%	9%	7%	10%	14%
Good	48%	49%	62%	44%	44%
Very good	35%	38%	30%	45% (Max 80%)	38% (Max 80%)

Table 26b: Visitor opinions on the quality of service in attractions & places to visit

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	367	470	251	19 historic towns	54 destinations
Mean	3.96	4.06	4.22	4.27	4.16
Very poor	0%	0%	-	0% (Max 3%)	0% (Max 3%)
Poor	2%	3%	1%	1%	1%
Average	26%	16%	6%	11%	15%
Good	46%	52%	64%	47%	49%
Very good	26%	29%	29%	41% (Max 77%)	35% (Max 77%)

Table 26c: Visitor opinions on the value for money of attractions & places to visit

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	359	463	244	19 historic towns	54 destinations
Mean	3.55	3.85	3.89	4.01	4.03
Very poor	2%	2%	<0.5%	1% (Max 5%)	1% (Max 5%)
Poor	8%	5%	7%	4%	3%
Average	39%	24%	16%	19%	19%
Good	36%	48%	57%	45%	46%
Very good	15%	22%	20%	31% (Max 74%)	31% (Max 74%)

6.6 PLACES TO EAT & DRINK

As shown in Figure 12, the range of places to eat and drink in Salisbury was rated on a par with 'historic towns' and 'all destinations', but was rated slightly lower than in the 2002 survey. The quality of service in places to eat & drink was rated slightly below the average for 'historic towns' and 'all destinations' and value for money was also below average.

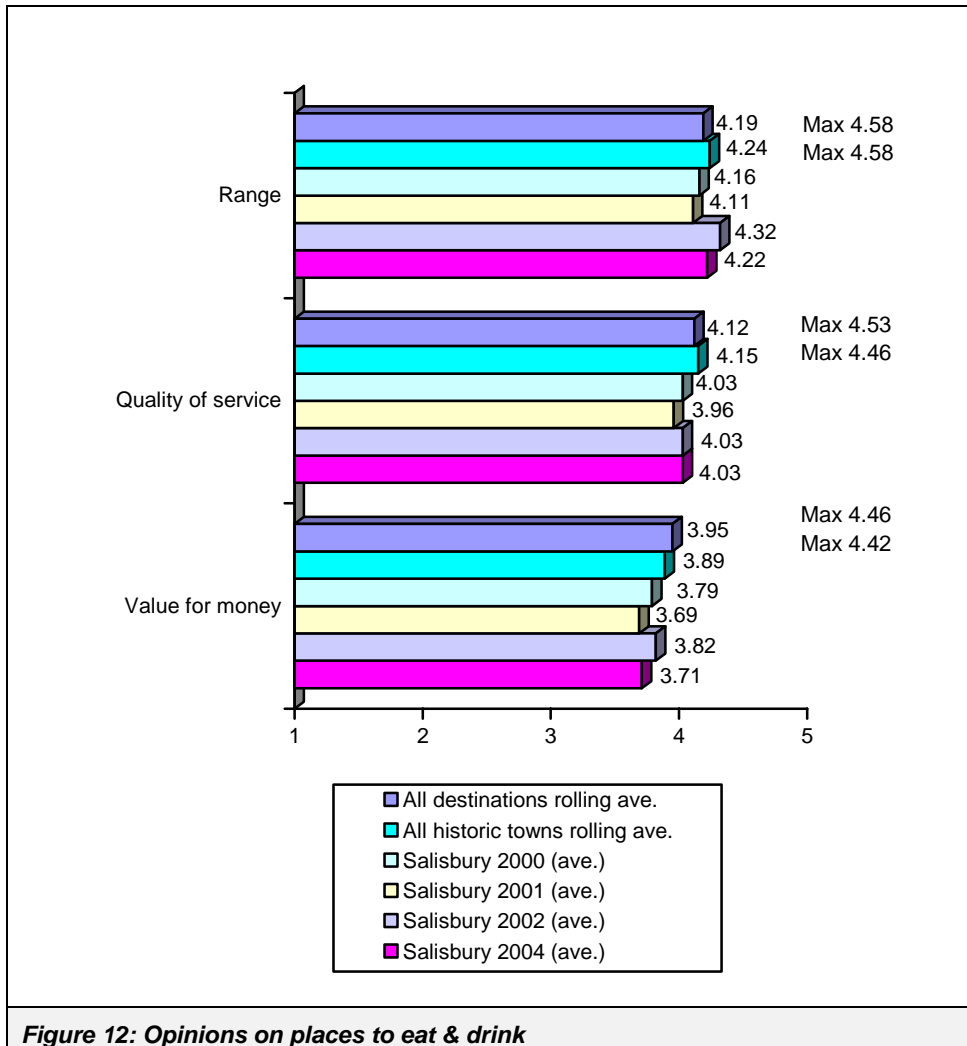


Figure 12: Opinions on places to eat & drink

Where 1='Very poor', 2='Poor', 3='Average', 4='Good' and 5='Very Good'

Overall, the range of places to eat and drink in Salisbury was considered to be 'good', but was slightly lower than the average achieved in 2002 (Table 27a).

The quality of service in places to eat and drink within Salisbury was rated on a par in 2004, 2002 and 2000 at 4.03 out of 5.00, however, fewer visitors in 2004 described this aspect of their visit as 'poor' or 'very poor' (Table 27b). The averages for 'historic towns' and 'all destinations' were marginally higher at 4.15 and 4.12 respectively.

In contrast, the value for money of places to eat and drink shows considerable scope for improvement. This was rated the lowest of all aspects surveyed in 2004, and was well below the average for 'historic towns' and

'all destinations' (Table 27c). 13% of respondents who had visited places to eat & drink in 2004 described this aspect of their visit to Salisbury as 'poor' or 'very poor' compared with 7% in 2002 and 8% in 2001.

Table 27a: Visitor opinions on the range of places to eat & drink

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	506	561	265	19 historic towns	55 destinations
Mean	4.11	4.32	4.22	4.24	4.19
Very poor	1%	1%	-	1% (Max 5%)	1% (Max 5%)
Poor	5%	2%	2%	2%	3%
Average	13%	7%	8%	12%	13%
Good	44%	43%	56%	43%	44%
Very good	37%	47%	34%	43% (Max 69%)	40% (Max 69%)

Table 27b: Visitor opinions on the quality of service in places to eat & drink

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	428	522	265	19 historic towns	55 destinations
Mean	3.96	4.03	4.03	4.15	4.12
Very poor	1%	1%	-	1% (Max 6%)	1% (Max 6%)
Poor	4%	3%	2%	2%	2%
Average	19%	15%	15%	14%	16%
Good	52%	54%	61%	49%	48%
Very good	25%	27%	22%	35% (Max 68%)	33% (Max 68%)

Table 27c: Visitor opinions on the value for money of places to eat & drink

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	431	521	261	19 historic towns	54 destinations
Mean	3.69	3.82	3.71	3.89	3.95
Very poor	2%	2%	1%	1% (Max 6%)	1% (Max 6%)
Poor	6%	5%	12%	5%	4%
Average	30%	23%	18%	23%	21%
Good	46%	48%	55%	45%	46%
Very good	16%	21%	18%	26% (Max 64%)	28% (Max 64%)

6.7 SHOPPING

Salisbury performed particularly well in 2002 in terms of the range of shops and quality of the shopping environment. In 2004, however, only a relatively 'average' performance was recorded for all three aspects relating to the shops.

