



Request for Quotation

Salisbury Visitor and Non Visitor Research

Issue Date: Monday 13 January 2020

Return Date: Monday 27 January 2020

1. Background

The Salisbury Marketing Group, comprised of key stakeholders including Salisbury City Council, Salisbury BID, Wiltshire Council and Wiltshire Tourism¹ are seeking to develop insights in order to support Salisbury's bid to the Future High Street Fund and to inform the future development of Salisbury's offer to leisure visitors.

In 2018 the city was struck by a nerve agent attack that resulted in the death of one person and the closure of a significant part of the high street for 11 weeks. The associated publicity resulted in visitors and footfall in the city dropping significantly.

It is clear that, aside from an immediate negative impact on footfall and visitors, (footfall to the city centre decreased by 11% as compared to a national average decline of 4.9%), the nerve agent attacks of 2018 have exacerbated pre-existing challenges faced by the city in terms of attracting footfall from Salisbury's resident and catchment area and tourism visitors from beyond its catchment.

We know from existing research that Salisbury faces a number of challenges in attracting footfall from residents within its retail catchment area. The retail offer has not evolved with national changes to high street spending and behaviour and Salisbury competes with nearby out of town retail offers as well as with other nearby towns and of course, with online shopping. Even before the attacks, by 2017/18 Salisbury retained only 30.8% of its catchment area spend, with significant leakage to the nearby towns of Andover and Southampton.

Although every year from 2013 – 2017 was a record year for Salisbury's tourism visitor economy, there is a strong sense that Salisbury is underperforming in relation to tourism destinations within its competitive set.

Whilst individual partners have carried out research across specific areas, the last time there was budget for a full Salisbury visitor survey was 10 years ago .

The results of this new research are expected to provide insight that will help increase visits and spend, secure additional investment, and help the city reach its full potential as a visitor destination. It is hoped that this will be the first in a series of visitor surveys.

¹ Salisbury Marketing Group is comprised of: Salisbury BID, Salisbury City Council, Swindon and Wiltshire LEP, VisitWiltshire, Wiltshire Council, Salisbury Cathedral, Salisbury Chamber of Commerce, Salisbury Journal, Salisbury Purple Flag/Night-time Economy Group.

1.1 Known challenges

Previous research and insights point to a number of common challenges and opportunities for the city in maximising return from both catchment and tourism visitors. These include:

- The opportunity to maximise dwell times, repeat visits and spend.
- An over-dependence upon the Cathedral as a main attractor and missing attractors, which are well represented in competing destinations.
- The opportunity to maximise the potential of Salisbury's proximity to Stonehenge (encouraging more travel trade and independent Stonehenge visitors to visit Salisbury or to extend their stay in Salisbury beyond a visit to the cathedral.)
- A need to address signage and wayfinding in order to improve navigation around the city and visitor flow from the cathedral and cathedral close outward into the city.
- A need to improve the sense of vibrancy in the city, particularly within the night time economy and early evening economy
- A lack of appropriate accommodation stock to meet the needs of the tourism target market
- The need to develop and articulate a point of difference to enable the city to compete with alternative destinations

1.2 Future Plans

In the wake of the events of 2018 a number of partners are now working closely together in order to address these challenges. A year-long programme of events and activities throughout 2020 marks the 800th anniversary of the laying of Salisbury Cathedral's first foundation stone and the development of the city.

In 2019 a new competitive brand positioning was developed for the city which articulates an ambition for the future of the city and a unique consumer positioning to direct development of the offer.

A Place Board has been established and a joint marketing group will be tasked with delivering a marketing strategy for the city.

Wiltshire Council have bid for capital funding for the city through the Future High Streets Fund and have identified a number of outline initiatives to improve aspects of the offer.

These initiatives include: improvements to public realm and wayfinding to aid visitor flows and improve visitor experience, the creation of an artisan arcade and cultural quarter, creation of heritage trails and an ambitious project to create a new illumination attraction.

