STRATFORD-UPON-AVON TOWN CENTRE

BUSINESS SURVEY 2011

Produced by Stratford DC Consultation Unit
01789 260118
January 2012

CONTENTS

1.0 Introduction/Objectives

This report is designed to supply evidence to support identification of targeted 'Outputs' that form part of funding contracts between Advantage West Midlands, Stratford-upon-Avon District Council and Warwickshire County Council to deliver the World Class Stratford Phase 1 Programme completed in 2011.

The aim of this survey was to identify the creation of 100 and retention of 25 full time equivalent jobs directly resulting from the programme. All three parties accepted from the start that this task would present a difficult challenge to a programme designed to present the environment for economic improvement which made it essential that a methodology was agreed for this task.

To identify a base line for the targets relating to job creation and retention, Stratford-upon-Avon Town Management Partnership conducted a Town Centre Business Survey in 2007. 'The Research Solution' obtained comparable data in November 2011.

The up to date intelligence from the survey would also help us understand how businesses are performing and help to inform the District Council's emerging Business and Enterprise Strategy and Tourism Strategy.

There was a district–wide Business Survey earlier in the spring of 2011, but the information obtained from this particular survey was focused on the town centre's economic health and sustainability.

2.0 Methodology

The questionnaire was designed to evaluate the World Class Stratford programme and was supplemented by three questions for the District Council.

Stratford District Council and The Research Solution in Worcester carried out the survey. Both researchers involved had more than 20 years experience.

434 businesses were identified to be in the defined survey area which comprised of Henley Street; Guild Street; Union Street; Bridge Street; Waterside; Ely Street; Chapel Lane; Church Street; Meer Street; Arden Street; Greenhill Street; and Rother Street.

In addition, 21 businesses that were adjacent to Programme sites were sent the same questionnaire with two additional questions on job retention and creation included.

The survey was designed to be cost efficient so was split into two parts. A postal survey was sent to all 434 businesses identified in the defined area, with a follow up telephone call to those who had not replied.

On October 11th 2011, the questionnaires to the businesses were posted, apart from the 21 businesses near the Programme sites which were hand delivered. A list of World Class Stratford projects was included on the back of the covering letter which outlined the reasons for the survey.

A closing date of November 1st was given allowing a three week period in which to return them. A FREEPOST envelope was provided to encourage their response.

96 questionnaires were returned to SDC, with a further 7 questionnaires "returned to sender" for a variety of reasons.

The original survey was based on a sample of 249 responses undertaken entirely by face to face interviews with businesses in July 2007.

It was decided to telephone rather than visit these businesses, which was more economical. A target of 200 was set as this was felt to be a statistically valid sample. Knowing which businesses returned the 2007 form, efforts were concentrated on trying to obtain responses from these. The advantage was that direct comparisons could be made to the results pre World Class Stratford. In the event 80 businesses responded by post or answered questions over the telephone in both 2007 and 2011.

In total 114 successful telephone calls were made in the last two week period of November 2011, where businesses responded to the survey positively. Numerous other calls were made to businesses but these were unsuccessful. Almost all retail establishments were contacted. Therefore the survey results are based on a total sample of 214 businesses.

The aim was to match the split of respondents by type of business that was achieved in 2007. The following breakdown of responses was achieved:

Type of Business	**2007 %**	**2011 Number**	**2011 %**
Retail	62	**122**	57
Restaurants, Pubs and Catering	18	**31**	15
Property, Estate Agents, Solicitors	6	**10**	5
Banks, Building Societies, Accountants	3	**9**	4
B & Bs and Hotels	3	**10**	5
Other organisations	8	**32**	16
Base:	100	**214**	100

Location of Respondent Businesses

- Businesses adjacent to the programme sites: 8
- Other town centre businesses: 198
- Location Unidentified: 8.

