



## EXECUTIVE SUMMARY

### Background

The Stoke-on-Trent Visitor Survey was undertaken by Heart of England Tourism on behalf of Stoke-on-Trent Tourism. The survey was undertaken from June to October 2004 at 16 locations within Stoke, including The Spode Visitor Centre, Waterworld, Stoke Ski Centre, Trentham Gardens and The Wedgwood Factory Shop.

The aim of the research was to generate information on the origin, profile and behaviour of visitors to Stoke-on-Trent and Newcastle under Lyme. The survey also provided an insight into visitors' views on the strengths and weaknesses of the two areas as visitor destinations and evaluated opinions on specific aspects of the visitor experience.

### Visitor Profile Stoke-on-Trent

- A total of 1021 interviews were carried out in Stoke-on-Trent
- The average group size was 2.7 people
- Over half (55%) of visitors to Stoke-on-Trent were over the age of 45. This reflects the findings for group composition, where the dominant groups were adult couples and adult groups indicating that Stoke-on-Trent and its attractions appeals to the older age groups.
- 16% of visitors interviewed were 'AB', 28% 'C1', 7% 'C2' and 49% were in the 'DE' category. Of the 49% who were classified as DE, 70% were retired on a state pension.
- UK day visitors were predominately from Staffordshire (44%) and the West Midlands (14%). Visitors staying overnight originated in the main from the East of England (15%), the East Midlands (13%) and the South (13%).
- Of the overseas visitors interviewed (88no) over a third (34%) originated in the USA, followed by 17% of visitors from Australia, 9% from Canada, 8% from Ireland and 6% from Japan.

### New and Repeat Visitors

- 15% of visitors to Stoke-on-Trent were visiting for the first time.
- There is variation in new and repeat trade shown by surveying at different attractions and general locations, and between the market segments. There is a slight variation between repeat day visitors (91%) and repeat touring UK visitors (76%) and overnight UK visitors (72%). The repeat ratio for overseas visitors is 51%.

- In all, it can be seen that the large majority (90%) of repeat visitors had previously been to Stoke-on-Trent as a day visitor and 8% had previously stayed overnight.

### **Purpose of Visit**

- Visitors were asked the main purpose of their visit to Stoke-on-Trent on the day they were interviewed.
- Leisure/holiday was noted by 39% of visitors, closely followed by visiting friends and relatives (38%).
- Three quarters (73%) of overseas visitors were in Stoke for a leisure / holiday trip, compared to just over a third (36%) of UK visitors. Two fifths (40%) of UK visitors were visiting friends or relatives compared to only one fifth (19%) of overseas visitors.
- 7 out of 10 (69%) new visitors were on a leisure / holiday in Stoke-on-Trent compared to one third (34%) of repeat visitors. A higher proportion of repeat visitors (43%) were visiting friends or relatives, compared to only 10% of new visitors.
- Those visitors who were in Stoke-on-Trent for a leisure / holiday (39%) were asked if anything had prompted their visit. Three quarters (76%) of visitors were prompted to visit Stoke by the internet, followed by 70% who were prompted by an advertisement. 31% of overseas visitors were prompted by a brochure, compared to only 17% of UK visitors. Over two thirds (67%) of UK visitors didn't use anything to prompt their visit compared to only 36% of overseas visitors.

### **Length of Stay**

- On average a whole trip away from home, including to other destinations lasted 3.1 nights for domestic visitors.
- Those touring and staying overnight from overseas were generally stopping for around 25 nights on their whole trip to the UK.
- Looking at all of the overnight visitors to Stoke-on-Trent who were staying under 36 nights maximum - including the VFR market, the average length of stay was 4.6 nights in Stoke-on-Trent.
- 63% of all overnight visitors were staying for one to three nights, on a par with the 2000 survey when 61% of overnight visitors were staying for the same number of nights.
- Looking at the UK domestic overnights, three quarters (74%) of those stopping overnight were stopping for a short break of up to 3 nights, compared to only 40% of overseas visitors.
- The average (mean) for UK day visitors was 5 hours and 49 minutes
- The average length of time spent in Stoke-on-Trent by repeat visitors is longer at 5 hours 55 minutes (4 hours and 24 minutes in 2000) than new visitors who stopped for 4 hours and 43 minutes (4 hours and 54 minutes in 2000).