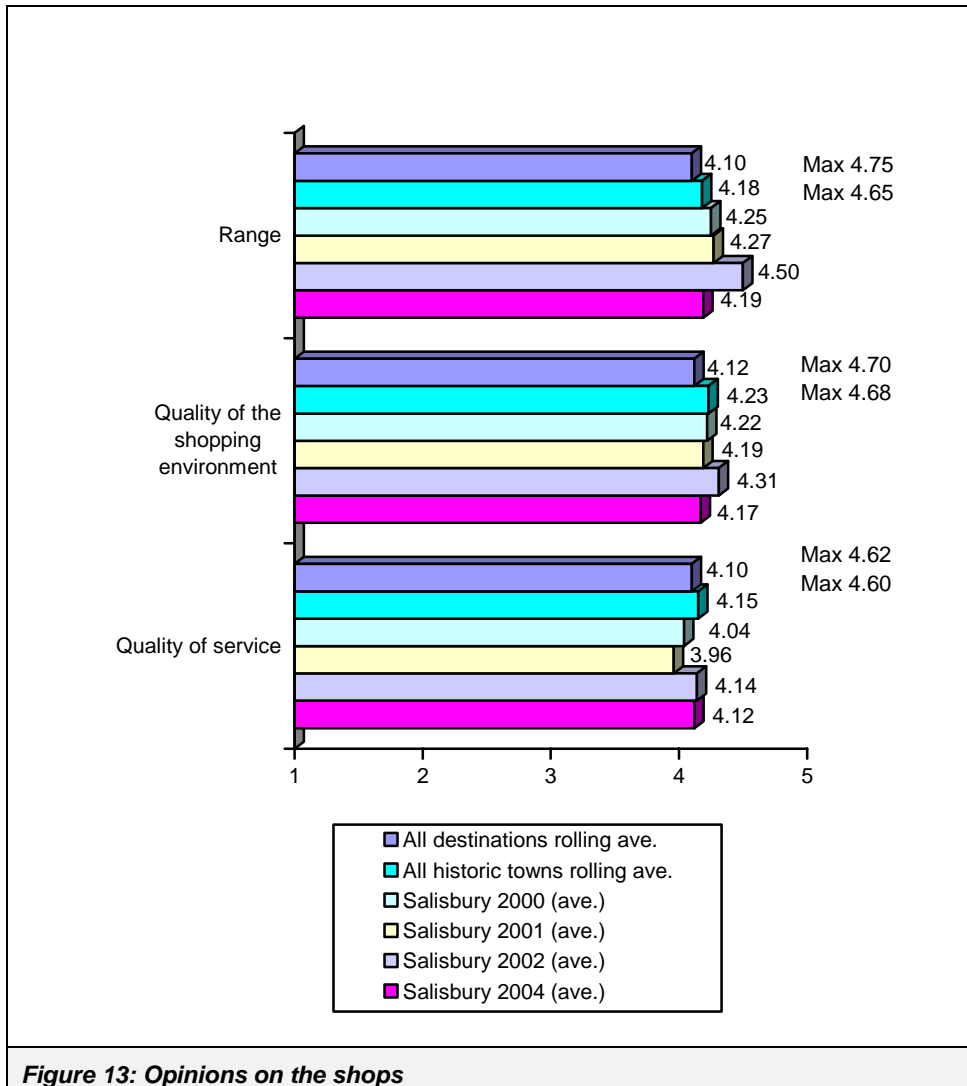


Figure 13: Opinions on the shops

Where 1='Very poor', 2='Poor', 3='Average', 4='Good' and 5='Very Good'

Visitor opinions on the range of shops in Salisbury resulted in an average score of 4.19 in 2004. This was significantly below the average achieved in 2002, slightly below the average scores achieved in 2001 and 2000, but comparable with the rolling average for 'historic towns'.

62% of respondents rated the range of shops as 'very good' in 2002, but this fell to only 31% in 2004 (Table 28a).

The quality of the shopping environment was also rated lower than in 2002, but achieved an average score on a par with 2001 and 2000, remaining comparable with the average for 'historic towns' and 'all destinations' (Table 28b).

Opinion scores relating to the quality of service in shops resulted in an average score of 4.12 out of 5.00. This was similar to the average achieved in 2002 and comparable with the average for 'historic towns' and 'all destinations' (Table 28c).

Table 28a: Visitor opinions on the range of shops

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	572	575	312	19 historic towns	55 destinations
Mean	4.27	4.50	4.19	4.18	4.10
Very poor	0%	1%	-	1% (Max 3%)	1% (Max 5%)
Poor	2%	2%	1%	3%	5%
Average	12%	5%	10%	14%	16%
Good	44%	30%	58%	41%	40%
Very good	42%	62%	31%	41% (Max 75%)	38% (Max 80%)

Table 28b: Visitor opinions on the quality of the shopping environment

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	568	572	312	19 historic towns	54 destinations
Mean	4.19	4.31	4.17	4.23	4.12
Very poor	0%	1%	<0.5%	1% (Max 3%)	1% (Max 3%)
Poor	2%	2%	1%	2%	3%
Average	13%	9%	10%	12%	16%
Good	48%	43%	60%	46%	44%
Very good	36%	45%	29%	40% (Max 79%)	36% (Max 79%)

Table 28c: Visitor opinions on the quality of service in shops

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	492	539	286	19 historic towns	55 destinations
Mean	3.96	4.14	4.12	4.15	4.10
Very poor	0%	1%	<0.5%	1% (Max 3%)	0% (Max 3%)
Poor	2%	2%	1%	1%	2%
Average	23%	12%	10%	15%	17%
Good	52%	55%	63%	49%	47%
Very good	23%	31%	26%	34% (Max 72%)	33% (Max 72%)

6.8 EASE OF FINDING WAY AROUND

As shown in Figure 14, visitor opinions on road signage in 2004 are reflected in a score slightly below the average for 'historic towns' and 'all destinations', well above the average score in 2001 but below the average achieved in 2002. 13% of respondents described this aspect of their visit as 'poor' or 'very poor' in 2004 (Table 29a), indicating a need for improved road signage into and within Salisbury City.

In contrast, visitor opinions on pedestrian signage in Salisbury have been relatively consistent over the last four years, remaining slightly above the average for 'historic towns' and 'all destinations'.

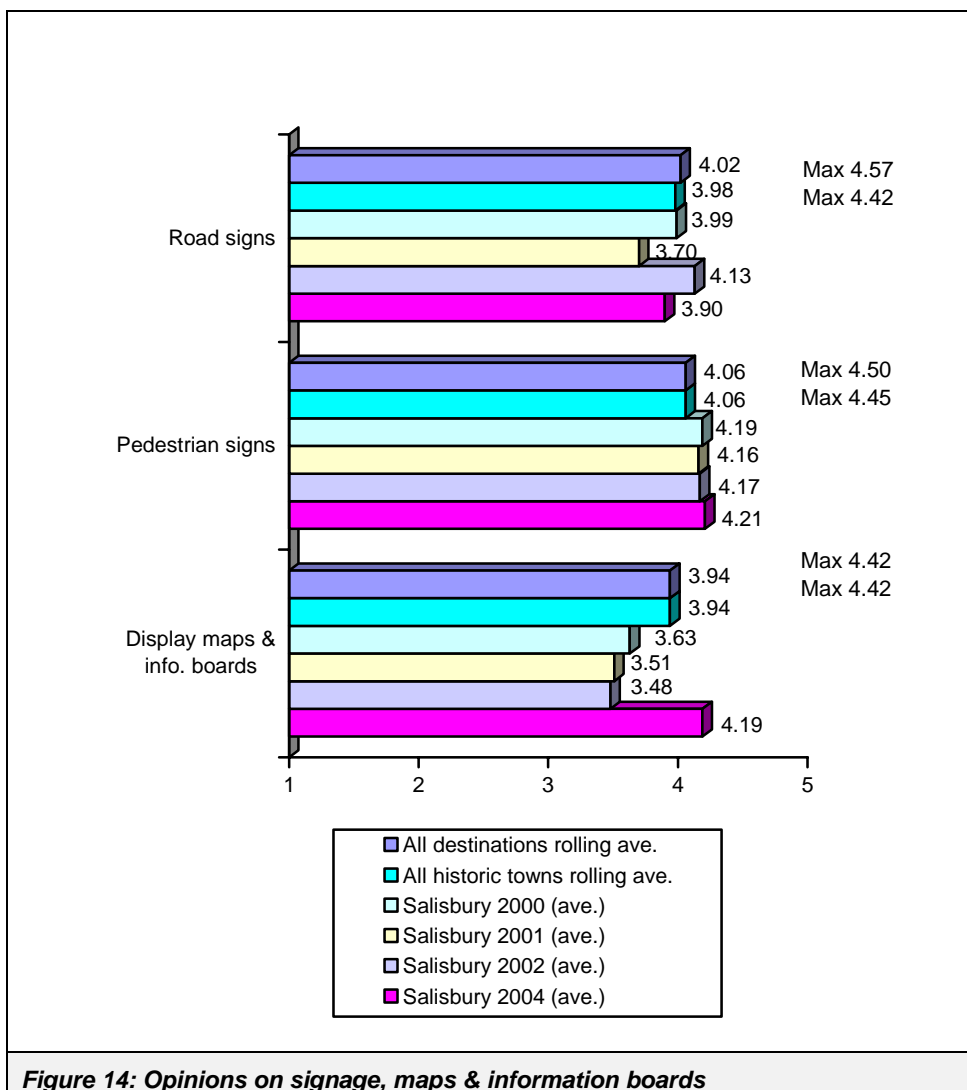


Figure 14: Opinions on signage, maps & information boards

Where 1='Very poor', 2='Poor', 3='Average', 4='Good' and 5='Very Good'

Visitor opinions relating to display maps and information boards have been well below average in previous years, but the score achieved in 2004 was significantly higher than in recent survey years and comfortably above the average for 'historic towns' and 'all destinations'. 93% of respondents rated this aspect of their visit as 'good' or 'very good' compared with 56% in 2002 and 58% in 2001 (Table 29c).

Table 29a: Visitor opinions on road signs

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	437	475	187	19 historic towns	55 destinations
Mean	3.70	4.13	3.90	3.98	4.02
Very poor	3%	1%	2%	2% (Max 8%)	2% (Max 8%)
Poor	12%	5%	11%	5%	5%
Average	21%	12%	7%	16%	14%
Good	39%	42%	57%	44%	46%
Very good	25%	39%	24%	32% (Max 63%)	33% (Max 68%)

Table 29b: Visitor opinions on pedestrian signs

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	599	581	310	19 historic towns	54 destinations
Mean	4.16	4.17	4.21	4.06	4.06
Very poor	1%	1%	-	1% (Max 5%)	1% (Max 5%)
Poor	4%	5%	4%	4%	4%
Average	10%	9%	4%	15%	14%
Good	49%	47%	58%	49%	49%
Very good	36%	38%	34%	32% (Max 65%)	31% (Max 65%)

Table 29c: Visitor opinions on display maps & information boards

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	334	506	153	19 historic towns	55 destinations
Mean	3.51	3.48	4.19	4.15	4.10
Very poor	3%	3%	1%	3% (Max 14%)	2% (Max 14%)
Poor	17%	14%	1%	5%	6%
Average	22%	27%	5%	17%	17%
Good	42%	42%	64%	45%	46%
Very good	16%	14%	29%	29% (Max 62%)	29% (Max 62%)

6.9 PUBLIC TOILETS

The availability and cleanliness of public toilet facilities are an aspect of the visitor experience where Salisbury still shows scope for improvement. While the perceived availability of public toilets in Salisbury appears to have improved steadily since 2000, visitors still consider the cleanliness of toilets in Salisbury to be relatively poor compared with the average for other destinations.

