



**STRATFORD UPON AVON COACH VISITORS
AND
DRIVERS SURVEY
2010**

FINAL REPORT

**Produced by
Community Leadership &
SDC Consultation Unit**

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STRATFORD UPON AVON COACH VISITORS AND DRIVERS SURVEY 2010

1.0 Introduction

Stratford-on-Avon District Council are looking to identify what will help to encourage those visitors arriving by coach or bus to have a 'better welcome experience' when arriving in and visiting Stratford upon Avon.

In order to do this we enlisted the support of The Research Solution to undertake face to face consultation with

- **Visitors (arriving by coach)**
- **Coach drivers**

The objective of the research was to ascertain how short visits could be converted into longer repeat visits, and to help SDC understand the value of the economy from coach visitors in terms of:-

- Visitor spend
- Type of spend
- Income generated from coach parking
- Where the gaps are and possible solutions

We wanted to understand from coach drivers what would make their stay more hospitable and encourage them and their companies to make repeat visits.

It is worth noting that the income from coach parking from the last three years was:
2007 - £42149
2008 - £46635
2009 - £46642

2.0 Methodology

Visitors (arriving by coach)

Interviews took place at three locations in Stratford upon Avon where visitors by coach were likely to be. The peak visitor period before the end of August was selected with the intention of up to ten days interviewing with an average of 20-25 questionnaires per day completed. This would be dependent on the number of coaches that visit the town each day.

In line with standard practice with visitor surveys, only one person per coach trip was interviewed which dictated the number of interviews to be conducted based on the number of coaches arriving. This is to avoid gathering data which would primarily be duplicate data, due to visitors who are part of a coach party will have come from the same destination, and may have a similar demographic profile.

A total of 238 interviews were conducted in the following locations:-

- Shakespeare's Birthplace Trust 114 interviews
- Windsor Street Coach/Car Park 60 interviews
- Stratford Leisure Centre 64 interviews

Interviews took place on the following dates:

Monday 23 rd August 2010	Monday 30 th August (Bank Holiday)
Tuesday 24 th August	Tuesday 31 st August
Thursday 26 th August	Wednesday 1 st September
Friday 27 th August	Thursday 9 th September
Sunday 29 th August	Friday 10 th September

The data was inputted into the SNAP market research software package and was subject to a 10% verification as part of the quality checking process. All work was conducted under the Market Research Society's Code of Conduct.

Comparison with the 2005 Stratford Visitor Survey was made where relevant.

Coach Drivers

In addition to the survey of visitors by coach, a small sample of coach drivers were also interviewed face to face in order to get their views on their experience of Stratford upon Avon with a particular focus on:

- Parking
- Places to eat and drink
- Ease of finding way around
- Overall impression

25 interviews took place at Windsor Street Coach/Car Park and at Stratford Leisure Centre on Friday 1st October and Tuesday 5th October 2010.

3.0 Summary of Findings

Visitors (arriving by coach)

- More visitors surveyed were part of a coach tour
- London was the most popular destination visited before moving on to other parts of Warwickshire afterwards
- A high number did not stay overnight
- The length of stay in Stratford was on average four hours
- Four out of ten of those surveyed were on their first visit to Stratford
- For repeat visitors, six out of ten visited at least twice a year
- Visitors like the appearance and atmosphere of the town, the feeling of welcome, the parks, and the general cleanliness
- **The availability of street benches needs improving**
- There was a high approval rating with 98% saying they enjoyed their visit
- Visitors like the history of the town, the river and old buildings
- 96% were very likely or likely to recommend Stratford to someone else
- Almost eight out of ten (78%) surveyed were retired.

Coach Drivers

- Parking was easy according to coach drivers and they found it easy to find their way around
- **However two-thirds felt the Coach Park did not offer adequate facilities. There was a desire for a coach drivers rest room.**
- Two-thirds paid for parking, with the same amount feeling it offered good value for money
- The satisfaction with coach parking in Stratford was 96%
- **There was a mixed response to how they rated the places to eat in Stratford District Council**
- Coach drivers in general were satisfied with their overall impression of Stratford.

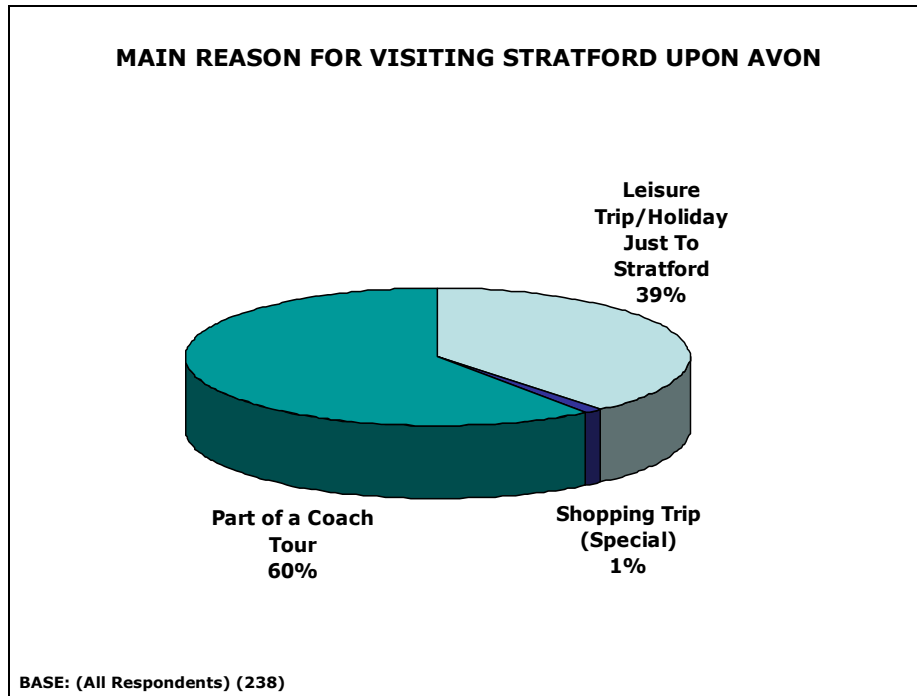
The findings are based on visitors to Stratford-upon-Avon, not the perception of our residents who may have a more critical view.

4.0 Detailed Results - Visitors (arriving by coach)

4.1 Reason for Visit

As the chart below illustrates, six out of ten respondents said their main reason for visiting Stratford was because it was part of a coach tour visiting other destinations. Over a third (39%) claimed it was either a leisure trip or a holiday just to Stratford and 1% stated it was a special shopping trip.

Chart 1:



4.2 Destinations Visited Before / After

Respondents who said they were part of a coach tour visiting other destinations were further questioned as to which other destinations they had visited before Stratford. As the following table shows, almost a fifth (17%) named London and one in ten cited Coventry and Oxford (11% and 10% respectively). 8% of those surveyed said Warwick or Warwickshire, 7% the Cotswolds and 5% Birmingham. 24% mentioned other places.

Table 1: Destinations visited before Stratford-upon-Avon

Mentions 2% or more	Visitors by Coach Survey 2010
BASE	115
London	17%
Coventry	11%
Oxford	10%
Warwick / Warwickshire	8%
Cotswolds	7%
Birmingham	5%
York	3%
Lichfield	3%
Cambridge	3%
Wales	3%
Chipping Norton	2%
Banbury	2%
Bourton-on-the-Water	2%

The same group of respondents was then asked to name other destinations they were visiting after Stratford. Their responses are outlined in the table below. Almost a fifth (18%) stated Warwick / Warwickshire, and one in ten (9%) said London. 7% of those surveyed cited Coventry, and the same percentage said the Cotswolds and York. 17% of visitors mentioned other places once.

Table 2: Destinations visited after Stratford-upon-Avon

Mentions 2% or more	Visitors by Coach Survey 2010
BASE	115
Warwick / Warwickshire	18%
London	9%
Coventry	7%
Cotswolds	7%
York	7%
Oxford	4%
Leamington Spa	4%
Great Malvern	4%
Nottingham	4%
Wales	3%
Birmingham	3%
Worcester	3%
Evesham	3%
Stow-on-the-Wold	2%
Cambridge	2%
Edinburgh	2%
Banbury	2%
Bath	2%

4.3 Respondents Place of Residence

All visitors were asked where they lived: their home town and county / country and their feedback is shown in the following table. One in ten cited either the West Midlands, or Australia, or South Wales, (8%, 7% and 5% respectively). 37 other destinations were mentioned once.

