Canterbury Connected

BUSINESS IMPROVEMENT DISTRICT

Canterbury City survey Research Report Spring 2017

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Fieldwork dates:	**14th June – 18th June 2017**
Report date:	**23rd June 2017**

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Background and Methodology

Latimer Appleby was commissioned by Canterbury Connected Business Improvement District (BID) to conduct research in the central area of Canterbury, in order to help better understand the behaviours of current users of the city.

The research took the form of an on-street survey, using electronic data collection devices to explore topics such as demographics, travel time and mode, visit motivation, dwell time, and visit frequency, as well as quantifying shopping spends. The research also gave an opportunity to assess the city centre on a series on more qualitative aspects using a series of ratings questions. Five locations were selected for sampling: St Peter's/High Street, St Margaret's, St Dunstan, King's Mile and Burgate, to allow for comparative analysis. One party in three was approached as a form of random sampling, and no demographic quotas were used in the interviewing process.

Where relevant comparisons are made in the report to a previous study which was carried out at a similar time of year in 2015, 2013 and 2011, using the same methodology and approach.

Fieldwork took place between 14th and 18th June 2017, to achieve a total sample of 350 interviews, with some 70 interviews taking place in each of the five sampling point locations.

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Key Findings

1. In total the sample again shows a familiar female skew (54%). Although we know this is less accentuated than we would expect from a typical 'shopper' survey, it is however consistent with previous surveys here in Canterbury city centre.
2. In age terms, the latest profile appears closer to the 2013 survey; however it is fair to say there is little significant variation across the age cohorts from one survey to the next. All in all we have a good mix across the age groups, with our largest segment being those aged 65+ (24%) and our smallest is again those aged 35-44 years (9%).
3. As far as social grade goes the proportion of ABs (44%) has jumped sharply from last time, whilst those defined as C1s (34%) has fallen. Again taken as whole our ABC1 respondents actually made up 77% of all those interviewed in 2017, again almost identical to previous years. The proportion of DEs (11%) increased this time but was still fewer than in 2013.
4. Party size (1.5) was slightly smaller than in 2013 and 2015 (both 1.6), but this is still close to a typical shopper survey average.
5. Looking at the demographics across the five sampling points, we can see that in 2017 the gender profile does show some variances, with more males in St Dunstan's (53%) and King's Mile (52%), and with more females in St Peter's/High Street (64%).

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Key Findings

6. The age profiles also show some differences between the different locations, with St Dunstan's appearing to have more of both our youngest (25%) and our oldest respondents (30%). King's Mile is generally younger, and St Margaret's is very close to the overall profile. Burgate and St Peter's/High Street both have fewer aged under 35s compared to the other groups.
7. In social grade terms ABs peak this year in St Margaret's (53%) and St Peter's/High Street (49%) but ABC1s as a whole are again quite consistent across the five sampling points.
8. Across the total sample our 'locals' (64%) again made up the largest segment, this was very similar to previous results. Our next biggest group was the 'day trippers/visitors' (17%), although they were fewer than in previous surveys. 'Locals' were least common in Burgate (56%) which along with St Margaret's had the highest number of 'day trippers'. The proportion of 'students' was highest in King's Mile (13%).
9. In total 40% were 'employed full time', which is consistent with previous research, whilst our next biggest group, those 'retired', made up 25%. This was more than in 2015 but closer to the 2011 survey. The highest proportions of 'retired' were to be found in St Dunstan's and St Peter's/High Street (both 29%). 'Students' (14%) again were the next largest segment overall and as we saw from the previous chart were more prevalent in King's Mile.