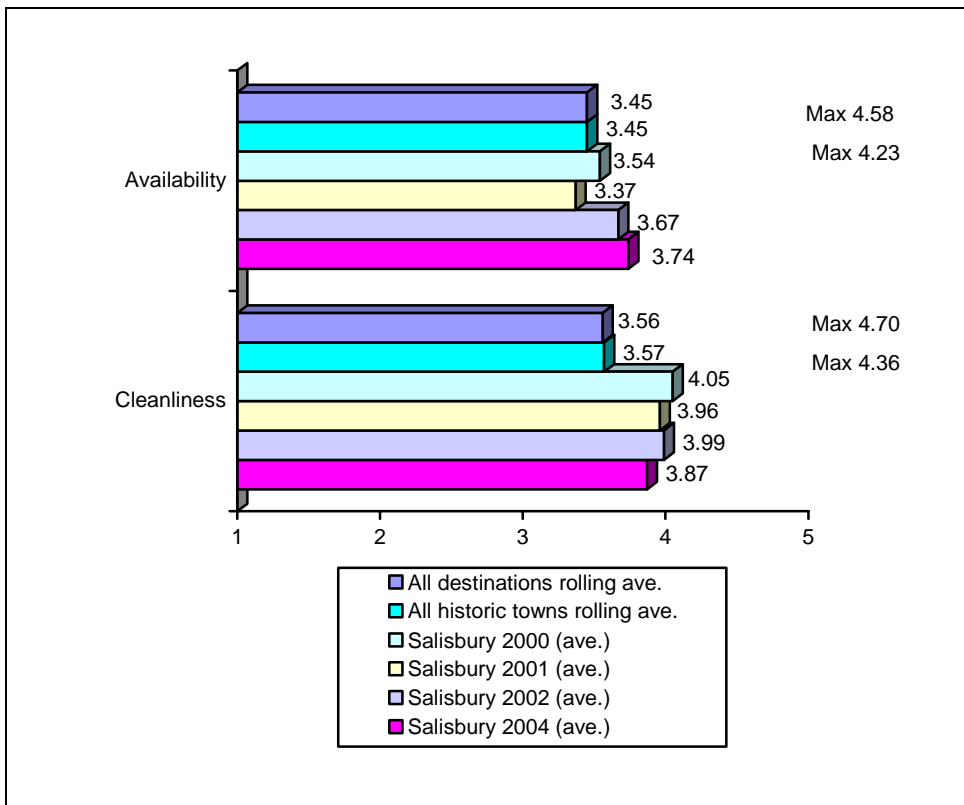


Figure 15: Opinions on public toilets

Where 1='Very poor', 2='Poor', 3='Average', 4='Good' and 5='Very Good'

72% of visitors surveyed in 2004 described the availability of public toilets in Salisbury as 'good' or 'very good', a modest improvement compared with 67% in 2002 and 55% in 2001 (Table 30a). This aspect was rated above the average for 'historic towns' and 'all destinations'. Although several public toilet facilities are provided within the city centre, it is possible that visitors need more information about where to find them.

Table 30a: Visitor opinions on the availability of public toilets

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	349	483	202	19 historic towns	55 destinations
Mean	3.37	3.67	3.74	3.45	3.45
Very poor	7%	4%	1%	7% (Max 17%)	8% (Max 38%)
Poor	22%	10%	10%	16%	15%
Average	15%	19%	16%	22%	22%
Good	38%	49%	58%	36%	34%
Very good	17%	18%	14%	19% (Max 52%)	21% (Max 70%)

Visitor opinions relating to the cleanliness of public toilets in Salisbury indicate a slight downturn since 2000, but remained comfortably above the average score for 'historic towns' and 'all destinations'. 10% of visitors rated this aspect of their visit as 'poor' or 'very poor' in 2004 compared with only 5% in 2002.

Table 30b: Visitor opinions on the cleanliness of public toilets

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	309	470	192	19 historic towns	55 destinations
Mean	3.96	3.99	3.87	3.57	3.56
Very poor	3%	1%	2%	8% (Max 18%)	7% (Max 21%)
Poor	6%	4%	8%	11%	12%
Average	16%	16%	13%	21%	23%
Good	44%	52%	56%	36%	35%
Very good	32%	27%	21%	24% (Max 46%)	24% (Max 76%)

6.10 PARKS, OPEN SPACES & STREETS

2004 results for the cleanliness of streets were slightly disappointingly compared with those achieved in previous survey years, however, Salisbury performed particularly well in terms of the upkeep of parks and open spaces (Figure 16).

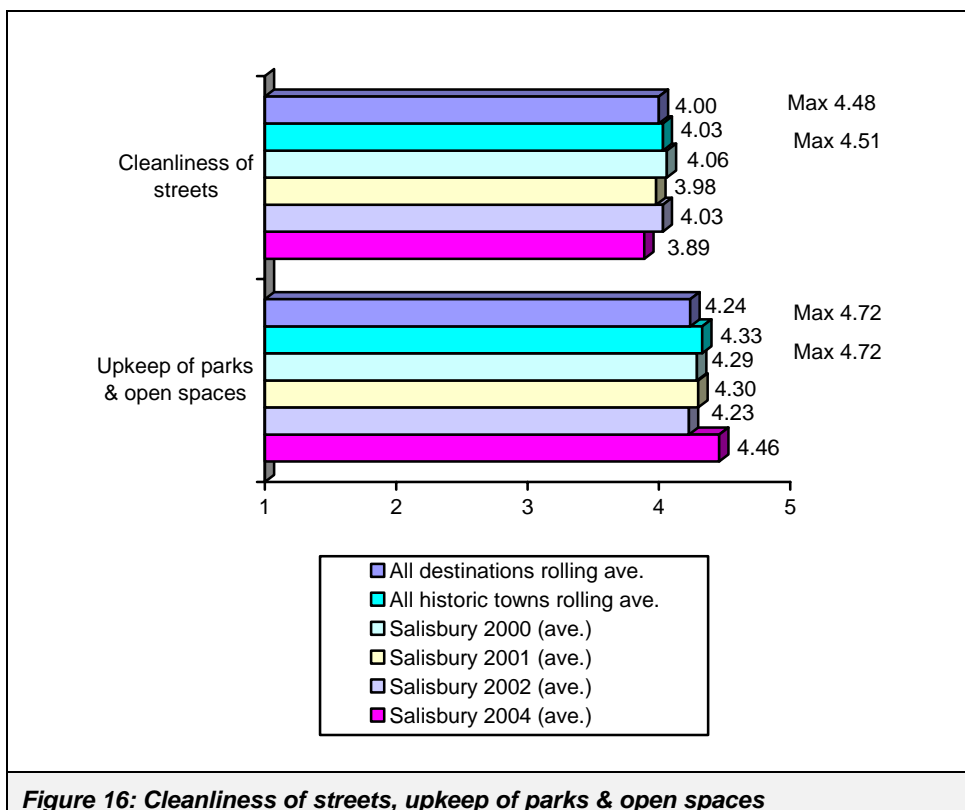


Figure 16: Cleanliness of streets, upkeep of parks & open spaces

Where 1='Very poor', 2='Poor', 3='Average', 4='Good' and 5='Very Good'

Visitor opinions relating to the cleanliness of the streets fell slightly from 4.03 in 2002 to 3.89 in 2004, remaining slightly below the average for 'historic towns' and 'all destinations'. 4% of respondents in 2004 described this aspect of their visit as 'poor' or 'very poor' (n=24) however, 74% described this aspect as 'good' or 'very good'.