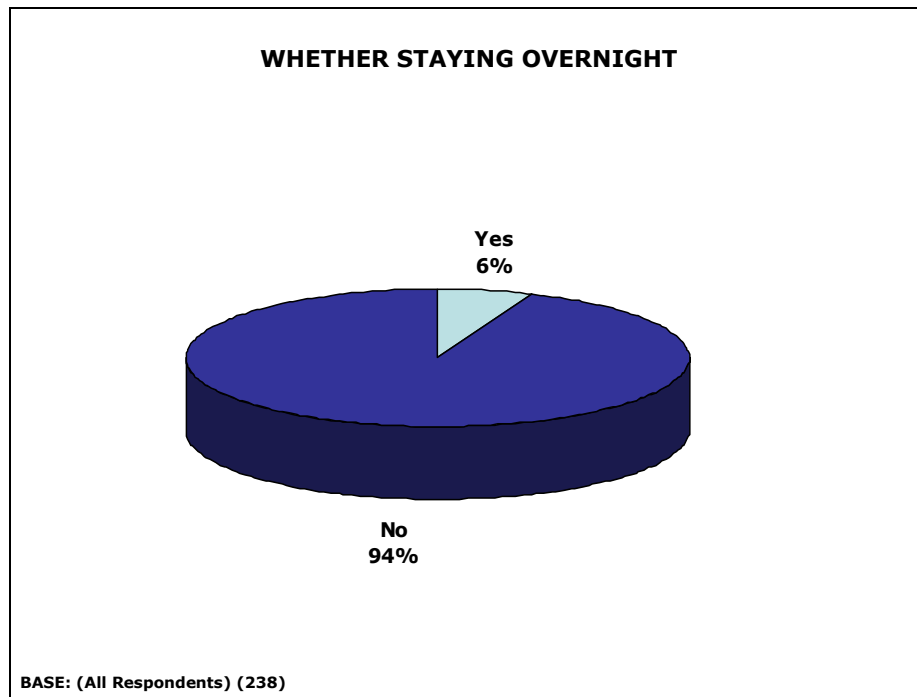
Table 3: Where those surveyed lived

Mentions 2% or more	Visitors by Coach Survey 2010
BASE	237
West Midlands	8%
Australia	7%
South Wales	5%
London / Middlesex	4%
West Yorkshire	3%
N. Ireland	3%
Lancashire	3%
Nottinghamshire	3%
Norfolk	3%
USA	3%
Durham	3%
Tyne & Wear	3%
South Yorkshire	2%
North Yorkshire	2%
Leicestershire	2%
Kent	2%
Devon	2%
Germany	2%
Rest of Asia	2%
Cumbria	2%
Northamptonshire	2%
Warwickshire	2%
Hants / Isle of Wight	2%
Scotland	2%
Netherlands	2%

4.4 Overnight Stay

Everybody was asked if they were staying overnight in Stratford: 14 said they were which represented 6% of those surveyed as opposed to 224 (94%) who said not.

Chart 2:

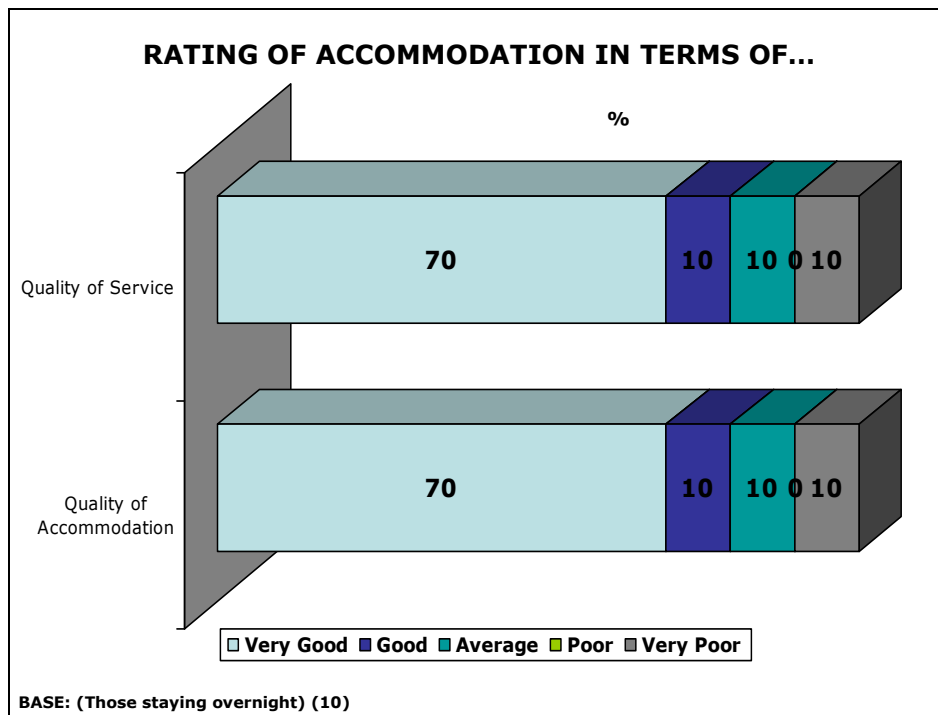


The average length of stay of the 14 visitors staying in Stratford upon Avon was 3.2 nights.

The average length of stay of the 224 day visitors not staying in Stratford upon Avon was 4 hours 5 minutes. This compares with the 4 hours 44 minutes recorded in 2005, although that was all types of visitor not just those arriving by coach. This will be lower than the overall day visitor figure as with arriving by coach they are more likely to be on a fixed time period of stay.

Respondents staying overnight in Stratford were further questioned as to how they would rate their accommodation establishment in terms of the quality of service and the quality of accommodation, on a scale of 1 to 5 (with 5 being very good and 1 being very poor). The subsequent chart demonstrates the feedback received, with seven out of ten respondents (70%) stating very good for both aspects and none saying poor in both cases, although 10% rated the quality of service and accommodation as very poor.

Chart 3:



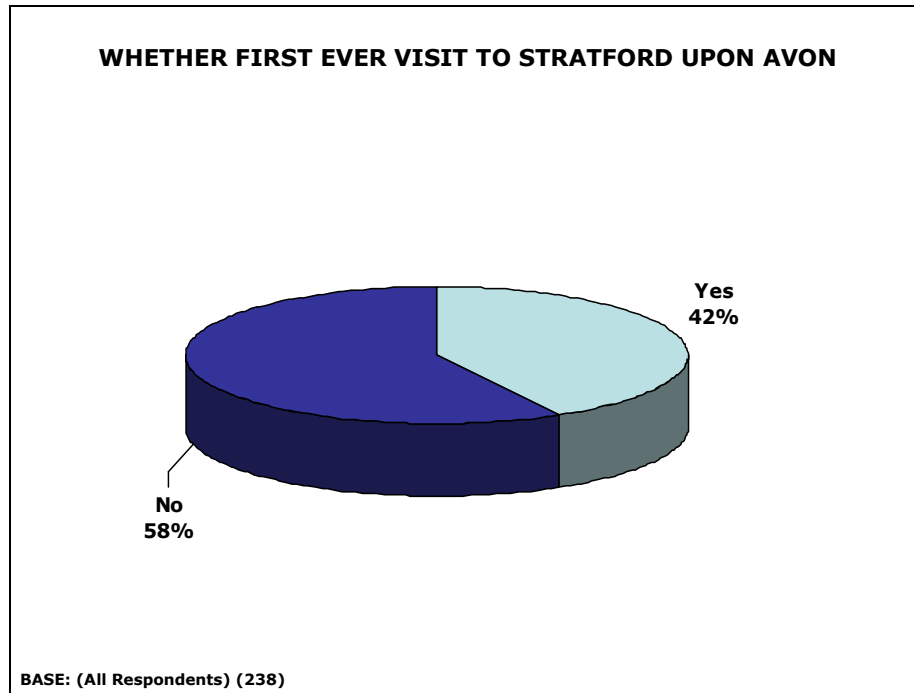
4.5 New / Repeat Visitors

In 2010, 42% of those surveyed arriving by coach were new to Stratford, whereas for 58% this was a repeat visit. In 2005, 30% were making a first visit, 12 percentage points less than in 2010, and 70% had been to the town before. It must be noted the 2005 figure includes all visitors, not just those arriving by coach.

Comparing those on a first visit by the main reason for visiting Stratford, 51% were part of a coach tour and 27% were on a leisure trip/holiday.

94% of overseas visitors were on their first visit to Stratford upon Avon.