## Accommodation

- 53% of all overnight visitors were using serviced accommodation; with one third (33%) using B&Bs/Guesthouse followed by one quarter (20%) using hotels.
- Just over one third (34%) of all overnight visitors were staying with friends and family (VFR).
- The self-catering market in Stoke-on-Trent represents a lesser-developed segment for the area. Non-serviced sources in total, including, touring caravan (1%), narrowboats (2%), rented self catering (3%) and Youth Hostel (1%) accounts for 7% of overnight accommodation.
- Overseas visitors were more likely to use serviced accommodation (64%) compared to overnight UK visitors (58%).
- There was significant difference in the use of accommodation by new and repeat visitors. There was a far greater use of hotels by new visitors to Stoke-on-Trent (47%) than repeat (16%), but a higher use of B&B / Guesthouses by repeat visitors (39%) compared to new visitors (18%). There was a significant difference in VFR accommodation by new and repeat visitors (23% new, 39% repeat).
- Of the visitors staying overnight, (excluding those visitors staying on a narrow boat or with friends and relatives) 66 people commented on how they had booked their accommodation. 62% had pre-booked from home directly with the establishment. Much smaller numbers of visitors stated they had booked via the internet (8%) and only 2% en-route direct to the accommodation.
- One fifth (20%) of overseas visitors had pre-booked their accommodation via the internet, compared to only 2% of UK visitors.
- Over 8 out of 10 (84%) of visitors rated the value for money at accommodation as good / very good and 92% of visitors rated the quality of service provided as good/very good.

## Transport

- Stoke-on-Trent has seen a considerable increase in the use of the car since the original survey in 1994. In 2004 the figure has risen to 97%.
- The total proportion of visitors using public transport has varied across the four visitor surveys. In 2004, public transport accounted for only 2% of the transport market share, compared with 12% in 2000, 8% in 1997 and 4% in 1994.
- Amongst new and repeat visitors there was a difference in the use of all means of transport. There was greater use of the car/van/motorcycle/motor home for those visitors who had been before (98%) compared to newcomers. New visitors tended to use other types of transport more than repeat visitors.
- The majority (96%) used their car/van/motorcycle/motor home to travel within the City. Repeat visitors were more likely to use their car than new visitors (97% compared with 94%).

- Just under a fifth (19%) of visitors had used the city centre car parks, however, just over eight out of ten (81%) had not.
- Over a quarter (28%) had used the Potteries Shopping Centre car park to park their vehicle.
- Meigh Street and John Street car parks were the next most popular car parks used by visitors to Stoke-on-Trent by just under a fifth (18% and 17% respectively) of respondents.
- The majority (84%) of respondents stated that it was quite easy or very easy to park in Stoke-on-Trent.
- Encouragingly over half (52%) of respondents felt that the cost of parking in Stoke-on-Trent was reasonable or very reasonable.
- New visitors found the cost of car parking more favourable than repeat visitors with over half (57%) stating that the costs were reasonable to very reasonable and almost a third (30%) stating that the costs were average.

### **Sources of Information**

- Overall, only 4% of visitors indicated that they had personally visited Stoke-on-Trent Tourist Information Centre
- Almost a fifth (17%) stated that they did not seek any pre-trip information. Over two thirds (68%) had used a tourism leaflet or brochure and over a quarter (28%) had used a map of some type including ordinance survey and touring maps.
- Day visitors to Stoke-on-Trent used a wide variety of methods in order to plan their trip to Stoke-on-Trent, in particular tourism leaflets and brochures (32%). This was also the case for overseas visitors, 94% of whom used leaflets and brochures followed by 72% who used maps to plan their visit.

### **Activities Undertaken and Attractions**

- When the last survey was conducted in 2000 the most popular activity undertaken by visitors to Stoke-on-Trent was factory outlet shopping (65%), followed by eating and drinking at a restaurant or café (37%). In 2004 these activities have been reversed in terms of popularity, with restaurant and café usage rising to 86% and factory shopping falling to 50%.
- Shopping in the city centre has seen a slight rise from 17% of visitors to just over a fifth (22%) of visitors and visiting the Potteries and factory tours has seen a decrease from 28% in 2000 to 17% of visitors in 2004.