Table 31a: Visitor opinions on the cleanliness of streets

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	650	588	583	19 historic towns	55 destinations
Mean	3.98	4.03	3.89	4.03	4.00
Very poor	0%	0%	<0.5%	1% (Max 4%)	1% (Max 4%)
Poor	2%	5%	4%	4%	4%
Average	22%	20%	22%	18%	18%
Good	52%	43%	54%	44%	46%
Very good	24%	32%	20%	32% (Max 58%)	30% (Max 63%)

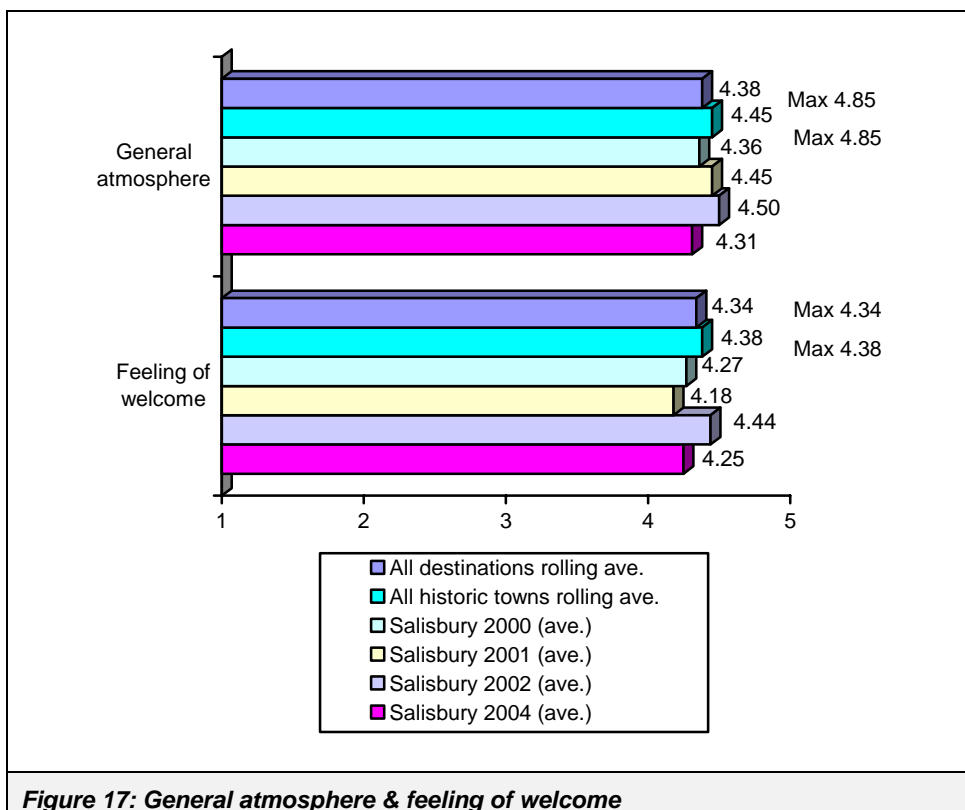
The upkeep of parks and open spaces was Salisbury's highest scoring indicator in 2004 at 4.46 out of a maximum of 5.00, with 95% of respondents describing this aspect of their visit as 'good' or 'very good'.

Table 31b: Visitor opinions on the upkeep of parks & open spaces

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	484	479	413	19 historic towns	55 destinations
Mean	4.30	4.23	4.46	4.33	4.24
Very poor	0%	1%	-	2% (Max 32%)	1% (Max 32%)
Poor	1%	4%	1%	2%	2%
Average	8%	12%	5%	9%	12%
Good	51%	37%	42%	38%	43%
Very good	40%	46%	53%	50% (Max 73%)	43% (Max 73%)

6.11 GENERAL ATMOSPHERE & FEELING OF WELCOME

The 2004 results for Salisbury's general atmosphere and feeling of welcome were lower than those achieved in 2002, and slightly below the rolling average scores for these indicators for 'historic towns' and 'all destinations'.



Where 1='Very poor', 2='Poor', 3='Average', 4='Good' and 5='Very Good'

94% of respondents rated the general atmosphere in Salisbury as 'good' or 'very good', a similar proportion to the 2002 survey, except that only 37% rated this aspect 'very good' in 2004 compared with 56% in 2002. Only three respondents considered the general atmosphere to be 'poor'.

Table 32a: Visitor opinions on the general atmosphere in Salisbury

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	651	599	576	19 historic towns	54 destinations
Mean	4.45	4.50	4.31	4.45	4.38
Very poor	0%	0%	-	0% (Max 1%)	0% (Max 2%)
Poor	0%	1%	1%	1%	1%
Average	4%	5%	5%	5%	7%
Good	47%	38%	57%	42%	44%
Very good	49%	56%	37%	52% (Max 90%)	47% (Max 90%)

The rating of the feeling of welcome for visitors to Salisbury was slightly below the average for 'historic towns' and 'all destinations', and relatively low compared with the average achieved in 2002. Only two respondents rated this aspect of their visit as 'poor' while 94% of respondents considered this aspect of their visit to be 'good' or 'very good' (92% in 2002). Once again, respondents were more likely to rate this aspect of their visit as only 'good' rather than 'very good' in 2004 compared with 2002.

Table 32b: Visitor opinions on the feeling of welcome in Salisbury

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	642	599	563	19 historic towns	54 destinations
Mean	4.18	4.44	4.25	4.38	4.34
Very poor	0%	0%	-	0% (Max 2%)	0% (Max 2%)
Poor	0%	1%	<0.5%	1%	1%
Average	12%	7%	6%	8%	9%
Good	55%	38%	62%	43%	44%
Very good	32%	54%	32%	48% (Max 88%)	46% (Max 88%)

6.12 OVERCROWDING & FEELING OF SAFETY

Visitors were asked how far they would agree or disagree with the following statements; "Salisbury is not too overcrowded", "I felt quite safe from crime in Salisbury" and "As a pedestrian in Salisbury I felt quite safe from the traffic".

As shown in Figure 18 (overleaf), in terms of perceived overcrowding, Salisbury's average score was lower than the average achieved in 2002 but comparable with the average for 'historic towns' at 3.85.

Table 33a: Visitor opinions on the statement "Salisbury is not too overcrowded"

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns
Base	643	606	579	19 historic towns
Mean	3.87	4.04	3.85	3.85
Disagree strongly	0%	0%	<0.5%	1% (Max 4%)
Disagree	7%	5%	5%	10%
Neither/nor	16%	15%	5%	13%
Agree	58%	51%	88%	56%
Agree strongly	18%	30%	1%	21% (Max 55%)

Visitor perceptions relating to feelings of safety from crime and traffic were also rated lower than in 2002, but on a par with those achieved in 2001 and 2000. These scores for Salisbury in 2004 were slightly below the rolling average scores for 'historic towns' and 'all destinations'.

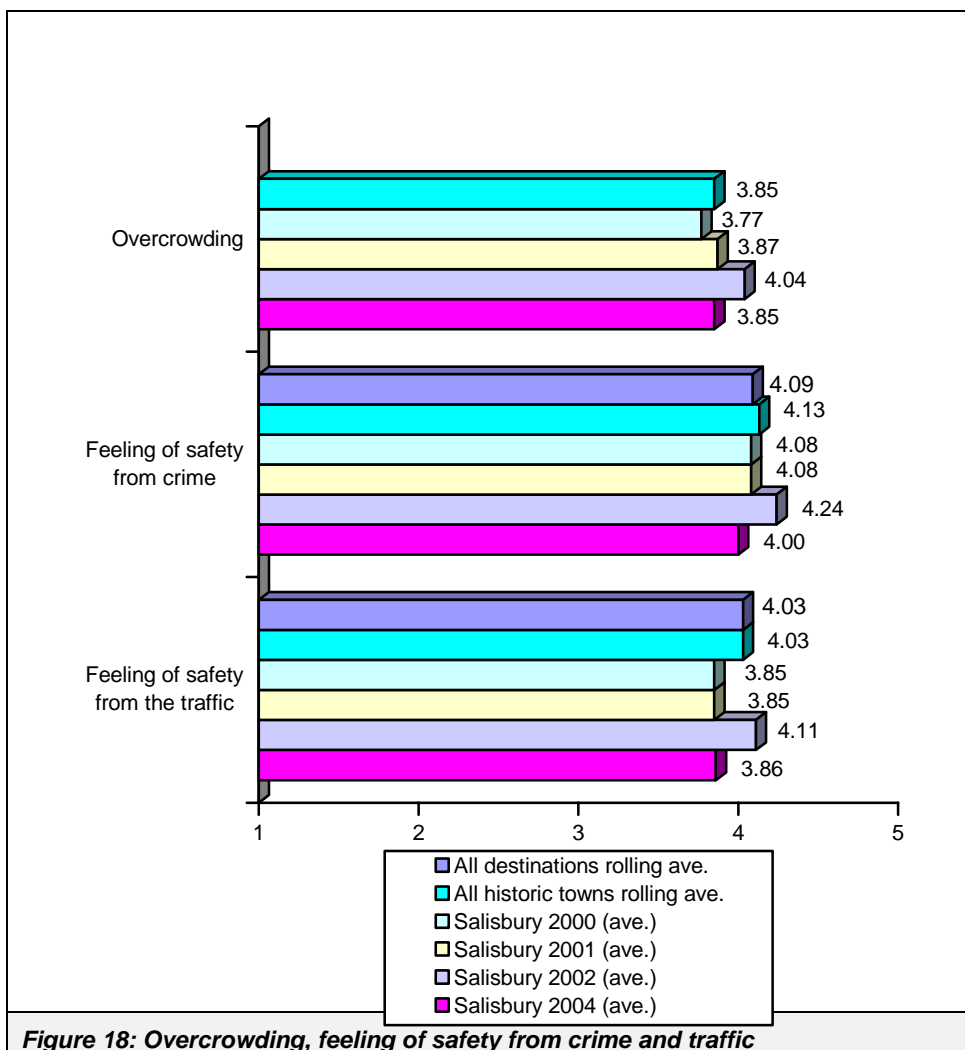


Figure 18: Overcrowding, feeling of safety from crime and traffic
 “Salisbury is not too overcrowded”, “I felt quite safe from crime in Salisbury” and “As a pedestrian in Salisbury I felt quite safe from the traffic”, where 1=‘Disagree strongly’, 2=‘Disagree’, 3=‘Neither disagree nor agree’, 4=‘Agree’ and 5=‘Agree strongly’

As shown in Table 33b, only a small minority of respondents (n=4) ‘disagreed’ with the statement relating to feeling of safety from crime in Salisbury. The vast majority ‘agreed’ with the statement, but very few expressed ‘strong agreement’ with the statement.