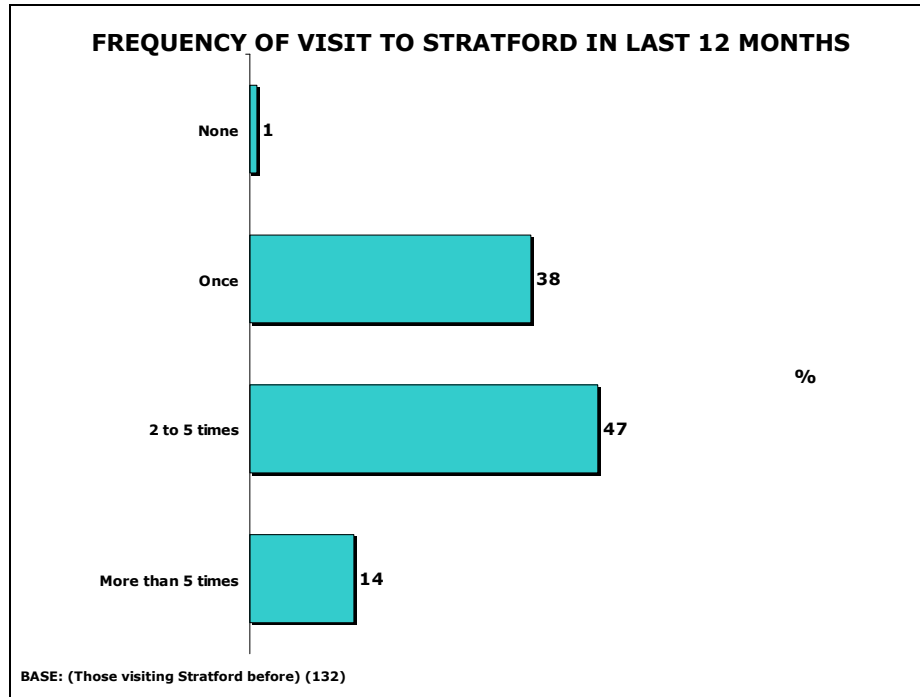
Chart 4:



Those visitors for whom it was not their first ever visit to Stratford, were then questioned as to how many times they had visited Stratford in the last 12 months. The chart below shows feedback received: almost half (47%) said they had visited the town between 2 and 5 times in the last year, with a further 14% having been more than five times. Just over a third of respondents (38%) replied they had visited once. Not surprisingly, the majority of repeat visitors on the most frequent basis live in Warwickshire and the West Midlands.

Eight out of ten visitors who were on a leisure trip have visited Stratford up to five times in the last twelve months. This compares with 43% on an organised coach tour.

Chart 5:

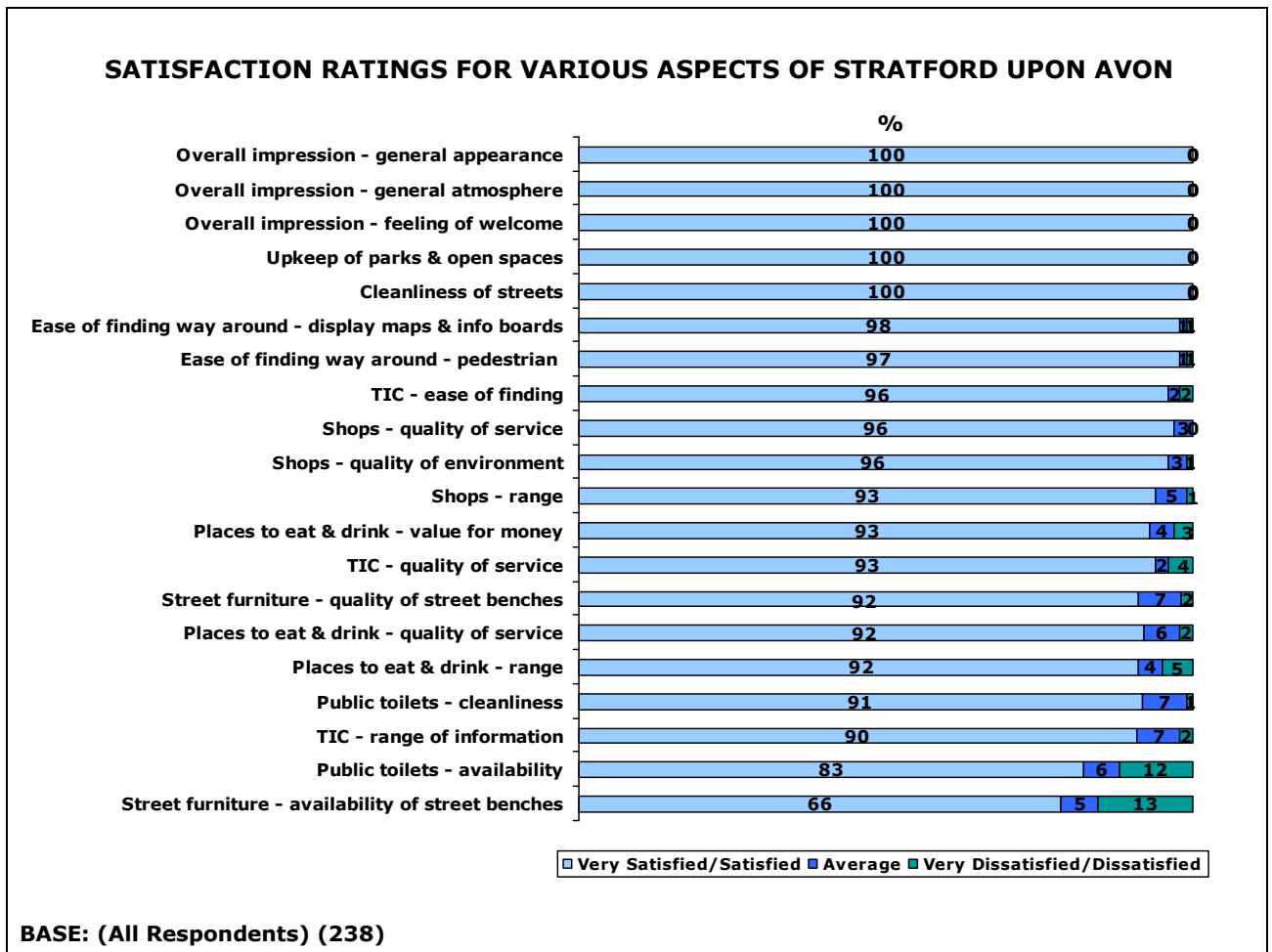


4.6 Ratings with Various Aspects

All visitors were questioned about how they would rate their overall satisfaction regarding various aspects of Stratford. As can be seen from the chart below, all visitors (100%) claimed to be very satisfied or satisfied with their overall impression of Stratford: the general appearance: the general atmosphere; and the feeling of welcome. Likewise, all visitors (100%) were very satisfied or satisfied with the upkeep of parks and open spaces as well as the cleanliness of streets.

The availability of street benches had the lowest rating at 66% satisfaction.

Chart 6:



The following table shows the average scores for Stratford, comparing the 2005 Visitor Survey with the 2010 Visitors by Coach Survey.

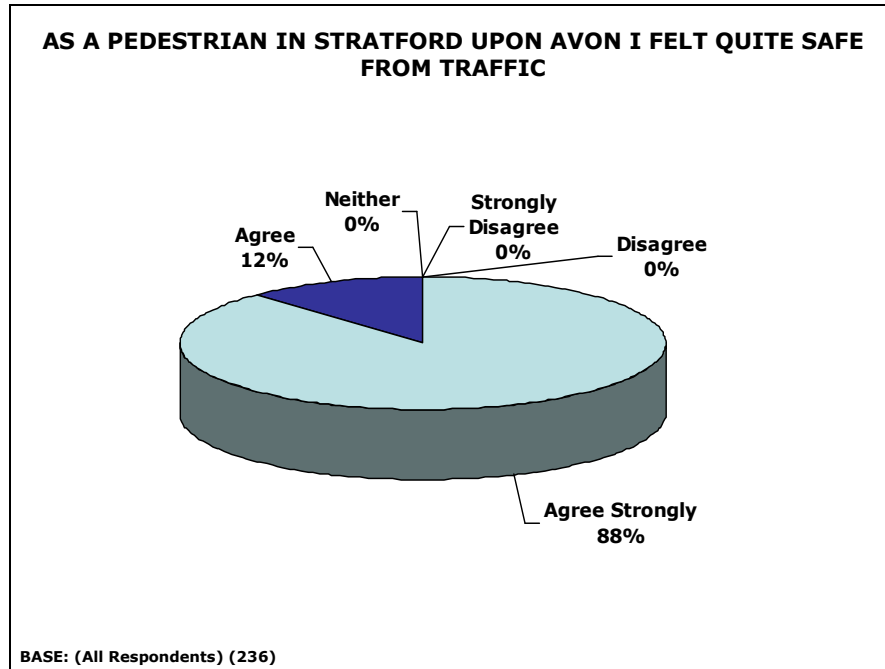
Table 5: Average Scores for Stratford upon Avon, comparing 2005 Visitor Survey Scores with Visitors by Coach Survey 2010