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10. Those who were 'alone' on the day of their interview (68%) made up a much larger proportion of our sample than ever before, and this will have reduced overall party size. Those who were on their own were to be found in even larger numbers in St Dunstan's (77%) than elsewhere. Those 'with their partners' were more common in Burgate (22%) and St Peter's/High Street (20%) than elsewhere (overall 18%), whilst those who were 'with friends' were more often to be found in St Margaret's and Burgate (both 10%) than the other areas.
11. Average travel time (27 minutes) fell once more and is actually at its lowest level across all four surveys, however of course once more it is well above a typical shopping centre average (18 mins). This reflects both the sample make up and the large Canterbury catchment.
12. In travel mode terms, those 'walking' were once more our biggest group (40%), identical to last time. Those travelling by 'car' (33%) were our next biggest group, but they are showing a longer term decline. 'Bus' use (14%) grew in this survey after the decline we saw in 2015, but is still smaller than the numbers we saw in 2011.
13. Around 3 out of 4 respondents (73%) were actually shopping on the day they were interviewed. This is a sharp fall vs. last time and the smallest proportion we've seen across all four surveys. This decline compared to 2015 is consistent across all locations and the proportion shopping is at its lowest everywhere except in St Peter's/High Street.

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14. For those shopping on the day of their interview, the average time spent shopping (98 minutes) is the shortest we've seen across all four surveys and this is a significant movement. Note: It is often too easy to blame the weather however it may be that the high temperatures during the fieldwork in 2017 have indeed impacted shopping dwell time.
15. Although the proportion shopping on the day has fallen to its lowest level and despite the short shopping dwell time, the proportion who say they ever shop for non-foods (97%) in Canterbury has in fact risen this time vs. 2015. We can see rises in all sampling locations except St Dunstan's, which is unchanged vs. 2015.
16. The proportion who claim they ever shop for groceries in Canterbury city centre (66%) also shows an increase over 2015, although this is still below the 2013 level (note: this was not measured in 2011). The rise vs. 2015 is consistent everywhere, with the single exception of Burgate.
17. The story is consistent again for the numbers who say they ever visit Canterbury for entertainment reasons. This is actually at its highest level and here the upward trend can be seen across all five locations.
18. Despite the rise in the numbers claiming to ever shop for non-foods, the average visit frequency for those that do shop (49 visits p.a.) shows a small decline from 2015 (52 visits). This is not however a big shift and visit frequency is still above both the 2011 and 2013 levels. The decline vs. 2015 is found at four out of five locations.

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19. The average visit frequency for grocery shopping in the city rose again this year to 81 trips per annum (up from 78 trips in 2015). Here again the positive movement is found in most sampling locations, the one exception here being St Margaret's.
20. The average visit frequency for entertainment in the city shows a rise to 42 trips per annum, a marked change from previous surveys. The biggest increases in visit frequency were in King's Mile and St Peter's/High Street, but elsewhere the changes were actually minor.
21. We again explored the main reason for visiting Canterbury on the day of the interview. This year we have a number of changes from previous surveys. Our largest group was those 'non-food shopping' (21%). These 'non-food shoppers' were more prevalent in St Margaret's (31%) than elsewhere, whilst there were a lot fewer in St Dunstan's and in Burgate (both 15%). Our next biggest group were those 'using a service' (13%), these were more common in St Dunstan's (19%) than elsewhere. 11% were 'just browsing', this figure being relatively consistent in all five locations. Those 'visiting the cathedral' (overall just 4%) were highest in Burgate (15%).
22. Exploring purchases by category, non-food conversion (53%) has risen again this time (47% in 2015), again of course this is despite the shorter dwell time this year. Again there were significant variances across the five sampling points, with rises in four of the five locations, St Dunstan's being the only one to fall.

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23. Grocery conversion (29%) also rose this year compared to 2015. This is again a significant shift (up 7 points) after the very steady figures we saw in the previous three surveys (a range of only 21%-23%). Again, the positive movement is seen in four out of five locations, with the biggest change seen in St Peter's/High Street 9up 16 points). This time the one area to show a decline was Burgate.
24. Entertainment conversion (note: here compared with catering conversion in 2011) increased slightly this year to 32%, but again there were both increases and decreases at the individual sampling points.
25. We generally expect to see spend rise with conversion. This year however we have a decline in non-food spend (£37.36), actually to its lowest level, as well as decline vs. 2015 in entertainment spend (£21.35). Entertainment spend whilst it is lower than 2015 is still above previous years. Average grocery spend (£17.59) in contrast has actually increased to its highest level seen to date.
26. Once more we explored where shoppers would have made their purchases today if they had not made them in Canterbury. Even more respondents (63%) than ever claim to only shop in Canterbury. My local town is still the biggest competitor (9%) but has again fallen in comparison to previous surveys here. Westwood Cross (8%) is the next most popular destination, whilst online (7%) is back up to the 2013 level.