Table 33b: Visitor opinions on the statement “I felt quite safe from crime in Salisbury”

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	641	591	566	19 historic towns	53 destinations
Mean	4.08	4.24	4.00	4.13	4.09
Disagree strongly	1%	0%	-	2% (Max 2%)	1% (Max 3%)
Disagree	2%	1%	1%	2%	4%
Neither/nor	13%	10%	2%	9%	11%
Agree	57%	55%	93%	60%	55%
Agree strongly	27%	35%	4%	28% (Max 52%)	30% (Max 74%)

Feeling of safety from traffic was rated well below the average achieved in 2002 but was similar to scores achieved in 2001 and 2000. This aspect achieved a relatively low score in 2004 compared with the average for 'historic towns' and 'all destinations'.

5% of respondents (n=33) 'disagreed' with the statement relating to feeling of safety from traffic in Salisbury, including one who 'disagreed strongly'. Again, a high proportion of respondents 'agreed' with the statement, but very few 'strongly agreed'.

Table 33c: Visitor opinions on the statement "As a pedestrian in Salisbury, I felt quite safe from the traffic"

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	647	605	582	19 historic towns	52 destinations
Mean	3.85	4.11	3.86	4.03	4.03
Disagree strongly	3%	1%	<0.5%	1% (Max 2%)	1% (Max 16%)
Disagree	8%	4%	5%	5%	5%
Neither/nor	12%	11%	4%	10%	11%
Agree	57%	52%	88%	60%	55%
Agree strongly	20%	32%	2%	25% (Max 49%)	28% (Max 60%)

6.13 THE TOURIST INFORMATION CENTRE

The tourist information centre (TIC) received some of the highest scores achieved of all the aspects covered by the survey. A relatively high proportion of visitors surveyed in 2004 had been into Salisbury TIC, however, when comparing results with averages for other destinations, it should be kept in mind that some destination results are based on relatively small sample sizes.

As shown in Figure 19 (overleaf), the average score for ease of finding the TIC was similar to that achieved in 2002, and well above the average for 'historic towns' and 'all destinations'. 90% of respondents rated this as 'good' or 'very good' however a small number of visitors (n=10) indicated that they had some difficulty finding the TIC.

Table 34a: Visitor opinions on ease of finding the TIC

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	60	102	173	19 historic towns	53 destinations
Mean	4.22	4.33	4.32	4.10	4.12
Very poor	0%	1%	-	1% (Max 5%)	3% (Max 29%)
Poor	5%	5%	6%	6%	6%
Average	8%	7%	5%	10%	9%
Good	47%	34%	41%	46%	41%
Very good	40%	53%	49%	36% (Max 62%)	41% (Max 84%)

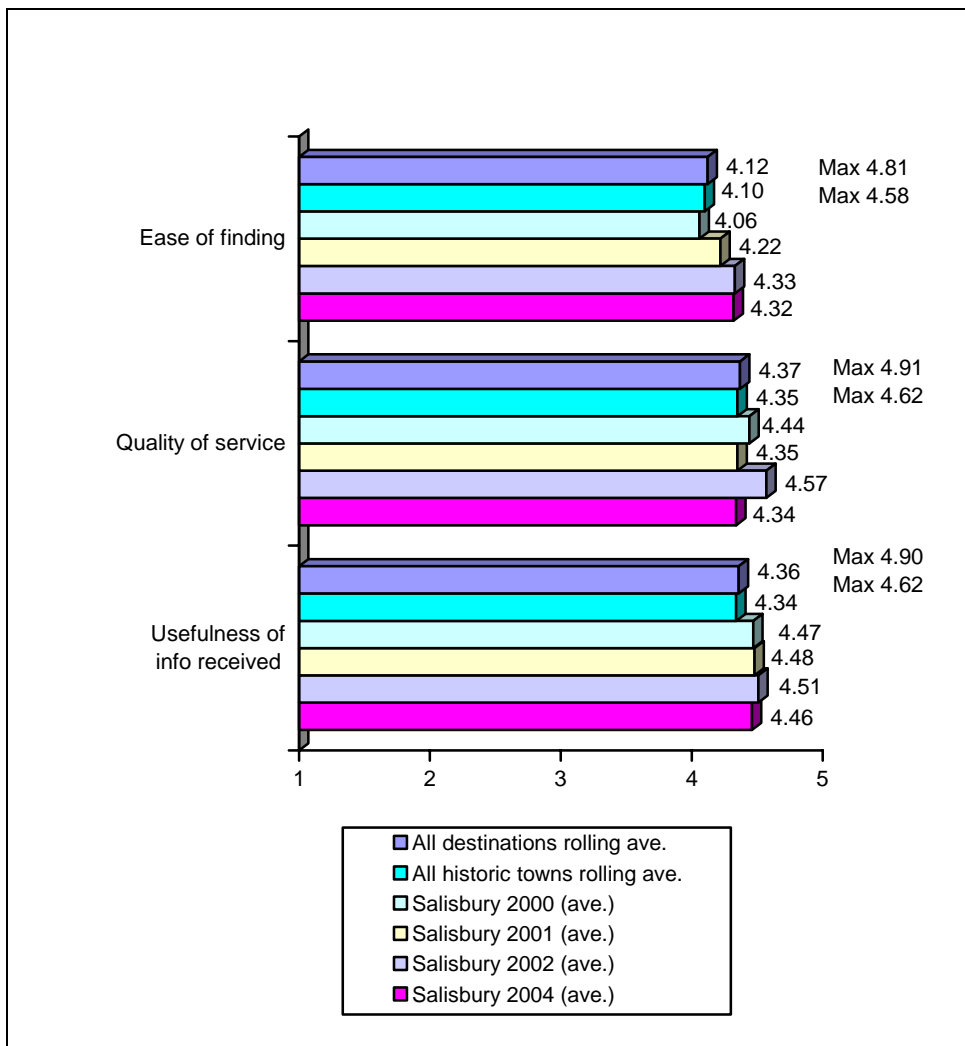


Figure 19: Opinions on the Tourist Information Centre

Where 1='Very poor', 2='Poor', 3='Average', 4='Good' and 5='Very Good'

The quality of service in the TIC was highly rated with an average score of 4.34, comparable with the average for 'historic towns' and 'all destinations' but slightly lower than the average achieved in 2002. 94% of respondents who visited the TIC rated this aspect of their visit as 'good' or 'very good'.

Table 34b: Visitor opinions on the quality of service in the TIC

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	54	95	160	19 historic towns	53 destinations
Mean	4.35	4.57	4.34	4.35	4.37
Very poor	2%	0%	-	0% (Max 3%)	1% (Max 11%)
Poor	2%	0%	3%	1%	1%
Average	4%	7%	3%	9%	9%
Good	44%	28%	50%	41%	39%
Very good	48%	64%	44%	48% (Max 71%)	51% (Max 91%)

The usefulness of information received from the TIC was also highly rated. 93% of respondents rated this as 'good' or 'very good'. The results for 2004 were comparable with 2002 and previous years, and above the averages for 'historic towns' and 'all destinations'.

Table 34c: Visitor opinions on the usefulness of information received in the TIC

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	58	101	168	19 historic towns	53 destinations
Mean	4.48	4.51	4.46	4.34	4.36
Very poor	0%	1%	-	1% (Max 8%)	3% (Max 11%)
Poor	2%	4%	3%	2%	7%
Average	2%	3%	4%	8%	38%
Good	43%	27%	38%	40%	52%
Very good	53%	65%	55%	49% (Max 71%)	67% (Max 91%)

6.14 OVERALL ENJOYMENT OF VISIT & LIKELIHOOD OF RECOMMENDING

Visitors were asked to rate the overall enjoyment of their visit. As shown in Figure 20, overall enjoyment was slightly higher than in 2002 and 2001, and broadly comparable with the averages for 'historic towns' and 'all destinations'.