3.0 Summary of Findings

- As a result of the phase 1 project of World Class Stratford, businesses adjacent to the programme sites were asked two specific extra questions regarding job creation and job retention. Five of the eight respondents answered these questions. 3 new jobs had been created in total since 2007, with 35 jobs retained in the same period.

- Between 2007 and 2011, the number of full time jobs has increased whilst the number of part time positions has decreased.

- One in five businesses are planning to increase the number of permanent staff in the next 12 months.

- Two-thirds of employees are employed from the local area (within 5 miles of Stratford).

- The restaurant and pub sectors have a slightly brighter outlook for the next 12 months. A quarter of them are intending to increase their staff numbers.

- Analysing the results for the 8 respondent businesses adjacent to the projects, 4 of them are intending to increase staff numbers in the next 12 months and 4 will look to maintain the current levels. Encouragingly here, none are looking to decrease their staff numbers.

- Three out of ten businesses adjacent to the projects felt the World Class Stratford Phase 1 projects had helped to improve trade. The restaurant and pub trade show a proportionately better response than the overall figure with almost half saying trade had improved as a result of the projects. Analysing the results for the 8 businesses specifically adjacent to the Programme sites, 6 of them felt trade had improved because of the World Class Stratford Phase 1 projects.

- There was almost an even split between those respondents that have improved their business to increase trade since 2007 against those that have not; 47% versus 53%.

- One in five businesses who responded to this question are planning to improve or expand their businesses to increase trade in the next 12 months.

- Respondents were asked how much their business turnover had gone up, down, or remained about the same compared with a year ago. 8% indicated their turnover had risen over 20% in the last twelve months, with a further 12% having a rise between 10% and 20%. A further 16% replied that their turnover saw a positive increase up to 9%. A third of respondents indicated that their business turnover had remained at the same levels as twelve months ago. Negatively, 8% had decreases of 20% or more, 9% between 10 and 20%, and 13% up to 9%.

- 44% were concerned about the cost of parking, 22% wanted improvements to the parking available, and 22% wished to see more visual improvements to the town. In terms of retail, 15% of respondents would like if possible an increase in the number of quality or specialised shops, 14% wanted better attempts to fill empty shops and 12% would like to see the redevelopment of Town Square.

- The main comment by three out of ten was the Theatre re-opening had increased trade. Just over a quarter of those responding (27%) felt that the improvements made because of World Class Stratford had made the town nicer and as a result footfall had increased. Just under one in ten (8%) felt businesses at the top end of the town do not feel the benefits as much as those at the bottom.

4.0 Results of Stratford Town Centre Business Survey 2011

4.1 As a result of the projects listed, please estimate the number of new jobs created since September 2007 and the number of jobs retained since September 2007

As a result of the phase 1 project of World Class Stratford, businesses adjacent to the World Class Stratford Programme sites were asked these two specific extra questions regarding job creation and job retention. Five of the eight answered these questions reporting that 3 new jobs had resulted from the Programme since 2007, with 35 jobs retained over the same period.

Analysing the results for the 8 businesses adjacent to the World Class Stratford Programme sites, 4 of them are intending to increase staff numbers in the next 12 months and 50% anticipate maintaining the current levels. Encouragingly here none are looking to decrease.

Of these 8 businesses, 6 of them (75%) felt trade had improved as a result of the World Class Stratford projects, one replied no and another business did not feel they could answer.

4.2 Do you think the projects have helped to improve your trade?

Businesses were given a list of the projects delivered in Stratford town from 2007 to 2011.

All Businesses

Three out of ten businesses (31%) felt the projects listed had helped to improve trade, 58% answered no, and 12% did not know.

	Number	%
Yes	64	30.8
No	120	57.7
Don't Know	24	11.5
BASE:	*(208)*	

Retail Businesses

Retail business saw slightly more indicating that trade had been improved as a result of the projects listed at 35%.

	Number	%
Yes	41	34.5
No	64	53.8
Don't Know	14	11.8
BASE:	*(119)*	

Restaurants, Pubs, etc

The restaurant and pub trade show a proportionately better response than the overall figure with almost half (47%) saying trade had improved as a result of these projects.