	Stratford upon Avon 2005	Visitors by Coach 2010	Base
Street furniture - availability of street benches	-	4.29	201
Street furniture - quality of street benches	-	4.68	192
Places to eat & drink - range	4.38	4.63	142
Places to eat & drink - quality of service	4.12	4.67	140
Places to eat & drink - value for money	3.70	4.65	140
Shops - range	4.28	4.68	184
Shops - quality of environment	4.24	4.75	178
Shops - value for money	-	4.78	173
Ease of finding way around - pedestrian signs	4.06	4.85	219
Ease of finding way around - display maps & info boards	4.10	4.86	214
Public toilets - availability	3.58	4.44	163
Public toilets - cleanliness	4.06	4.74	155
Cleanliness of streets	4.36	4.95	233
Upkeep of parks & open spaces	4.59	4.94	226
General atmosphere	4.56	4.86	232
TIC - ease of finding	4.09	4.84	43
TIC - quality of service	4.29	4.73	41
TIC - range of information	4.44	4.74	43
Overall impression - general atmosphere	-	4.88	232
Overall impression - general appearance	-	4.88	232

4.7 Safety

Everybody was asked how far would they agree or disagree with the statement: "As a pedestrian in Stratford upon Avon I felt quite safe from the traffic". As can be seen from the chart below, nine out of ten (88%) agreed strongly with the statement and the remaining 12% agreed with it, with no-one in disagreement.

Chart 7:



4.8 Overall Rating

Next, all visitors were asked to rate the overall enjoyment of their visit to Stratford that day. Over three quarters (78%) rated it very high and exactly one fifth (20%) said high. Not one person responded low or very low.

Table 6: Visitor opinions on overall enjoyment of the visit to Stratford

	Stratford upon Avon 2005	Visitors by Coach Survey 2010
BASE	515	238
Very high	75%	78%
High	24%	20%
Average	1%	1%
Low	*	*
Very low	*	*

Everybody was asked to state what they most liked about Stratford and their feedback is illustrated in the following table. Over a fifth (21%) said history and 17% mentioned the river or riverside. 16% of those surveyed liked the architecture / old buildings and 13% stated the atmosphere. Interestingly, just one in ten (10%) stated Shakespeare's Birthplace, 4% cited theatre and 3% said parks. Of the other likes these included markets, gardens, churches, and good mix of visitors.

There was a difference in what people liked depending on whether they were a first time or repeat visitor. Repeat visitors were more likely to enjoy the riverside / river and the atmosphere compared with first time visitors. On the other hand first time visitors were more likely to enjoy Shakespeare.

Table 7: What visitors liked most about Stratford

Mentions 3% or more	Visitors by Coach Survey 2010
BASE	231
History	21%
River / Riverside	17%
Architecture / Old Buildings	16%
Atmosphere / Relaxed / Ambience	13%
Shops / Shopping	12%
Shakespeare's Birthplace	10%
Nice place to visit / Interesting place to visit	7%
All of it / Everything	7%
Scenery / Beautiful	6%
Friendly people	6%
Culture / Tradition	6%
Clean and Tidy	6%
Canals / Canal walks	5%
Theatre	4%
Character / Heritage	3%
Parks	3%
Walks / Walking	3%
Pedestrian friendly	3%
Nice small town	3%
Nothing specific / in particular	3%
Other	18%

Seven in ten (69%) said nothing had spoilt their visit and 12% stated the weather. Of the 11% of other mentioned, this included "not easy for walking", too commercial" and "overgrown trees".

Table 8: What spoilt respondents' visit to Stratford

Mentions 2% or more	Visitors by Coach Survey 2010
BASE	211
No / None / Nothing	69%
Weather	12%
Not enough benches / more seating	2%
Expensive	2%
Public toilets / more / better quality	2%
Too many tourists	2%
Don't know	2%
Other	11%

All visitors were asked the likelihood of them recommending Stratford to someone else and feedback is compared with that of 2005 in the following table. In both surveys nearly everybody who responded stated that they were very likely or likely to recommend Stratford to someone else although overall this fell by 2 percentage points from 98% in 2005 to 96% in 2010.

Table 9: Visitor opinions on the likelihood of recommending Stratford to someone else

	Stratford upon Avon 2005	Visitors by Coach Survey 2010
BASE	515	228
Very likely	79%	78%
Likely	19%	18%
Possibly	1%	3%
Unlikely	*	*
Very unlikely	*	*

4.9 Expenditure

Visitors were asked to say how much and their immediate party were likely to spend on their trip. The average spend per person for serviced eating and drinking once in Stratford was £18.87, the average shopping figure once in Stratford was £29.07 and for accommodation and entrance to an attraction was £131.74.

Of the 238 visitors interviewed, the totals below reflect 454 people.

Table 10: Visitor opinions on the likelihood of recommending Stratford to someone else

Average Spending	Visitors by Coach Survey 2010
BASE	238
Serviced eating and drinking ONCE IN STRATFORD (in cafes, pubs, restaurants, hotels etc.)	£18.87
Shopping ONCE IN STRATFORD (including souvenirs, guidebooks, clothes, sweets, drinks, food, other purchases)	£29.07
Entertainment ONCE IN STRATFORD (including admissions to attractions, theatre/cinema tickets, guided tours)	£25.00*
If coach ticket is all inclusive and includes accommodation and entrance to an attraction – total ticket price	£131.74

* based on 2 responses

4.10 Profile Information

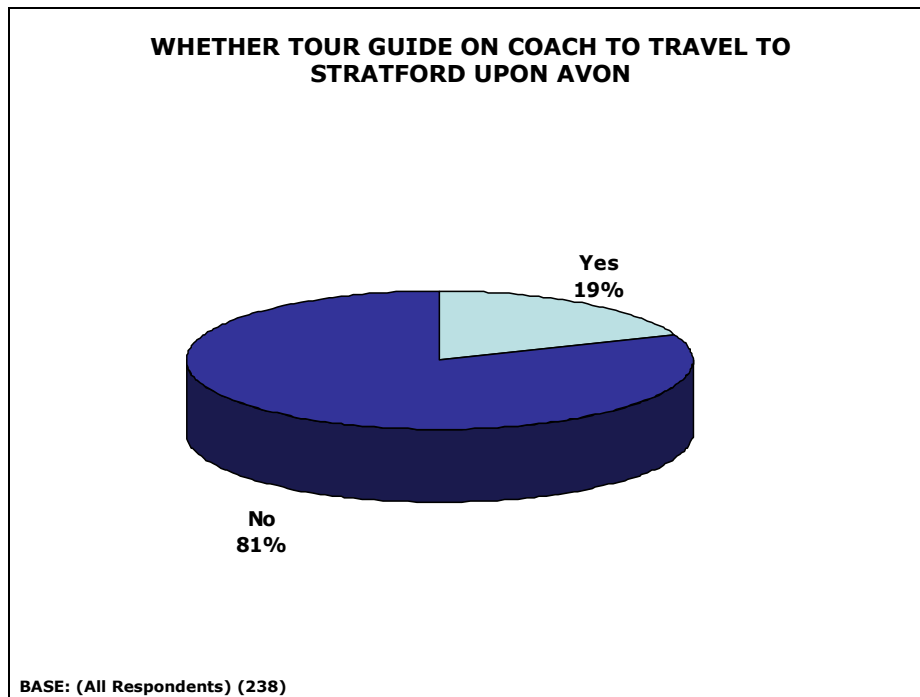
Visitors were asked to state, including themselves, how many people in their immediate party were male and female and which age group they fell into. Just less than one fifth (18%) of those surveyed were females aged between 65 and 74 and 17% of those surveyed were males in this same age category. Similarly, 17% of visitors were female aged 55 to 64. Interestingly, 16% of those questioned were female and aged 75 or over.