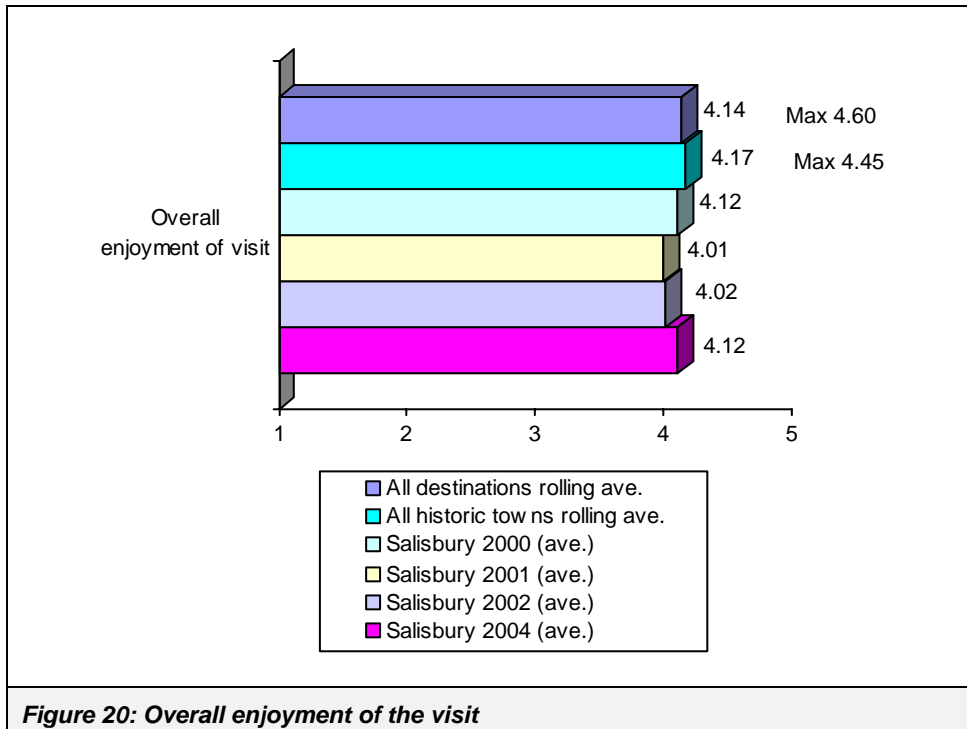


Figure 20: Overall enjoyment of the visit

Where 1='Very low', 2='Low', 3='Average', 4='High' and 5='Very High'

82% of all visitors to Salisbury rated the overall enjoyment of their visit as 'high' or 'very high' (compared with 80% in 2002 and 77% in 2001) and only one respondent rated the overall enjoyment of their visit as 'low' (Table 35).

Table 35: Visitor opinions on overall enjoyment of the visit

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	642	580	557	19 historic towns	55 destinations
Mean	4.01	4.02	4.12	4.17	4.14
Very low	0%	-	-	0% (Max 1%)	0% (Max 1%)
Low	0%	1%	<0.5%	0%	1%
Average	22%	19%	18%	15%	16%
High	53%	57%	52%	51%	52%
Very high	24%	23%	30%	33% (Max 49%)	32% (Max 65%)

In terms of the likelihood of recommending Salisbury as a visitor destination to others, the vast majority of respondents (96%) indicated that they were 'likely' or 'very likely' to recommend Salisbury. The average

score achieved was slightly lower than in 2002 and 2001 (Figure 21 & Table 36) and slightly below the average for 'historic towns'.

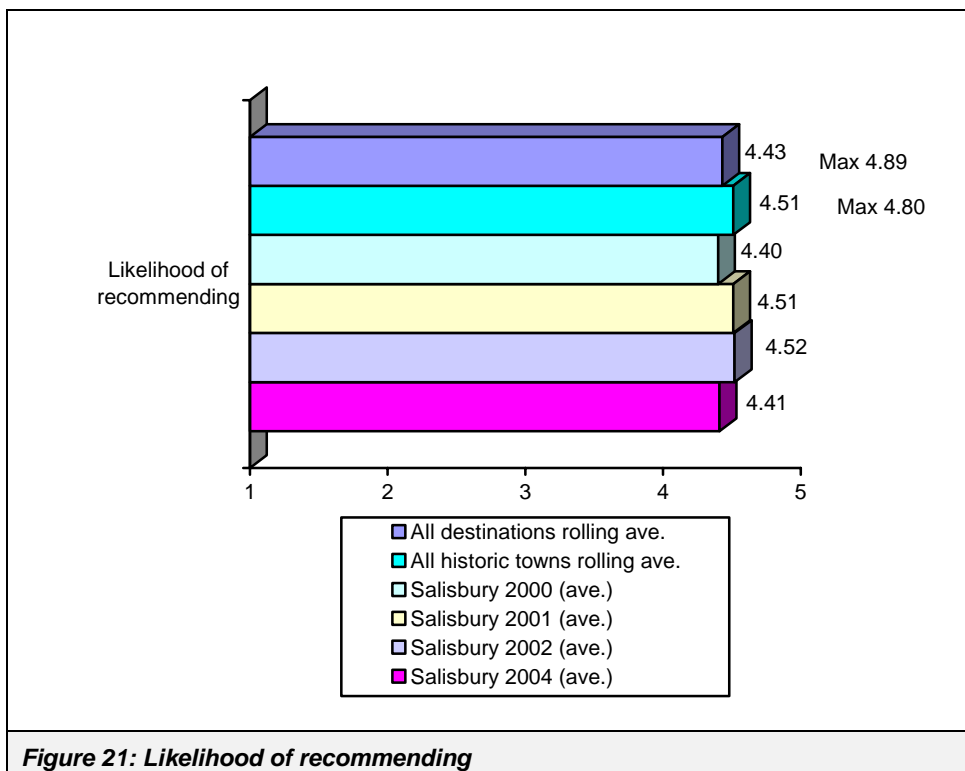


Figure 21: Likelihood of recommending

Where 1='Very unlikely', 2='Unlikely', 3='Neither/nor', 4='Likely' and 5='Very Likely'

Table 36: Visitor opinions on likelihood of recommending

	Salisbury 2001	Salisbury 2002	Salisbury 2004	All Historic Towns	All Destinations
Base	643	610	563	19 historic towns	54 destinations
Mean	4.51	4.52	4.41	4.51	4.43
Very unlikely	0%	0%	-	0% (Max 2%)	1% (Max 6%)
Unlikely	1%	0%	2%	1%	2%
Neither/nor	7%	4%	2%	7%	8%
Likely	33%	38%	51%	32%	31%
Very likely	59%	58%	45%	60% (Max 82%)	58% (Max 92%)

Reasons given by the nine respondents who were 'unlikely' to recommend Salisbury are listed below:

Prefer Brighton

Prefer shopping in Yeovil

There are better places to go

Planning department have over the years spoilt many parts of the town

Filthy toilets in Market Square, needles in the Coach Park toilets

Expensive for OAPs

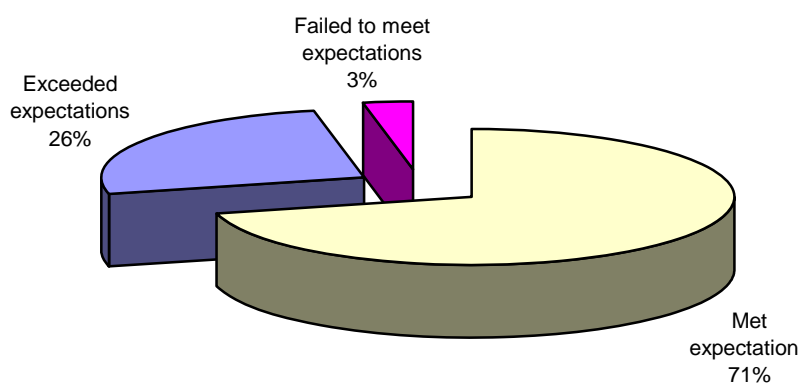
Don't know/ no specific reason/ no response (x3)

6.15 WHETHER THE VISIT MET EXPECTATIONS

Visitors were asked to say whether the visit met their expectations. A small number of visitors felt unable to comment or stated that they had no expectation of the City prior to their visit.

Overall, 70% of visitors indicated that the visit had met their expectations and a further 26% indicated that the visit had exceeded their expectations. Only 3% of respondents said that the visit had failed to meet their expectations.

Figure 22: Whether the visit met expectations



Results by visitor type are shown in Table 37, below.

Table 37: Whether the visit met expectations

	Day visitors from home	Day visitors on holiday	Staying Visitors	First time visitors	Repeat visitors	Domestic visitors	Overseas visitors
Base:	206	221	153	262	318	397	183
Met expectations	80%	65%	68%	61%	80%	74%	66%
Exceeded expectations	15%	34%	29%	37%	17%	23%	33%
Failed to meet expectations	5%	1%	3%	2%	3%	3%	1%

6.16 PARTICULAR LIKES ABOUT SALISBURY

Visitors were asked to say what they liked most about Salisbury. A full list of responses is provided in Appendix 2. The most frequently mentioned responses are listed below:

- *The cathedral*
- *History/ historic aspects of the city/ medieval streets/ olde worlde*
- *The buildings and architecture*
- *The ambience or atmosphere of a cathedral city*
- *Cathedral Close*
- *The shops/ good shopping*
- *Relaxed/ peaceful/ restful place*
- *Compact/ not too big/ good layout/ everything within walking distance*
- *The variety of shops/ small shops/ interesting shops*
- *Attractive/ picturesque/ beautiful/ quaint*
- *Good pedestrian walkways/ areas*
- *Green/ trees/ parks/ gardens/ flowers*
- *Friendly locals*
- *The streets/ narrow streets*
- *The character/ charm of the place*
- *Lots to see & do*
- *Somewhere different to go/ a change of scenery*
- *The River*
- *Stonehenge*
- *The market*
- *Unspoilt/ not too commercialised*

6.17 ANYTHING THAT SPOILT THE VISIT

The majority of respondents (80%) said that 'nothing' had spoilt their visit to Salisbury. The most frequently mentioned factors highlighted by other respondents are listed below:

- *The weather (rain)*
- *Traffic / traffic congestion*
- *Vagrants sitting outside the Guildhall*
- *Poor/ unreliable public transport*
- *Litter (particularly around the cathedral grounds)*
- *Poor sign-posting for Stonehenge*
- *Lack of signs to the city centre from the car parks*
- *Wasps*
- *Litter & rubbish in the River*
- *Difficulty parking*

A full list of responses is provided in Appendix 3.