2. Request for Quotation – Services Required

2.1. Scope of work required/research objectives

In overall strategic terms, the core purpose of this work is to support Salisbury's bid for Future High Street funding; increasing our understanding of how the Salisbury visitor offer needs to change and develop in order to maximise the economic return from existing visitors, encourage repeat visits and increase overall visits. Within this, we would like to generate evidence of the likely visitor impact of the specific proposed initiatives within the High Street bid (see appendix 2 for more detail). Ideally insights should include quantifiable and qualitative elements to support the initiatives within the bid.

In addition we would like to ensure that insights have wider application in informing the development of a city marketing strategy; including informing segment targeting, etc.

Although individual partners have conducted research relating to their own business areas, Salisbury does not have an ongoing visitor survey and it would be beneficial for this work to establish a baseline detailing the current leisure visitor profile and experience, against which to measure the impact of forthcoming tourism/ leisure developments in the city.

Please note that whilst the timescale for this project is to be complete by end April 2020, there may be an opportunity to undertake an update to the initial research in summer 2020 subject to funding.

2.2. Visitor definition and scope

We are primarily interested in knowing more about the behaviour, perceptions and motivations and about experience/satisfaction levels of:

- Tourism day visitors (see definition in appendix 1) from within a three hour drive time.
- Tourism staying visitors (see definition in appendix 1)
- International visitors who may include Salisbury as part of their UK itinerary either for a day or overnight visit.

We are also keen to understand the perceptions of **non-visitors** / **lapsed visitors** in the above groups (in the case of staying visitors, particularly those from within a 3 hour drive time.).

(We are aware that the above scope is ambitious within the constraints of this research. Please see section 3.1 on presenting costs.)

In addition, as a potential addition to this project, we would be interested in gaining insight on leisure day visits from Salisbury city residents (see definition in appendix 1). Please outline inclusion of this group as a separate costed area within your proposal.

2.3 Desired Insights

The insights delivered must meet the objectives outlined in section 2.1. In specific terms we have outlined a suggested 'wish list' of desired insight and question areas below.

Visitor Profile and behaviour

Who is currently visiting Salisbury city centre?

Visitor characteristics (including socio-economic data)

Trip characteristics – size, composition, method of transport, etc

Characteristics of the visit? (spend, activities, length of stay/dwell time, etc)

Who's visiting / not visiting at different times of year. What differences in behaviour are there across the year?

What prompts visits?/ Primary motivation

Visitor Satisfaction

How satisfied are current visitors with their experience of the city and of specific elements of the experience? (A list of elements to be agreed, e.g. range and quality of accommodation, shopping, leisure activity and events, eating out, ease of access and navigation, etc)

How does Salisbury rank against competitor destinations in terms of visit preference and why? (Competitive set to be agreed – will vary by visitor and trip characteristic.)

How should the offer change to encourage frequency, higher spend, longer dwell-time/stay? In particular we would like to gain feedback on the nature of the proposed developments outlined in appendix 2, but we would also like to capture unprompted responses to this.

How likely are all groups to recommend Salisbury as a place to visit?

Non-visitor perceptions

Why are non-visitors, in particular those within the following specific groups not visiting Salisbury:

Tourism day and staying visitors, from within 3 hour travel time (those already aware of the destination)

Independent travellers, including international visitors, visiting Stonehenge via Salisbury Railway Station or using private transport. Nb. It will be possible to use Wiltshire Council resource to conduct a survey onboard the Stonehenge bus

Information sources

How are residents/visitors finding out about and accessing pre visit information, e.g. on events, activities, etc.?

2.4. Deliverables

Agreeing methodology
Agreeing sampling approach
Agreeing survey locations
Agreeing questions for the survey
Appropriate training of survey team
Pilot/ testing of survey
Collection of data
Data analysis using professional statistical analysis software
Completed research project
Questionnaire/ questions to be used for repeat surveys
Report (full, plus executive summary)
Powerpoint Presentation
Ownership/ control of data. We will want to share this data with our partners and use it for future research/surveys.
Minimum 2 presentations to stakeholder groups

2.5 Timescale

We anticipate appointing an agency on 3 February. Interim headline results (to be agreed on appointment) to be available end March 2020.