Table 11: Visitor numbers in party and age and gender

Base: 440 Age	Male	Female
0-15	0%	0%
16-24	0%	1%
25-34	1%	1%
35-44	0%	1%
45-54	1%	5%
55-64	11%	17%
65-74	17%	18%
75+	11%	16%

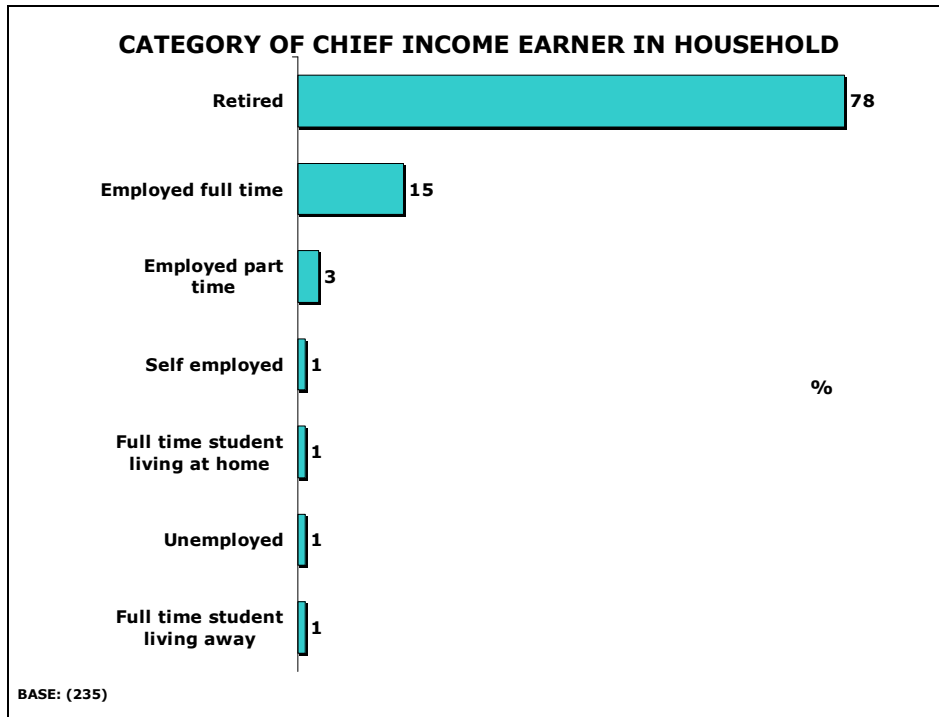
Visitors were asked whether there was a tour guide on the coach used to travel to Stratford upon Avon, 19% said that there was. Visitors were more likely to be on a first time visit to Stratford with a tour guide than not – 33% versus 9%.

Chart 8:



Asked what the category of the chief income earner in the household is 78% said they were retired and 15% employed full time.

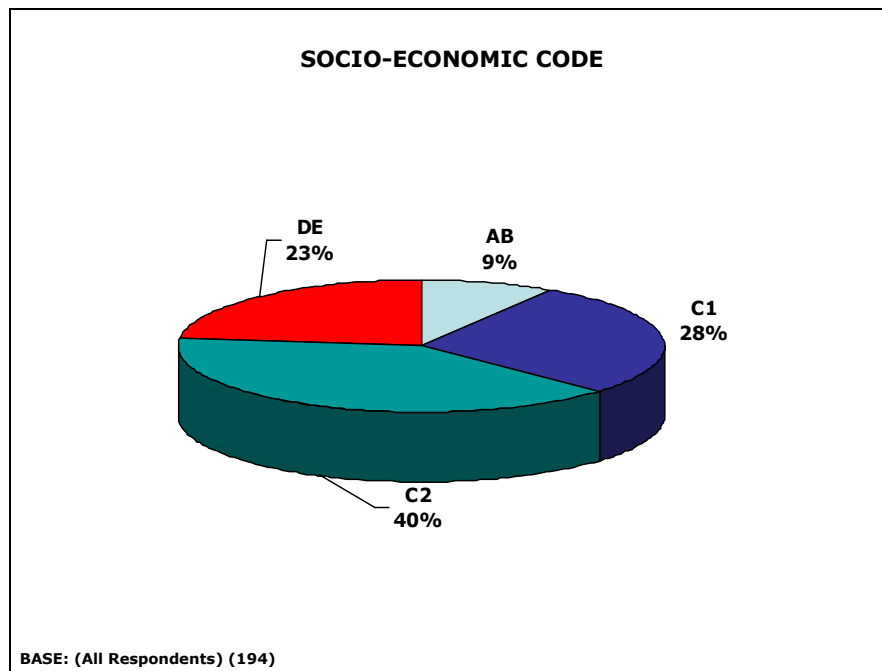
Chart 9:



Of the 194 respondents who provided information on the type of company the main income-earner works for and the position held from this 40% were classified as socio economic grouping C2, 23% were DE, 28% C1, and 9% from AB.

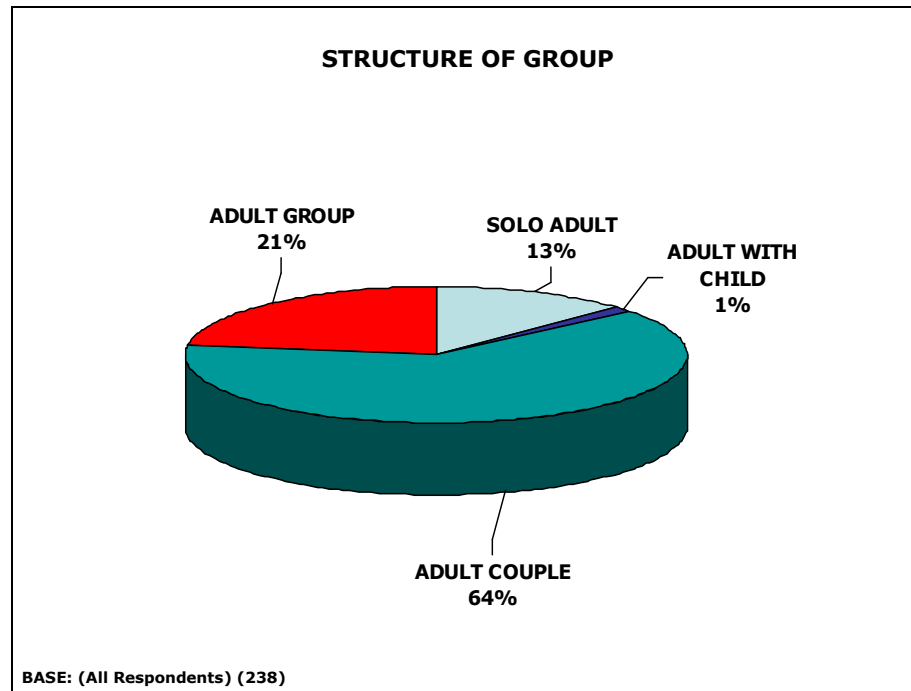
Those in group ABC1 were more likely to be part of a coach tour visiting other destinations (47%) than those on a leisure trip/holiday just to Stratford (22%).

Chart 10:



The structure of the respondents groups were calculated and it found that almost two-thirds were adult couples (64%), just over a fifth (21%) in adult groups, and 13% solo adults.

Chart 11:

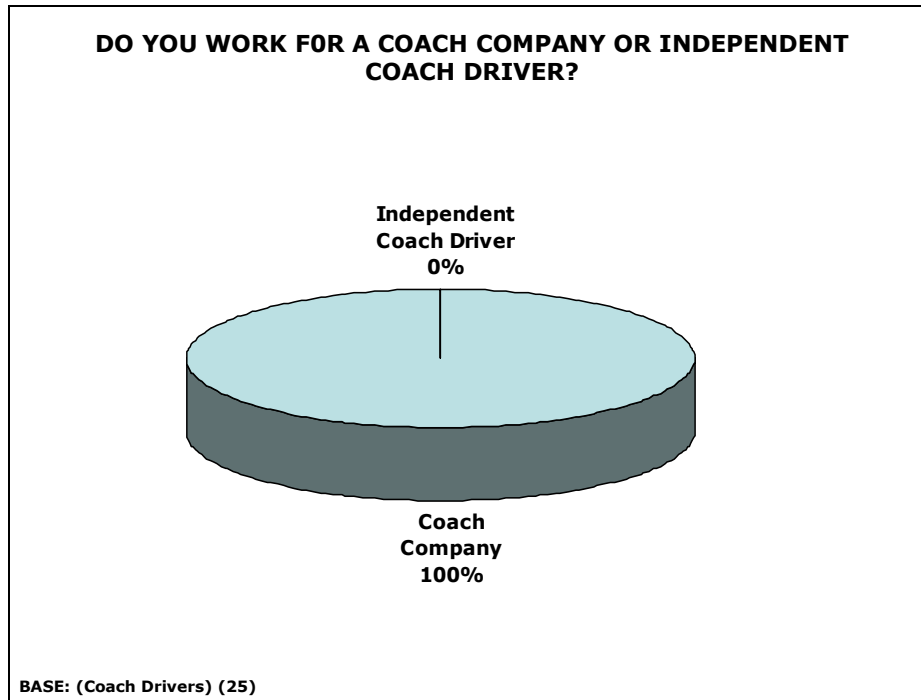


5.0 Detailed Results – Coach Drivers

5.1 Whether Independent or Not

Coach drivers were also surveyed in respect of their trip to Stratford upon Avon. Initially they were asked to confirm whether they worked for a coach company or if they were an independent coach driver. As the graph below demonstrates, they all worked for a coach company.