6.18 PRIORITY INDICATORS

It is widely acknowledged that a broad variety of factors combine to make up the 'visitor experience', and therefore have a role to play in visitor satisfaction. However, benchmarking analysis demonstrates that it is possible to score highly on many indicators, and yet not necessarily achieve a high satisfaction score on the overall enjoyment of the visit. Clearly there are some indicators which have a greater role to play in driving visitor satisfaction, and there are benefits in being able to identify which indicators are of greatest importance to visitors.

With limited resources available to tackle aspects of poor performance identified within destinations, focusing action and resources on those of greatest importance is likely to have maximum impact on improving satisfaction levels. Similarly, identifying those indicators which are most important to visitors and which the destination scores well on enables the strengths of the destination to be highlighted to potential visitors through marketing and PR.

Additional supporting research into visitor priorities carried out in 1998 reinforced the view that a very wide range of factors contribute to visitor satisfaction within tourist destinations. A total of 80 unprompted factors were identified, ranging from general to very specific aspects of the destination, the majority of which are covered by the indicators currently being used. When prompted, very few of the satisfaction factors being tested were of no importance to the visitors.

The top ten indicators of greatest importance to visitors for 'all destinations' and 'historic towns' are listed below:

All destinations⁷

- Cleanliness of streets
- General appearance
- Range of places to visit
- Range of shops
- Ease of finding car parking
- Cleanliness of public toilets
- Range of places to eat & drink
- Availability of public toilets
- Feeling of welcome
- Quality of the shopping environment

Historic Towns⁸

- Cleanliness of streets
- Range of places to visit
- General appearance
- Range of shops
- Ease of finding car parking
- Feeling of welcome
- Quality of the shopping environment
- Lack of overcrowding
- Range of places to eat & drink
- Lack of traffic congestion

For 2004, in order to assess priority indicators specifically relating to visitors to Salisbury, all interviewees taking part in the survey were invited to say which aspects they considered to be most important to them (up to three responses were permitted). The question was asked at a stage in the questionnaire when the respondent had previously been asked about their satisfaction relating to indicators including attractions and places to visit, places to eat & drink, shops, ease of finding their way around, public toilets, cleanliness of streets, upkeep of parks & open spaces and overall impression of the city. The only indicators not previously

⁷ Based on interviews carried out among visitors to Bournemouth, Winchester & Southampton

⁸ Based on interviews carried out among visitors to Winchester

mentioned included overcrowding, feeling of safety from crime & traffic and aspects relating to the Tourist Information Centre.

Although the question wording was intended to ascertain the importance of the various satisfaction indicators to the visitor, the responses obtained indicate the diverse range of factors which are important to visitors to Salisbury (Table 38).

Table 38: Which aspects do you consider to be most important to you

	All mentions		First response		Second response		Third response	
Base	577		577		577		577	
No reply			-		247	42.8%	443	76.8%
Cleanliness (of streets)	123	21.3%	80	13.9%	34	5.9%	9	1.6%
General atmosphere	114	19.8%	78	13.5%	30	5.2%	6	1.0%
(Range of) Attractions & places to visit	98	17.0%	70	12.1%	20	3.5%	8	1.4%
Feeling of welcome/ Friendliness/ friendly people	90	15.6%	49	8.5%	34	5.9%	7	1.2%
Range of shops	59	10.2%	33	5.7%	17	2.9%	9	1.6%
Good signposting/ ease of finding your way around	49	8.5%	25	4.3%	17	2.9%	7	1.2%
Historic sites/ buildings/ cathedral	42	7.3%	33	5.7%	7	1.2%	2	0.3%
Adequate parking/ ease of parking	40	6.9%	18	3.1%	14	2.4%	8	1.4%
Range of places to eat & drink	32	5.5%	9	1.6%	15	2.6%	8	1.4%
Good shopping environment	27	4.7%	11	1.9%	13	2.3%	3	0.5%
Ease of accessibility	26	4.5%	15	2.6%	6	1.0%	5	0.9%
Everything is important	21	3.6%	21	3.6%	-	-	-	-
Character of the city/ overall impression	20	3.5%	7	1.2%	9	1.6%	4	0.7%
Upkeep of parks & open spaces	17	2.9%	5	0.9%	6	1.0%	6	1.0%
Toilets (generally)	16	2.8%	10	1.7%	5	0.9%	1	0.2%
Value for money	13	2.3%	9	1.6%	3	0.5%	1	0.2%
Places to sit down & rest	13	2.3%	1	0.2%	9	1.6%	3	0.5%
Pedestrian walkways/ traffic-free areas	13	2.3%	6	1.0%	7	1.2%	-	-
Politeness of people generally	12	2.1%	3	0.5%	8	1.4%	1	0.2%
Accessibility (particularly for elderly/disabled)	12	2.1%	7	1.2%	2	0.3%	3	0.5%
Availability of information (generally)	11	1.9%	4	0.7%	4	0.7%	3	0.5%
Safety	10	1.7%	6	1.0%	2	0.3%	2	0.3%
Relaxing	10	1.7%	8	1.4%	1	0.2%	1	0.2%
Compactness for walking	9	1.6%	5	0.9%	3	0.5%	1	0.2%
Quality of service (generally)	9	1.6%	2	0.3%	4	0.7%	3	0.5%
Architecture	9	1.6%	7	1.2%	-	-	2	0.3%
Nice restaurants	9	1.6%	3	0.5%	4	0.7%	2	0.3%
Facilities	7	1.2%	1	0.2%	3	0.5%	3	0.5%
Everything centrally located/ good layout	7	1.2%	4	0.7%	3	0.5%	-	-
Caters for visitors & makes visiting easy for them	7	1.2%	3	0.5%	4	0.7%	-	-
General appearance/ presentation	5	0.9%	2	0.3%	1	0.2%	2	0.3%
Cultural aspects	5	0.9%	3	0.5%	2	0.3%	-	-
Uniqueness	5	0.9%	3	0.5%	1	0.2%	1	0.2%
Uncrowded/ not too busy	5	0.9%	2	0.3%	1	0.2%	2	0.3%
Good Tourist Information Centre	5	0.9%	1	0.2%	3	0.5%	1	0.2%
Good pubs	5	0.9%	2	0.3%	1	0.2%	2	0.3%
Quality of attractions & places to visit	4	0.7%	3	0.5%	1	0.2%	-	-
Community as a whole	4	0.7%	3	0.5%	1	0.2%	-	-
Good nightlife	3	0.5%	1	0.2%	1	0.2%	1	0.2%

The Tourist Information Centre	3	0.5%	-	-	2	0.3%	1	0.2%
Good market	3	0.5%	1	0.2%	-	-	2	0.3%
Map/ info available outside TIC opening hours	3	0.5%	1	0.2%	1	0.2%	1	0.2%
No jobs	3	0.5%	1	0.2%	2	0.3%	-	-
Nice tea shops	3	0.5%	1	0.2%	2	0.3%	-	-
Service in shops	2	0.3%	-	-	2	0.3%	-	-
Lively town	2	0.3%	1	0.2%	1	0.2%	-	-
Unspoilt	2	0.3%	2	0.3%	-	-	-	-
Comfort	2	0.3%	-	-	-	-	2	0.3%
A good base for touring	2	0.3%	1	0.2%	1	0.2%	-	-
Cheap places to eat	2	0.3%	-	-	1	0.2%	1	0.2%
Good/nice accommodation	2	0.3%	-	-	1	0.2%	1	0.2%
Public transport into the City Centre & elsewhere	2	0.3%	1	0.2%	1	0.2%	-	-
Street entertainment	2	0.3%	1	0.2%	-	-	1	0.2%
Public transport	2	0.3%	-	-	2	0.3%	-	-
Easy access to the City by road	2	0.3%	1	0.2%	1	0.2%	-	-
Good views/ scenery	2	0.3%	1	0.2%	1	0.2%	-	-
Not too much traffic	2	0.3%	-	-	2	0.3%	-	-
Lots of open spaces	2	0.3%	1	0.2%	1	0.2%	-	-
Parking close to the City Centre	2	0.3%	-	-	1	0.2%	1	0.2%
Cost of parking reasonable	2	0.3%	-	-	2	0.3%	-	-
Free parking	2	0.3%	1	0.2%	1	0.2%	-	-
Helpful restaurant staff	1	0.2%	1	0.2%	-	-	-	-
Baby changing facilities	1	0.2%	-	-	1	0.2%	-	-
Location of places to eat & drink	1	0.2%	1	0.2%	-	-	-	-
Litter bins	1	0.2%	-	-	-	-	1	0.2%
Greenery	1	0.2%	-	-	1	0.2%	-	-
Access for cyclists	1	0.2%	-	-	-	-	1	0.2%
Accessibility for pram & pushchairs	1	0.2%	-	-	1	0.2%	-	-
Proximity to Stonehenge	1	0.2%	1	0.2%	-	-	-	-
Old buildings still in use	1	0.2%	-	-	1	0.2%	-	-
Free toilets	1	0.2%	-	-	1	0.2%	-	-
Late night shopping	1	0.2%	1	0.2%	-	-	-	-
Things for children to do	1	0.2%	-	-	-	-	1	0.2%
Standard of upkeep generally	1	0.2%	-	-	1	0.2%	-	-
A little sophistication	1	0.2%	-	-	1	0.2%	-	-
Wildlife - birds	1	0.2%	1	0.2%	-	-	-	-
Reasonable parking charges	1	0.2%	-	-	1	0.2%	-	-
Cheap accommodation	1	0.2%	1	0.2%	-	-	-	-
Good transport connections	1	0.2%	-	-	-	-	1	0.2%
Park & Ride scheme	1	0.2%	1	0.2%	-	-	-	-
Moderate price range restaurants	1	0.2%	-	-	1	0.2%	-	-
Extended opening hours on Bank Holidays	1	0.2%	-	-	-	-	1	0.2%
Free tourist attractions	1	0.2%	1	0.2%	-	-	-	-
Charity shops	1	0.2%	1	0.2%	-	-	-	-
No layabouts	1	0.2%	-	-	-	-	1	0.2%
Variety	1	0.2%	1	0.2%	-	-	-	-
River walks	1	0.2%	-	-	-	-	1	0.2%