- Amongst all types of visitor to Stoke-on-Trent, visiting a restaurant or café was the most popular activity undertaken. Repeat visitors were slightly more likely to eat out (89%) than new visitors to the city (71%). Overseas respondents were more likely to state factory outlet shopping as their main activity (89%) and UK respondents liked to eat out in a restaurant or café (86%).
- Overseas (touring and overnight) visitors were more likely to undertake factory outlet shopping than any other type of visitor.
- The most well known attractions/locations were Royal Doulton (96%), The Wedgwood Visitor Centre (89%), The Wedgwood Factory Shop (83%) and The Spode Visitor Centre (78%) – but as mentioned before, it may be the brand rather than the visitor centre/ factory outlet that is being commented upon.
- In terms of previous visits, only Royal Doulton (62%), Wedgwood (Visitor Centre, 49% and Factory Shop, 47%) and the Potteries Shopping Centre (46%) had seen significant previous trips.
- The main attractions/locations being visited on this trip, although some intentions may not convert due to various reasons, such as time, weather, etc, included Royal Doulton (18%), Wedgwood Factory Shop (16%) the Potteries Shopping Centre (15%) and Spode Visitor Centre (11%).
- Moorcroft, with an average rating of 4.48 was the most highly rated attraction, closely followed by Etruria (4.45) and Gladstone Pottery Museum (4.45). However, a good number of locations received 4.2 to 4.4 ratings, and overall most of the scores come in highly – around 4.0 equates to 'good' ratings.

### Visitor Opinions

- Overall the range of attractions and places to visit were rated with an average (mean) score of 3.90 out of a possible 5.
- Over half (51%) of respondents stated that the range of places to eat and drink in Stoke-on-Trent was 'good' and a further quarter (23%) thought the range was 'very good'. Only a relatively small proportion (8%) thought that the range of places to eat and drink was 'poor' or 'very poor' giving an average mean score of 3.82.
- The average scores given by respondents were 3.95 for range of shops, 3.94 for quality of the shopping environment and 3.93 for the quality of service encountered. These scores were all an improvement on the last survey conducted in 2000 when scores were 3.92, 3.88 and 3.82 for range, environment and service respectively.
- When asked about finding their way around Stoke-on-Trent, the average scores given in each category were 3.33 for road signs, 3.20 for pedestrian signs, 3.00 for white and brown tourism signs and 3.52 for display maps and information boards (3.52).

- The average scores given for public toilets in Stoke-on-Trent were relatively high compared to other surveys in the region. Availability received an average score of 3.58 and cleanliness 3.82.
- Visitors were asked for opinions on the cleanliness of the streets in Stoke-on-Trent. The average score given was 3.76 out of a possible 5.00.
- The feeling of welcome received in Stoke-on-Trent gained the highest average score of the survey with 4.47; this was followed by the atmosphere of the city which received an average score of 4.42.
- Visitors were asked what they particularly liked about Stoke-on-Trent, 15% stated the factory outlet shops and 13% the Potteries and china. 13% of visitors thought that the people were friendly and 11% liked the shops.
- When asked about what spoilt their visit, over half (51%) of respondents stated nothing had spoilt their visit, and a further 17% did not know. Smaller proportions of visitors made specific comments including the lack of road signs (7%), traffic congestion (6%) and not enough signs for tourists (5%).

### **Expenditure**

- Over half (56%) of visitors' expenditure was spent on shopping in Stoke-on-Trent, a slight decrease on results seen in 2000 (58%). Accommodation has witnessed the greatest decline from 18% in 2000 to only 5% in 2004; this is a reflection on the decrease in overnight respondents.
- On average visitors to Stoke-on-Trent were **spending £100.43 per trip**.
- On average, a party of day visitors in Stoke-on-Trent spent £79.94. With an average day visiting party size of 2.7 people, the average expenditure rate per person is £29.61 during the day.
- The expenditure rate for a party of touring visitors (UK) was a little above that of day visitors, at an average of £124.00 per group. The average number of people per party was 2.9 giving a rate of £42.76 per person per day.
- The average expenditure rate for a party of overnight visitors (UK) was £255.53 per trip, with an average party size of 2.6 people, giving a spend per person per night of £98.28.
- The average spend estimated for all overseas visitors is calculated to be £157.65 per party for their whole trip to Stoke-on-Trent. With an average party size of 2.7 people, £58.39 was spent per head per trip to Stoke-on-Trent by overseas visitors.