Chart 12:

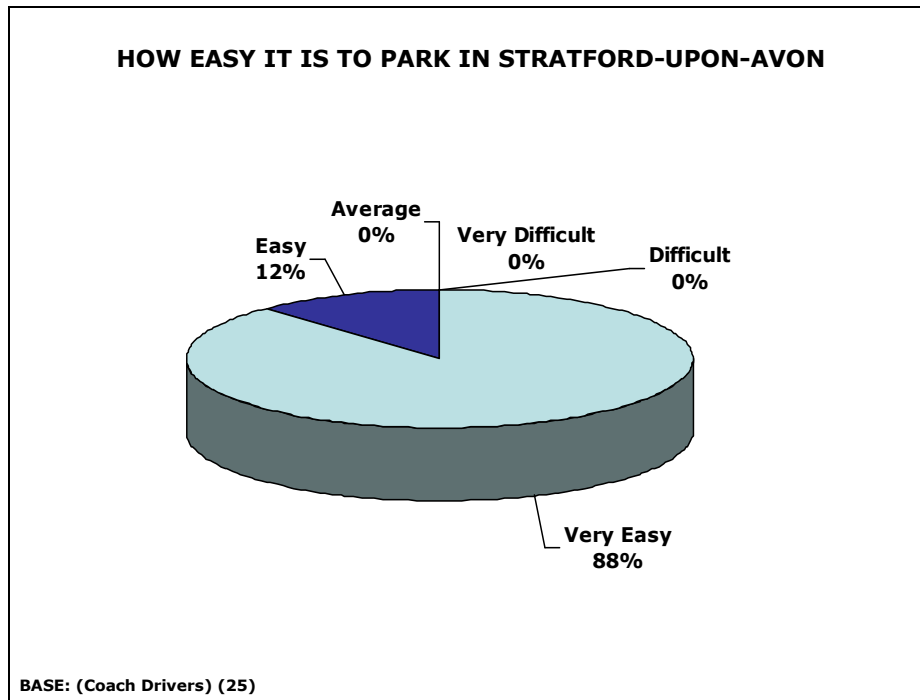


They were asked to name the company they worked for and their feedback, 25 comments, is listed in Appendix A.

5.2 Parking

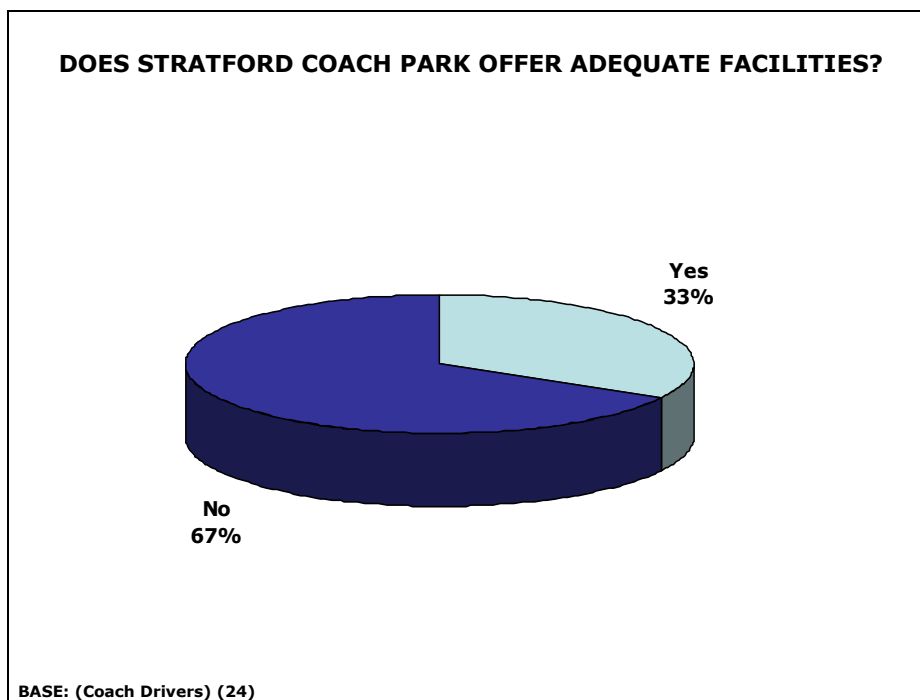
Next they were questioned about how easy they found it to park in Stratford. Nobody said it was difficult, 88% claimed it was very easy and 12% said easy, as illustrated in the chart below.

Chart 13:



Next coach drivers were asked if the Stratford Coach Park offers adequate facilities: two thirds (67%) replied no.

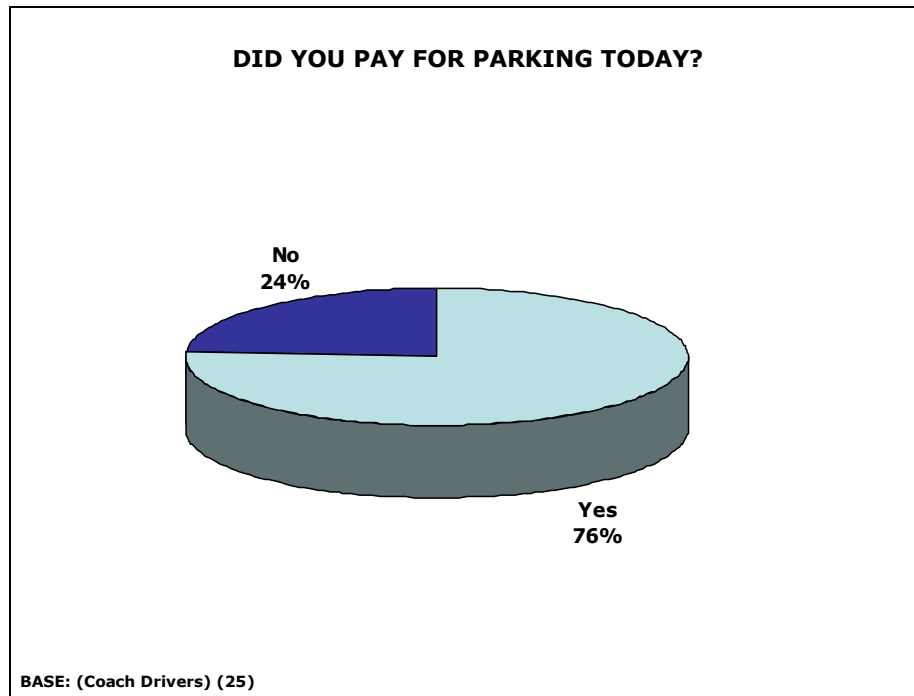
Chart 14:



16 comments were received to the question of what other facilities coach drivers would like to see and these are listed in Appendix B.

When questioned whether they had paid for parking that day, over three quarters (76%) of coach drivers confirmed they had, as illustrated in the pie graph below.

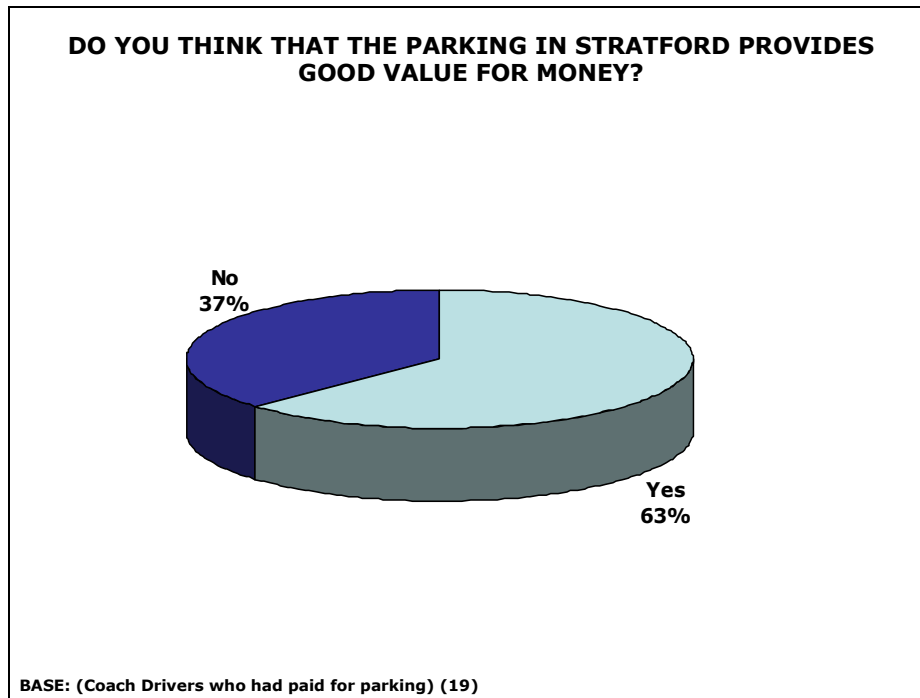
Chart 15:



When asked how much they had paid for parking the 19 coach drivers who had done so said they had paid between £4 and £6.