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27. As before we looked at ratings for the city centre across a number of criteria. The highest scores were achieved for 'pleasant atmosphere' 94% (very good/quite good), and ‘choice of restaurants and cafés (92%). Overall once again four criteria scored 90% or higher, with two in the 80s and two in the 70s. ‘Cleanliness’ (76%) and ‘signposting’ (77%) were again the poorest scorers.
28. We also looked at several ratings specifically at the five sample points.
    - 'Choice of shops' scored 54% overall (very good/quite good) which was slightly down once again vs. last time. Weakest scoring areas were St Margaret’s and St Dunstan's. King's Mile (69%) scored the highest once again.
    - 'Safety/security' (84%) was little changed compared to 2015 but weaker than 2013. St Dunstan's again scored poorest, with the top scorers being King’s Mile and St Margaret’s.
    - 'Cleanliness' (75%) fell slightly from 2015, but is at a very similar level as 2011. St Dunstan's is again the lowest scorer, with Burgate the highest.
    - 'Service in the shops' (86%) also shows no real movement from 2015. The range of scores was quite narrow, the lowest rated areas being St Dunstan’s and St Margaret’s with King’s Mile rated highest, but no area scored below 83%.
    - ‘Signposting' (71%) showed a solid increase vs. 2015 (up 6 points) and actually this got its highest rating overall. The low was in St Dunstan’s and the high scorers were King’s Mile and St Margaret’s.

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29. We also asked questions about the market. As before, the higher scores were achieved for 'friendly service' (83%) and 'location' (82%), and all in all scores appear to be some of the better ones we've seen across the different surveys.
30. Asked how the market could be improved (as an open ended question), the responses included similar themes as in previous surveys. The issues this year were around the variety of stalls, the range and quality of the products sold, a desire for more locally-sourced goods and suggestions for better layout and/or use of available space.
31. Our overall satisfaction score was 93% (right in line with previous findings). The range of results was quite narrow but the best scorers were St Margaret's and King's Mile (98% and 97% respectively).
32. The desire for changes in the retail mix again shows few major changes across the four surveys, however the most popular demand this time is for 'more menswear' (17%), ahead of 'more ladieswear' (13%). Amongst those who would like to see changes the most common theme – within other changes (55%) – was yet again 'more independents'.
33. Service-related changes showed a similar pattern to previous surveys. The strongest demand was once again for 'cheaper parking' (22%), with more asking for this than last time. The next most popular requests were equally for 'more entertainment' and 'open late at night' (both 13%). Amongst other service changes the wide range of topics here included cleanliness issues, traffic management, need for more/better seating and signage.

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Key Findings

34. We retained the new questions added in 2015 about My Canterbury. Awareness of MyCanterbury was 28% overall (up 2 percentage points).
35. For those aware of My Canterbury the most common methods of communication this year were ‘social media’ (26%) ahead of ‘someone I know’ (18%). ‘Shop window stickers’ which had been significant in 2015 were not a factor in this survey.