	Number	%
Yes	14	46.7
No	13	43.3
Don't Know	3	10.0
BASE:	*(30)*	

4.3 How many staff do you currently employ?

Total Number of Staff

211 out of the 214 responding businesses answered this question.

In 2011, 2,399 people were employed which represents an average of 11.4 employees per business.

The largest employer in the survey had 118 staff.

There were 80 businesses that completed the survey in both 2007 and 2011 and by comparing these we can see the trend in overall employment figures.

In 2007 – 1084 employed in the 80 businesses at an average of 13.6 employees per business

In 2011 – 947 employed in the 80 businesses at an average of 12.0 employees per business.

Therefore, when comparing the two years, there has been an overall drop in the total number of full and part time staff of 12%.

Full and Part Time Posts

However, more detail can be seen when comparing full time and part time posts.

In 2007, 47% of staff were in full time posts and 53% were in part time posts.

In 2011, 207 businesses gave an answer:
Full time posts – 1293 employed, average 6.3 per business (56% of the total)
Part time posts – 1029 employed, average 5.1 per business (44% of the total)

Since 2007 the proportion of those in full time has risen by 9%.

To get a clearer picture of changes in the last four years, we can again compare 77 businesses who completed both the 2007 survey and the 2011 version.

Full Time Staff

In 2007 and 2011, 77 businesses gave an answer:
2007 Full time posts – 344 employed, average 4.5 per business (35% of the total compared with part time)
2011 Full time posts – 370 employed, average 4.8 per business (44% of the total compared with part time)

By comparing the two surveys, there are 26 more full time posts in 2011, with an increase in the proportion compared with part time staff of 9 percentage points.

Part Time Staff

In 2007 and 2011, 77 businesses gave an answer:
2007 Part time posts – 630 employed, average 8.2 per business (65% of the total compared with full time)
2011 Part time posts – 457 employed, average 5.9 per business (56% of the total compared with full time)
By comparing the two surveys, there are 177 less part time posts in 2011, with a decrease in the proportion compared with part time staff of 9 percentage points.

Although the number of jobs have decreased in the period, the number of full time posts has increased with a decline in the number of part time posts.

4.4 In 2011 how many local people do you employ? (Local defined as living within 5 miles of Stratford Town)

210 businesses answered this question and indicated that 1552 staff at 7.4 employees per business were locals.

Overall, with 211 businesses having 2399 staff this is an average of 11.4 per employer.

Therefore if you divide 2339 by 1552 then you find that overall two-thirds of employees (65%) are employed from the local area.

4.5 Whether businesses are planning to increase or decrease the number of permanent staff in the next 12 months … (excluding temporary or seasonal staff)

All Businesses

One in five businesses are planning to increase the number of permanent staff in the next 12 months (19%). Around two-thirds (66%) felt they will keep the same number of staff, with one in twenty (5%) looking at decreasing numbers.

	Number	%
Increase	40	19.1
Decrease	10	4.8
Keep the same	138	66.0
Don't know	21	10.0
BASE:	*(209)*	

Two types of businesses have a sufficient sample to analyse by sector; retail and restaurants, pubs etc.

Retail Businesses

Looking at retail, 19% are looking to increase the number of permanent staff in the next 12 months, 8% are looking at a decrease, with 64% looking to keep the same levels.

	Number	%
Increase	22	18.8
Decrease	9	7.7
Keep the same	75	64.1
Don't know	11	9.4
BASE:	*(117)*	

Restaurants, Pubs etc

The restaurant and pub industry have a slightly brighter outlook for the next 12 months. 23% are looking to increase their staff numbers, 3% a decrease and 56% keep the same number.

	Number	%
Increase	7	22.6
Decrease	1	3.2
Keep the same	18	56.0
Don't know	5	16.1
BASE:	*(31)*	

4.6 Whether businesses have improved or expanded their businesses in order to increase trade since 2007 (e.g. internal refit, external enhancements)

There was almost an even split between those respondents that have improved their business to increase trade since 2007 against those that have not – 47% versus those who have 53%.