Overall, however, the responses obtained in Salisbury are reasonably consistent with those obtained in the previous study. A comparison of the satisfaction indicators most frequently mentioned as being important to the visitor in each survey is presented overleaf. Aspects such as historic sites, buildings or the cathedral mentioned frequently by Salisbury visitors have been omitted from the comparison.

Historic Towns

- Cleanliness of streets
- Range of places to visit
- General appearance
- Range of shops
- Ease of finding car parking
- Feeling of welcome
- Quality of the shopping environment
- Lack of overcrowding
- Range of places to eat & drink
- Lack of traffic congestion

Salisbury 2004

- Cleanliness of streets
- General atmosphere
- Range of attractions & places to visit
- Feeling of welcome (friendliness)
- Range of shops
- Ease of finding your way around/ Good signposting
- Ease of parking
- Range of places to eat & drink
- Quality of the shopping environment
- Character of the city/ overall impression
- Upkeep of parks & open spaces
- Toilets (generally)

The 1998 study produced frequency scores for the indicators based on their selection by visitors as being of relative importance to other indicators. A series of rankings were derived from this using a 1-5 scale where 5 = 'very important', 4 = 'important', 3 = 'quite important', 2 = 'not very important' and 1 = 'relatively unimportant'.

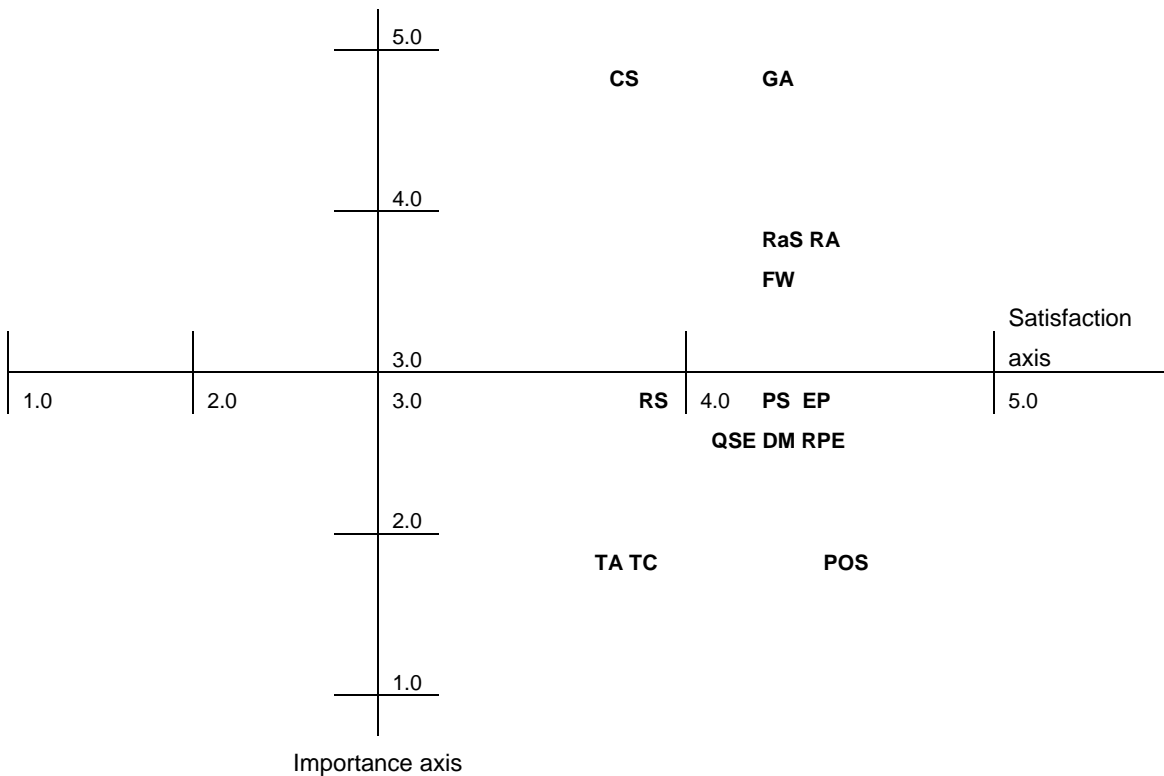
A similar method has been used to rank the 2004 Salisbury data, except that since respondents were limited to three responses and a wider range of responses were received the ranking bands have had to be adjusted accordingly. Indicators mentioned by less than 3% of all respondents have been assumed to be of low importance.

	Salisbury 2004
Rank 5 Very important (20%+ of visitors)	<ul style="list-style-type: none"> • Cleanliness of streets • General atmosphere
Rank 4 Important (10-20% of visitors)	<ul style="list-style-type: none"> • Range of attractions & places to visit • Feeling of welcome • Range of shops • The cathedral & historic aspects of the city
Rank 3 Quite important (5-10% of visitors)	<ul style="list-style-type: none"> • Ease of finding way around (road signs, pedestrian signs, Display maps & info boards) • Ease of parking • Range of places to eat & drink • Quality of the shopping environment
Rank 2 Not very important (3-5% of visitors)	<ul style="list-style-type: none"> • Upkeep of parks & open spaces • Toilets generally (availability & cleanliness)
Rank 1 Relatively unimportant (<3% of visitors)	<ul style="list-style-type: none"> • All other indicators

Ranking the indicators in this way (albeit on a smaller scale) enables satisfaction scores to be analysed in terms of their importance to visitors and the relative need for improvement to be assessed.

On the whole, Salisbury achieved relatively high satisfaction scores ('good' to 'very good' or 4.0 to 5.0) for most indicators which were perceived to be of relatively high importance to visitors.

The cleanliness of streets (CS on the grid) shows the greatest need for improvement, since this was relatively high on the importance scale (rank 5) but only 'average' to 'good' (3.89) in terms of visitor satisfaction. The availability and cleanliness of public toilets (TA and TC respectively on the grid) achieved relatively low scores in terms of visitor satisfaction but were ranked as being relatively unimportant to visitors and are therefore not so critical in terms of need for improvement.



Key:

- CS** Cleanliness of streets (3.89)
- GA** General atmosphere (4.31)
- RA** Range of attractions & places to visit (4.22)
- FW** Feeling of welcome (4.25)
- RaS** Range of shops (4.19)
- RS** Road signs (3.90)
- PS** Pedestrian signs (4.21)
- DM** Display maps & information boards (4.19)
- EP** Ease of parking (4.24)
- RPE** Range of places to eat & drink (4.22)
- QSE** Quality of shopping environment (4.17)
- POS** Upkeep of parks & open spaces (4.46)
- TA** Availability of public toilets (3.74)
- TC** Cleanliness of public toilets (3.87)

Salisbury scored 'good' or 'very good' in terms of visitor satisfaction for the following indicators which are 'important' (rank 4) or 'very important' (rank 5) to visitors to Salisbury namely;

- General atmosphere (4.31)
- Range of attractions & places to visit (4.22)
- Feeling of welcome (4.25)
- Range of shops (4.19)

These are aspects of the city which should be highlighted in any PR or marketing activity, along with the cathedral and 'historic' aspects of the city which were also ranked as 'important'.

Most aspects ranked as 'quite important' (rank 3) also achieved scores of 4.00 or higher ('good' to 'very good'):

- Ease of finding your way around (pedestrian signs 4.21, display maps & info boards 4.19)
- Ease of parking (4.24)
- Range of places to eat & drink (4.22)
- Quality of the shopping environment (4.17)

The areas which show greatest need for attention are the indicators below which are 'quite important' (rank 3) to 'very important' (rank 5) to visitors but where Salisbury has scored only 'average' to 'good' in terms of visitor satisfaction;

- Cleanliness of streets (3.89)
- Road signs (3.90)