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Gender & Age profiles

(n = all respondents)

	Spring 11	Spring 13	Spring 15	Spring 17	GB popn.
Male	43%	45%	44%	46%	48%
Female	57%	55%	56%	54%	52%
18-24 years	20%	18%	21%	19%	14%
25-34 years	16%	13%	15%	11%	20%
35-44 years	8%	9%	10%	9%	18%
45-54 years	19%	15%	15%	17%	16%
55-64 years	19%	19%	20%	21%	12%
65 years+	18%	26%	17%	24%	20%

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Social Grade profile and Average Party Size

(n = all respondents)

	Spring 11	Spring 13	Spring 15	Spring 17	GB popn.
AB	36%	36%	25%	44%	21%
C1	42%	42%	53%	34%	28%
C2	12%	10%	14%	11%	22%
DE	10%	12%	8%	11%	29%
Party size	1.8	1.6	1.6	1.5	-

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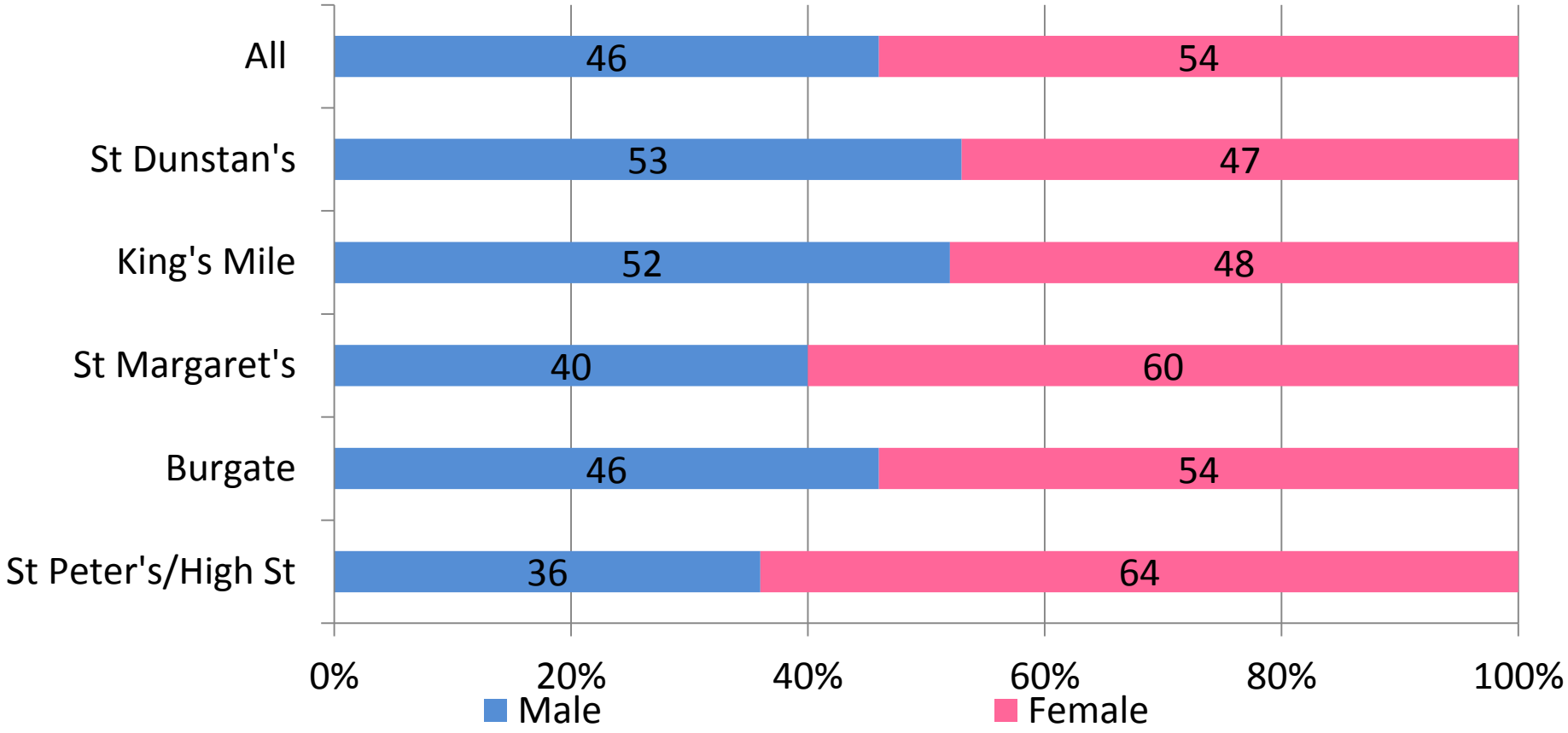
Gender profile (Spring 17)