All Businesses

	Number	%
Yes	100	47.4
No	111	52.6
BASE:	*(211)*	

The results for retail business mirrored that of the overall total, with almost an even split.

Retail Businesses

	Number	%
Yes	58	47.9
No	63	52.1
BASE:	*(121)*	

The results for restaurants, pubs etc saw slightly more businesses improving or expanding their businesses since 2007.

Restaurants, Pubs etc

	Number	%
Yes	16	53.3
No	14	46.7
BASE:	*(30)*	

4.7 Whether businesses are planning to improve or expand their businesses in order to increase trade in the next 12 months (e.g. internal refit, external enhancements)

One in five businesses who responded to this question are planning to improve or expand their businesses to increase trade in the next 12 months.

All Businesses

	Number	%
Yes	28	20.0
No	112	80.0
BASE:	*(140)*	

The results for the retail sector match those of the overall position, with around one in five businesses looking to expand.

Retail Businesses

	Number	%
Yes	16	18.0
No	73	82.0
BASE:	*(89)*	

4.8 How much business turnover has increased, decreased or stayed the same in the last 12 months

All Businesses

Respondents were asked how much their business turnover had gone up, down, or remained about the same compared with a year ago. 8% indicated their turnover had risen over 20% in the last twelve months, with a further 12% having a rise between 10% and 20%. A further 16% replied that their turnover saw a positive increase up to 9%.

A third of respondents indicated that their business turnover had remained at the same levels as twelve months ago.

Negatively, 8% had decreases of 20% or more, 9% between 10 and 20%, and 13% up to 9%.

The overall split was 35% having an increase in turnover, 34% remaining around the same figure and 31% witnessing a decrease.

The biggest increase in turnover in a positive mode was 56%, with the largest decrease figure being 55%.

	Number	%
Over +20%	13	7.5
+10% to +20%	21	12.1
+0.1% to +9%	27	15.6
Stayed the same	59	34.1
-0.1% to -9%	23	13.3
-10% to -20%	16	9.3
Over -20%	14	8.1
BASE:	*(173)*	

Retail Businesses

The split was better than the overall figure for retail businesses. 41% having an increase in turnover, 22% remaining around the same figure, and 37% witnessing a decrease.

	Number	%
Over +20%	7	7.5
+10% to +20%	14	14.9
+0.1% to +9%	17	18.1
Stayed the same	21	22.3
-0.1% to -9%	16	17.0
-10% to -20%	9	9.6
Over -20%	10	10.6
BASE:	*(94)*	

4.9 Ideas about how the town can be improved to attract visitors, and the anticipated impact on the business their ideas would have.

186 businesses responded to this question.

The top themes were parking, maintaining the environment and increasing the vibrancy of the town centre.

44% of businesses were concerned about the cost of parking, 22% wanted improvements to the parking available, and 22% wished to see more visual improvements to the town. In terms of retail, 15% of respondents would like if possible an increase in the number of quality or specialised shops, 14% wanted better attempts to fill empty shops and 12% would like to see the redevelopment of Town Square.

	Nos. of Responses	%
Cost of Parking	82	44
Improvements to Parking	40	22
Improvements to Stratford including Birmingham entry road, Greenhill Street/visual improvements/street cleaning and maintenance/make town look pretty	40	22
Increase number of quality/specialised shops	27	15
Attempt to fill empty shops	26	14
Redevelop Town Square	22	12
More events to bring people in	19	10
Pedestrianise town centre/streets	19	10
Promote Stratford/need new tourism strategy	18	10
Improve traffic flow / lorries blocking routes, etc	16	9
Reduce rates/rents	16	9
Maybird Centre taking trade away	14	8
Too many restaurants/cafes	8	4
Traffic wardens too heavy handed	7	4
Improve tourist information provision/bring TIC back to riverside	5	3
Other	47	25
BASE: (All Respondents)	*(186)*	

"Other" includes comments on:

- Encourage coach parties to stay longer
- Encourage local people to stay in Stratford at night time
- Buses do not run late at night
- More specialised markets
- Need bus and coach station
- More shopping weekend coaches
- Too many charity shops
- More town hosts
- Better transport links
- Enforce rules on anti-social behaviour

4.10 Any other comments

Respondents were asked if they would like to make any other comments. 128 businesses did so.