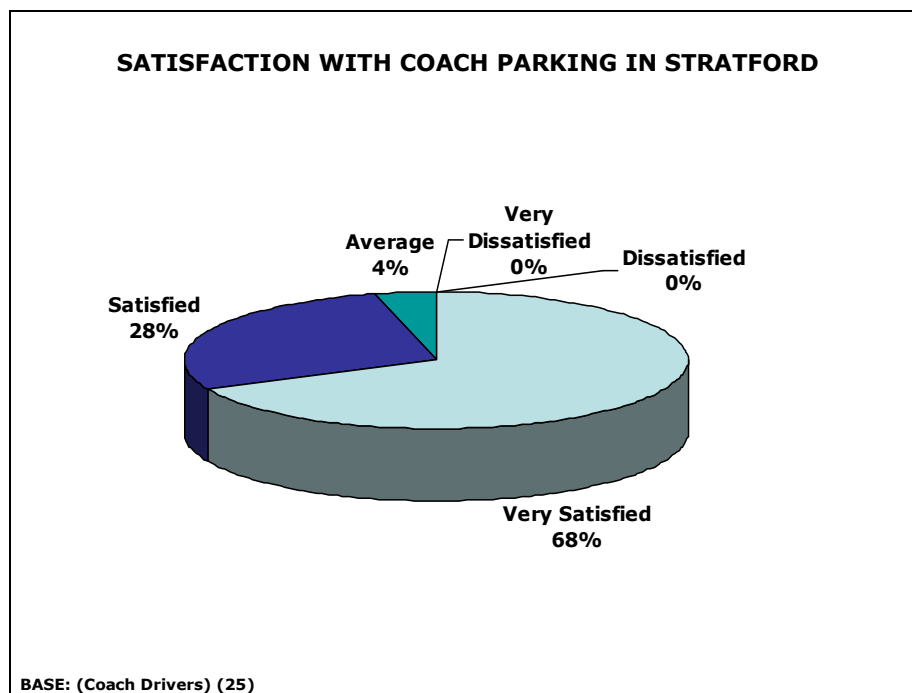
Those coach drivers who had paid for parking in Stratford were further questioned as to whether it provided good value for money. Almost four in ten coach drivers (37%) did not believe that parking in Stratford provided good value for money.

Chart 16:



All coach drivers were asked to indicate their satisfaction with coach parking in Stratford. As shown within the following pie chart, nobody expressed dissatisfaction, 4% said it was average, 28% were satisfied, and the remaining 68% were very satisfied.

Chart 17:



5.3 Satisfaction with Facilities

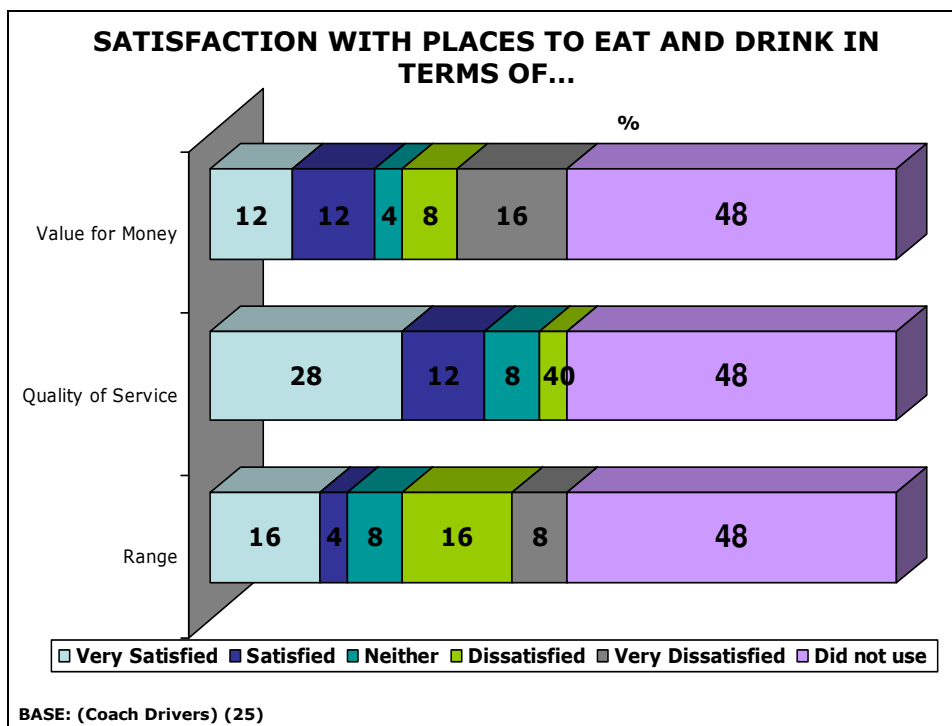
Coach drivers were then asked how satisfied they were with places to eat and drink in terms of the range available, quality of service, and value for money. Interestingly, almost half (48%) of all the coach drivers surveyed, said that they had not made use of places to eat and drink.

A fifth (20%) of coach drivers were either very satisfied or satisfied with the range of places to eat and drink, however, almost a quarter (24%) expressed dissatisfaction with it.

So far as the quality of service was concerned, four in ten respondents were very satisfied or satisfied with it, compared to 4% who were dissatisfied.

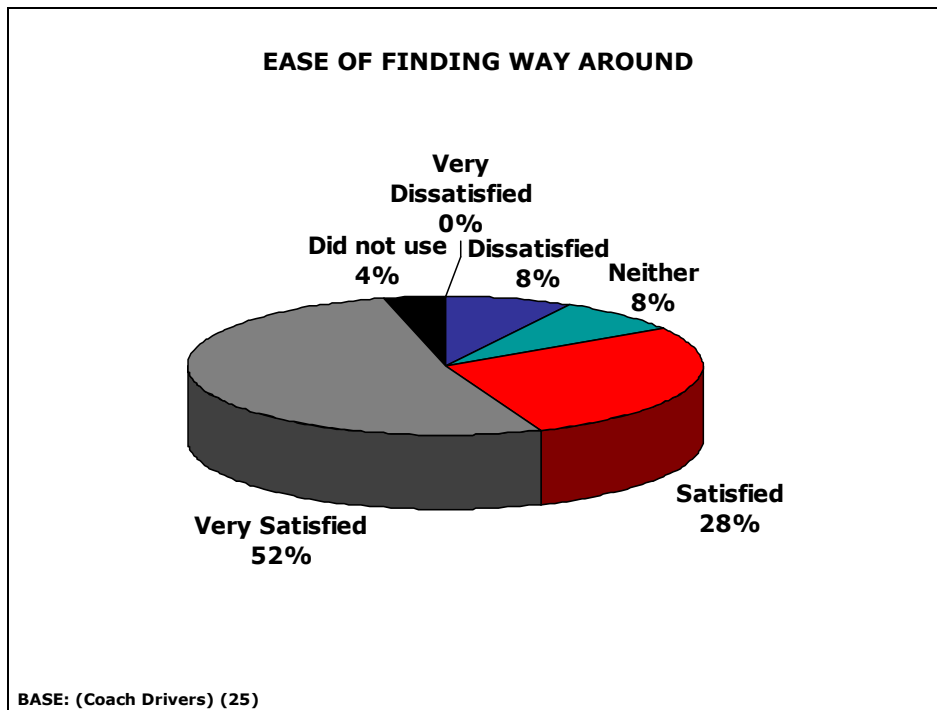
As for value for money, almost a quarter (24%) of coach drivers were very dissatisfied or dissatisfied, yet the exact same amount were very satisfied or satisfied with it.

Chart 18:



Regarding their ease of finding their way around, eight out of ten (80%) of coach drivers surveyed were satisfied or very satisfied, as illustrated below.