Respondents by gender

(n = all respondents)



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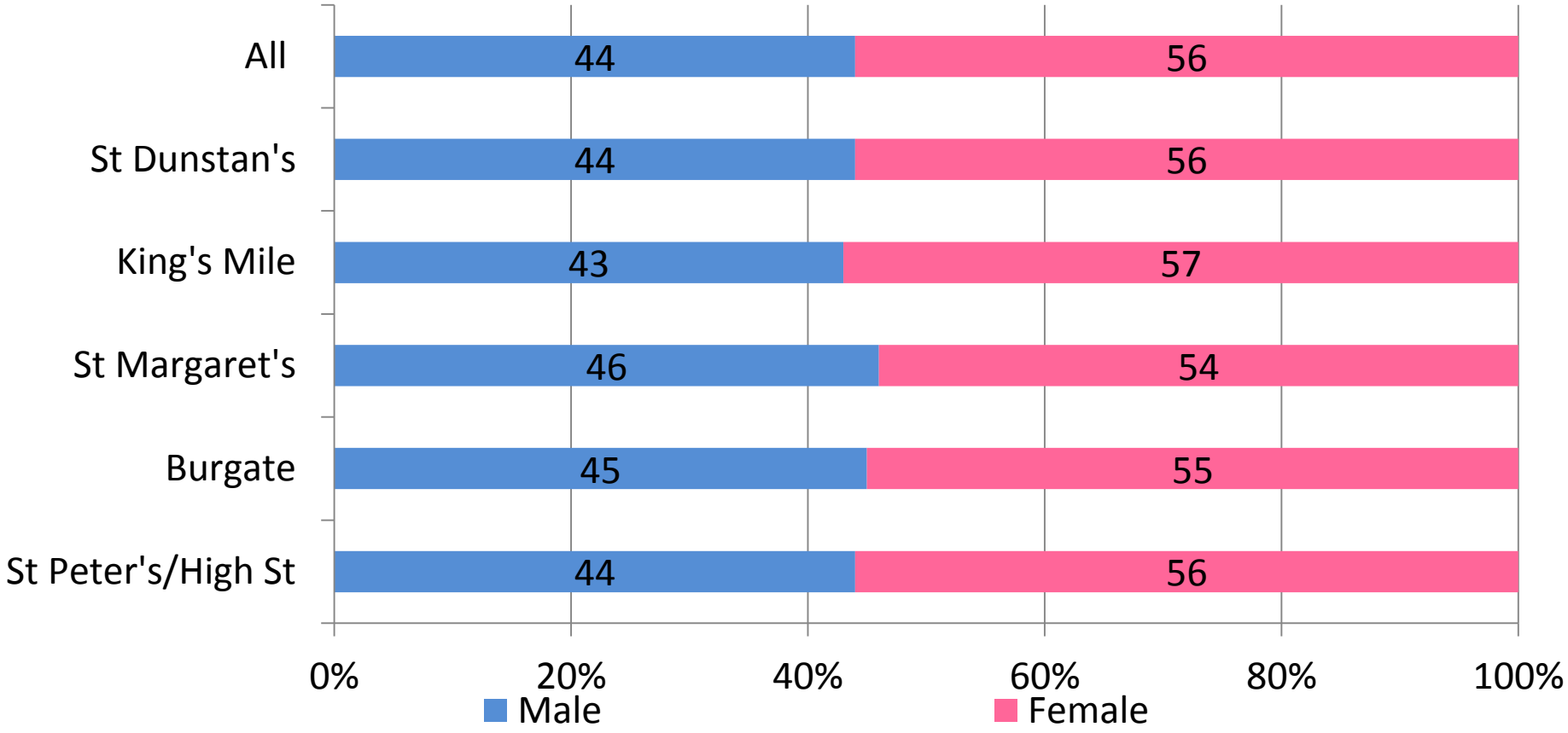
Gender profile (Spring 15)