All work to be completed and report available by 31 April 2020

2.6. Selection Criteria

We will be considering both the proposed fee and the quality of the proposal in making our selection and the evaluation criteria for this commission is set out below.

	Criteria	Maximum Score
A	Cost/value added	10
B	Company Experience - Ability to deliver the objectives in the brief; demonstrating how previous experience will be used; ability to innovate; experience of collaborative working processes.	10
C	Technical merit of proposal – understanding of the brief; method and approach; completeness of services offered. Demonstrating how the methodology will meet the insight aspirations of Salisbury partners. We would welcome innovative methods to ensure the degree of relevant data and sample sizes are maximised.	10
D	Staff and other resources - experience of the project lead; allocation of staff to ensure objectives are met; ability to meet programme; experience of working together as a team; project management structures; balance of skills.	10
E	Programme – is a sensible timescale proposed; do the proposals complement the stated requirements.	10

3. Quote submission

Your Quotation should include the following:

3.1 Cost

The budget for this piece of work will be in the range of £20-25k.

Costs should be broken down into components with a full description of each component and its associated costs.

It would be helpful to separately cost on a menu type basis, how each of the separate visitor groups would be included, to enable us to make choices for inclusion in the final agreed brief with the appointed agency.

Please include day rates and allocation of days for each member of staff involved with the project and total time costs.

Please note that Wiltshire Council can provide some limited resources to assist in undertaking research.

3.2 Company Details

Include full company details including company name, registered office address, registration number. If the company is a member of a group of companies, give the name and address of the ultimate holding company.

Bidders must confirm if all or part of the work will be contracted to a 3rd party. Actual or perceived conflicts of interest must be declared.

Please include full contact details of the person to whom any queries relating to this Quotation should be addressed.

3.3 Experience

Please provide:

- A brief history of the company and its evolution
- An overview of the range of services that the company supports
- Details of relevant experience the company and consultants have
- CVs of the key consultants that you are proposing to commit to this contract should it be awarded to your company
- Details of the qualifications of the consultants who would be working on this contract
- The Company names, contact names and contact details of referees from whom references may be sought

3.4 Assumptions

Please detail the assumptions that have been made about the management of, and input to, this piece of work, including time commitment.

3.5 Methodology and Project Plan

Your proposal should show clearly how your organisation would meet the needs and requirements of the brief.

Please propose an appropriate methodology mix to meet the insight requirements and include a proposed project plan. The project plan should include resourcing, timescales, milestones and reporting.

Note that we are able to draw on volunteer interviewers where appropriate for face to face surveying. Your proposal should detail how you would maximise value for money by using this resource whilst ensuring robust results.

Selective consumer data may be available from partner organisations for re-contact purposes where appropriate permissions have been put in place.

Sampling approach and criteria – please advise on sampling approach (in context of the requirement for multiple locations/ dates, in order to get a clearer understanding of the visitor profile).

Sample size - Please advise on appropriate statistically significant sample size.

Advise on how best to achieve comparable data to enable benchmarking with similar destinations in the south west, and other heritage destinations in the UK.

3.6 Any Other Information

You may include any other information which you consider may be relevant to support your submission.