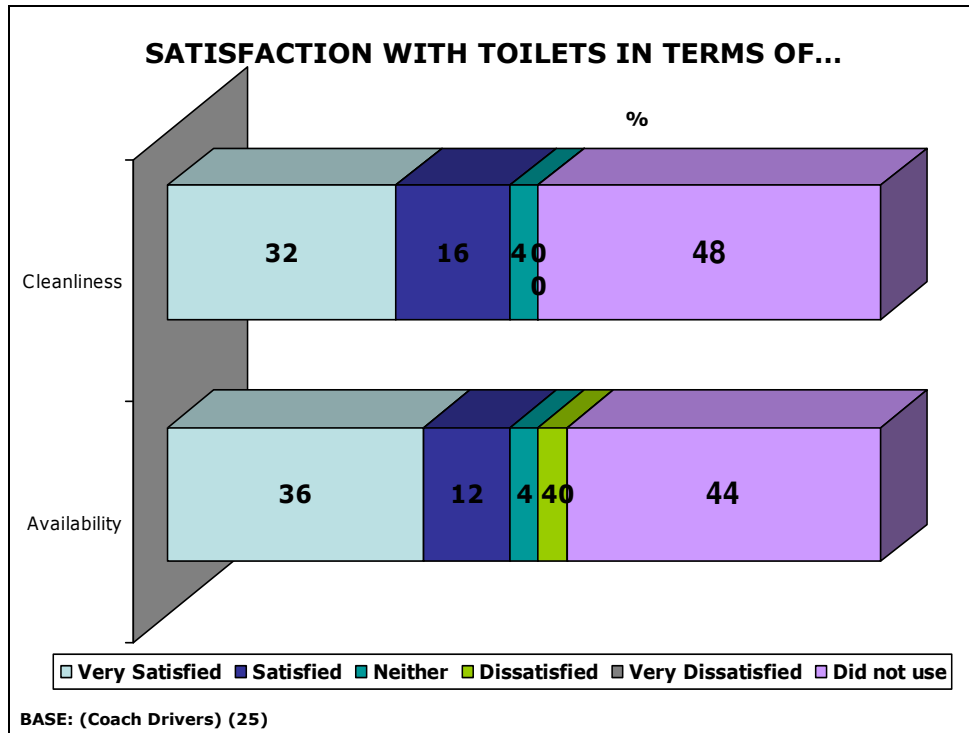
Chart 19:



Next coach drivers were asked about their satisfaction with toilets in terms of availability and cleanliness and their feedback is demonstrated in the chart below. Almost half (48%) claimed to be very satisfied or satisfied with the availability of toilets; however, 44% of coach drivers claimed they did not use the toilets.

So far as cleanliness was concerned, the same percentage, 48% were very satisfied or satisfied, although 48% of the coach drivers said they did not use the toilets.

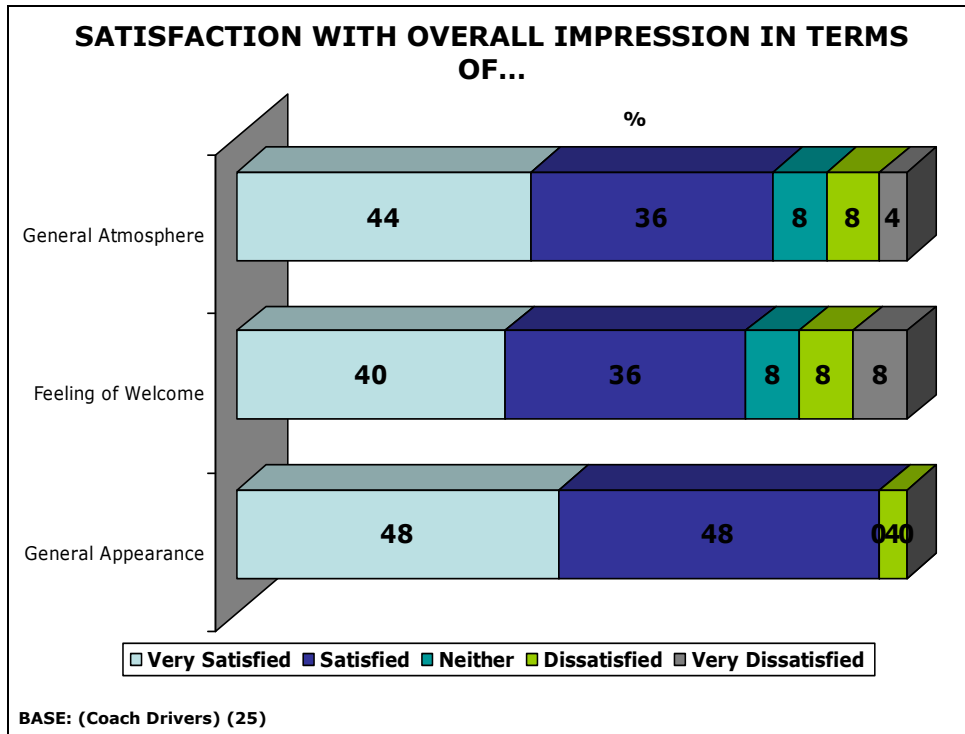
Chart 20:



5.4 Overall Impression

Finally, coach drivers were asked about their satisfaction with their overall impression in terms of general atmosphere, feeling of welcome and general appearance. Significantly, four fifths (80%) of those surveyed claimed to be very satisfied or satisfied with the general atmosphere, however, 12% expressed dissatisfaction with it. Over three quarters (76%) were very satisfied or satisfied with the feeling of welcome, but 16% were dissatisfied. Notably, nearly all (96%) of those surveyed were satisfied with the general appearance.

Chart 21:



6.0 Possible Solutions

In general, the overall feedback from those surveyed was very positive with some areas for improvement:-

Street Benches (Visitors)

A number of respondents felt that the availability of street benches needed improving, given that the majority of those surveyed are older and retired visitors to Stratford upon Avon, consideration could be given to:-

- Installation of additional benches at appropriate locations.
- Taking advantage of and promoting the 'street cafe culture' where more seating is now available outside of various catering establishments.

Facilities & Places to Eat (Coach Drivers)

Whilst there is some inconsistency with drivers satisfaction with the range of places to eat and drink, there is a general consensus for the need to provide facilities for coach drivers, which could be achieved by:-

- Providing rest room and hospitality facilities at Stratford Leisure and Visitor Centre
- Providing rest room and hospitality facilities at Hotels in the town which may result in recommendations to other drivers and an increase in coach clients to those hotels
- A Loyalty Card Scheme for coach drivers for local shops, restaurants, hotels, and attractions which again could result in recommendations to other drivers, coach companies, and clients.

It should be noted that significant income is generated through coach parking but not all coach drivers make use of the coach park. It is possible that if better facilities were provided this could be increase usage of the coach park and generate further parking income.

Ambassador Scheme – Pride in Stratford-upon-Avon

Discussions are currently in progress with Stratforward regarding the possibility of introducing an Ambassador Scheme which is aimed at providing visitors who arrive by coach/bus or car with a 'Better Welcome' experience when they arrive in Stratford upon Avon. This approach would help to create a lasting impression, based on first experience and is aimed at encouraging repeat visits and overnight stays.

The scheme would build on the service currently provided through the Town Host scheme and would include the training of volunteers, members of the community and front facing people to promote the town through:-

- Understanding customer needs through training delivered via workshops
- Recognising, visiting and experiencing the Town's USP's
- Promoting retail tourism

It is intended that Ambassadors would be present at points of entry to the town to meet and greet visitors as they arrive and to provide and signpost them to information, attractions and USP's.

APPENDICES

Appendix A: 25 comments to Q1a: The name of the company the coach drivers work for

- Jori-Reisen GMBH, Schwelch, Germany
- London Mini Coaches
- Safeguard Coaches
- Commandery Coaches
- Croydon Coaches
- Applebys
- Omega
- Cab Travel
- Travellers Choice
- London Mini Coaches
- Eagre
- Eagre
- Coach Miles London Ltd
- Silverdale
- Catteralls
- Cab Company
- Red Wing
- J J Kavanagh
- Parnham
- T & A Travel
- Johnsons
- Baker Travel
- Travellers Choice
- Woods
- Coach Miles London Ltd

Appendix B: 16 comments to Q3a: What other facilities coach drivers would like to see

- Continental coffee place.
- A room where we can go to. Shouldn't have to sit on coaches all the time.
- Drivers' cafeteria.
- Place specific with better food choices.
- Proper cafe where you can get decent priced meals and snacks. Parking prices are wrong - should go by the hour. Proper toilets.
- Cash Machine.
- No where to sit. Better eating places closer to coach park.
- A coach wash, coffee bar and a change machine.
- Drivers rest room. Somewhere to get tea and coffee.
- Drivers room, reasonably priced food.
- Somewhere to get something greasy to eat that is close by!
- Toilet drop and wash facilities. Security if parked overnight.
- Payment by card. Cafeteria close by with more choice of food.
- Drivers' room.
- Somewhere to get a drink that doesn't charge the earth.
- Drivers room, cheaper prices for food and drinks.