The main comment by three out of ten was the Theatre re-opening had increased trade. Just over a quarter of those responding (27%) felt that the improvements made because of World Class Stratford had made the town nicer and as a result footfall had increased. Just under one in ten (8%) felt businesses at the top end of the town do not feel the benefits as much as those at the bottom.

	Number of Responses	2011 %
Theatre re-opening has increased trade	38	30
Improvements have helped /town looks nicer/footfall has increased	35	27
Businesses at the top end of town do not feel the benefits as much as those at the bottom	10	8
Parking being an issue/generally	8	6
Cost of parking	7	5
Events and markets take away business i.e. MOP fair	6	5
Due to current economic climate trade has decreased/have to work harder/tough year	5	4
Rubbish shops/town not best for retail	5	4
Concern re: anti-social behaviour/policing	4	3
Encourage more high end retail to Stratford/good to see White Stuff/Jack Wills	4	3
Too many cafes/restaurants	4	3
BID levy too high/should be scrapped	3	2
Care about residents/locals	3	2
Maybird has taken trade away	3	2
Rates/rents are too high	3	2
Too many shops are empty and for so long	3	2
Other	40	31
BASE: (All Respondents)	*(128)*	

"Other" responses includes:

- Too many old people are in charge of making decisions and against change – need younger input and attitudes
- Have increased transactions, but spend, per head, is lower
- Almost went under during Bancroft Gardens works, lost loads of trade
- Speed up planning process at SDC
- Traffic chaos/queues
- Town centre is an eyesore
- Riverside projects have not brought any direct additional trade

5.0 Conclusion

- Conducting these surveys so soon after the completion of the World Class Stratford programme meant that the full impact of WCS could not be captured for the following reasons:

    - The environmental nature of the Programme means that the full beneficial impact on the economy will be felt over a longer term by providing a foundation for further economic development. An example of this is the North Recreation Ground where the infrastructure has been installed to support utility provision to festivals and so encourage this type of event which will draw more visitors to the town;

    - Construction works on the World Class Stratford projects and the refurbishment of the Royal Shakespeare Theatre caused a significant interruption to the town's visitor momentum which cannot be recovered so quickly;

    - Whilst a temporary theatre was installed to compensate for The Royal Shakespeare Theatre and Swan Theatre being closed for refurbishment, there was a net reduction in seating and performances which had an impact on the town's hospitality industry.

- A broad range of impacting factors external to the World Class Stratford programme drew comments from businesses and also need consideration which include:

    - South Warwickshire Tourism Ltd, providers of strategic tourism marketing for South Warwickshire and Stratford-upon-Avon Tourist Information Centre, ceased trading in 2010 thereby seriously affecting the marketing of the town as well as the visitor experience;

    - Poor weather repeatedly occurred at peak holiday times, thereby affecting the domestic day-visitor market;

    - The continuing expansion of the out of town Maybird Shopping Centre during this period has drawn trade away from the town centre;

    - Nationally: the number of tourist trips by UK residents, which has fallen slightly in the four year period;

    - Nationally: from November 2008 to July 2009 there was a decrease in the number of overseas visits to the UK, and bed-space occupancy from March 2008 to November 2009 dropped by up to 10%. There was a positive trend from July 2009 to July 2010 where the percentage rise in domestic overnight trips peaked at 11%;

    - Nationally: The period under study has included the worst recession for decades (e.g. 2009 saw more businesses fail than start up).