3.7. Instructions for Completion:

- Quotations are to be sent by email to amandasnowe@visitwiltshire.co.uk
- No quotation received after the stated submission date specified and / or provided other than in accordance with these instructions shall be accepted or considered. Once the proposal has been submitted, no alterations to the text will be permitted.
- Your quotation will remain open for 30 days from the submission date. VisitWiltshire reserve the right to award the contract at such or at a later date, or not at all.
- VisitWiltshire does not bind itself to accept the lowest bid or any quotation. VisitWiltshire reserves the right to withdraw any part of the quotation document prior to award of contract, and reserves the right to discontinue the quotation process at any time. VisitWiltshire will not accept responsibility for any expense or loss which may be incurred by any potential supplier in the preparation of their Quotation.
- Quotations will be evaluated by a Salisbury Brand Positioning Project Panel consisting of funding partners and independent experts and stakeholders.
- The contract will be subject to VisitWiltshire's standard terms and conditions.
- Timetable:

Opportunities for questioning the brief by telephone week beginning 13 January
Proposals submitted by close of Mon 27 Jan 2020.

Shortlisted agency interviews (if applicable) week beginning 27 Jan or 3 Feb

Agency appointment week beginning Mon 3 February

Interim headline results available end March 2020

All work to be completed and report available by 31 April 2020

- If you have any questions on this RFQ please contact:

Amanda Snowe: amandasnowe@visitwiltshire.co.uk Tel: 07891 682380

Appendix 1.

Definitions

For the purpose of this work we have aligned our definitions of research subjects to the Great Britain Tourism Survey and Day Visitor Survey conducted by VisitBritain:

Tourism Day Visit

A visit, lasting more than 3 hours from beginning to end (i.e. from leaving home to returning there), and including one or more of the activities on the list below. The participant must indicate that the visit (i.e. same activity in same place) is not undertaken 'very regularly' and the destination of the visit must be different from the place (i.e. city, town, village or London borough) where the participant lives.

Visiting friends or family for leisure

'Special' shopping for items that you do not regularly buy

Going out for a meal

Going on a night out to a bar, pub and/or club

Going out for entertainment – to a cinema, concert or theatre

Undertaking outdoor leisure activities such as walking, cycling, golf, etc.

Taking part in other leisure activities such as hobbies, evening classes, etc. (outside of your home) Taking part in sports, including exercise classes, going to the gym, etc.

Watching live sporting events (not on TV)

Going to visitor attractions such as a historic house, garden, theme park, museum, zoo, etc.

Going to special public event such as a festival, exhibition, etc.

Going to special events of a personal nature such as a wedding, graduation, christening, etc.

Going on days out to a beauty or health spa/centre, etc.

Going on general days out/to explore an area

Going on day trips/excursions for other leisure purpose not mentioned above

Tourism staying visitors

Visitors staying one night or more in the destination for leisure purposes. (i.e. excluding trips for business purposes.)

Leisure day visits of Salisbury Residents

Any trip from those living within Salisbury for one or more of the purposes above.

Appendix 2.

Proposed Initiatives

Illuminating Salisbury

The Illuminating Salisbury project will install a new, permanent major attraction in several locations in the city, anchored by major shows in Salisbury's Market Place.

High quality animated displays will form an itinerary around the city, telling its story and guiding visitors. Laser projection will be used combined with digital content to produce frequent shows, more than a one-off "festival of light". It will entice tourists and local residents to enjoy all the city has to offer at night – food, culture, entertainment and shopping.

The intention of the project is to boost the visitor economy into the evenings making Salisbury a must-see heritage destination city across the year

Improvements to public realm and visitor arrival experience

A transformational redevelopment of the Salisbury Railway Station forecourt to deliver a greatly enhanced arrival experience for visitors to the city. The intention is to redesign the area away from being dominated by car parking (albeit sufficient car parking will be integral to the project), in favour of creating an improved experience for pedestrians using the area. The redevelopment will include a much improved bus interchange for tourists travelling onward to Stonehenge.

Fisherton Street – improvements to the function and appearance of what is the first impression of Salisbury for many people arriving to the city by train.

The proposed improvements include creation of waterside seating areas, to complement existing café culture and public art in key locations, including the Fisherton Railway Bridge, and opening up and integrating the city's cultural quarter with Fisherton Street.

Improved direction finding and information provision to visitors.

Artisan Arcade

Creation of a waterfront artisanquarter showcasing goods of local provenance.