Respondents by gender

(n = all respondents)



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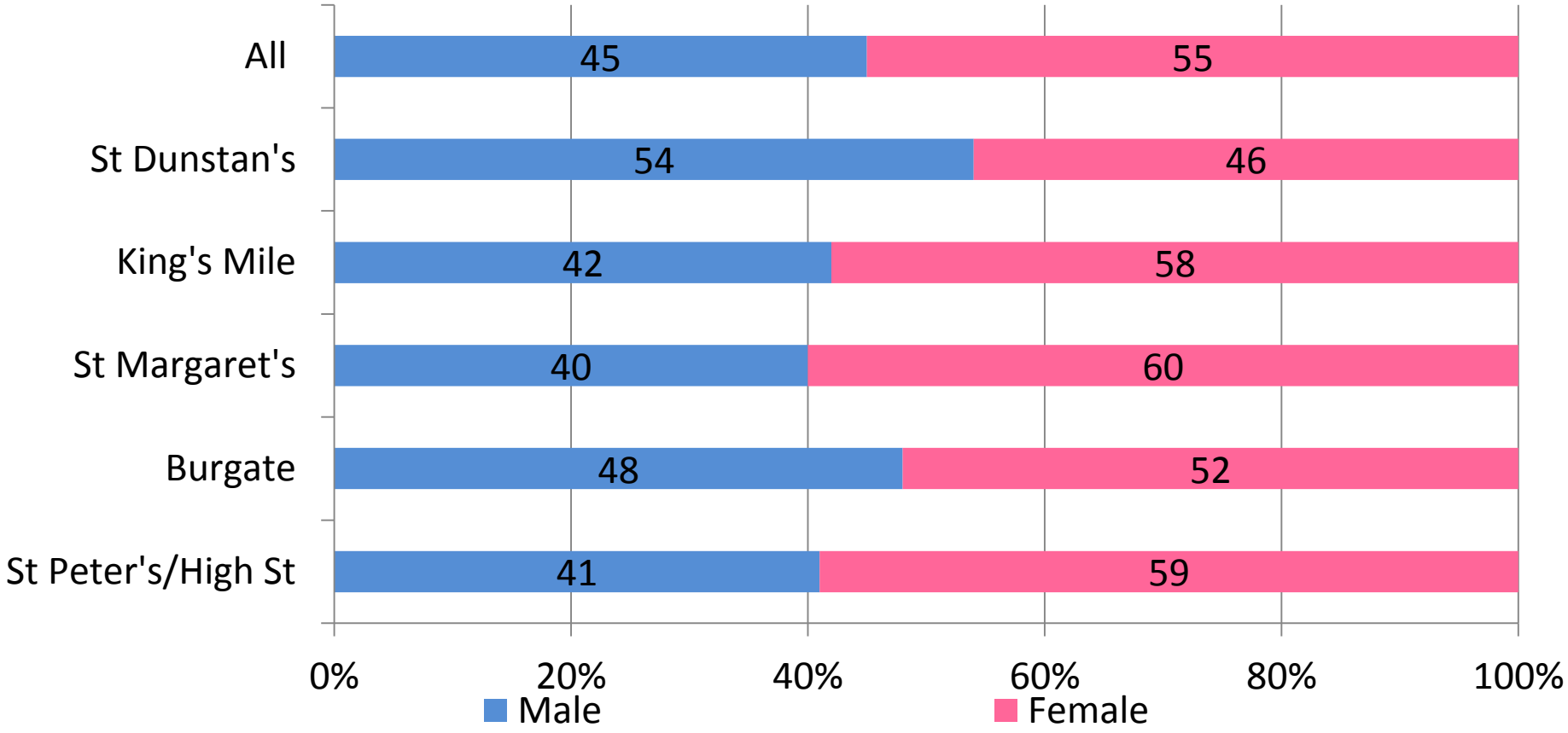
Gender profile (Spring 13)

Respondents by gender

(n = all respondents)



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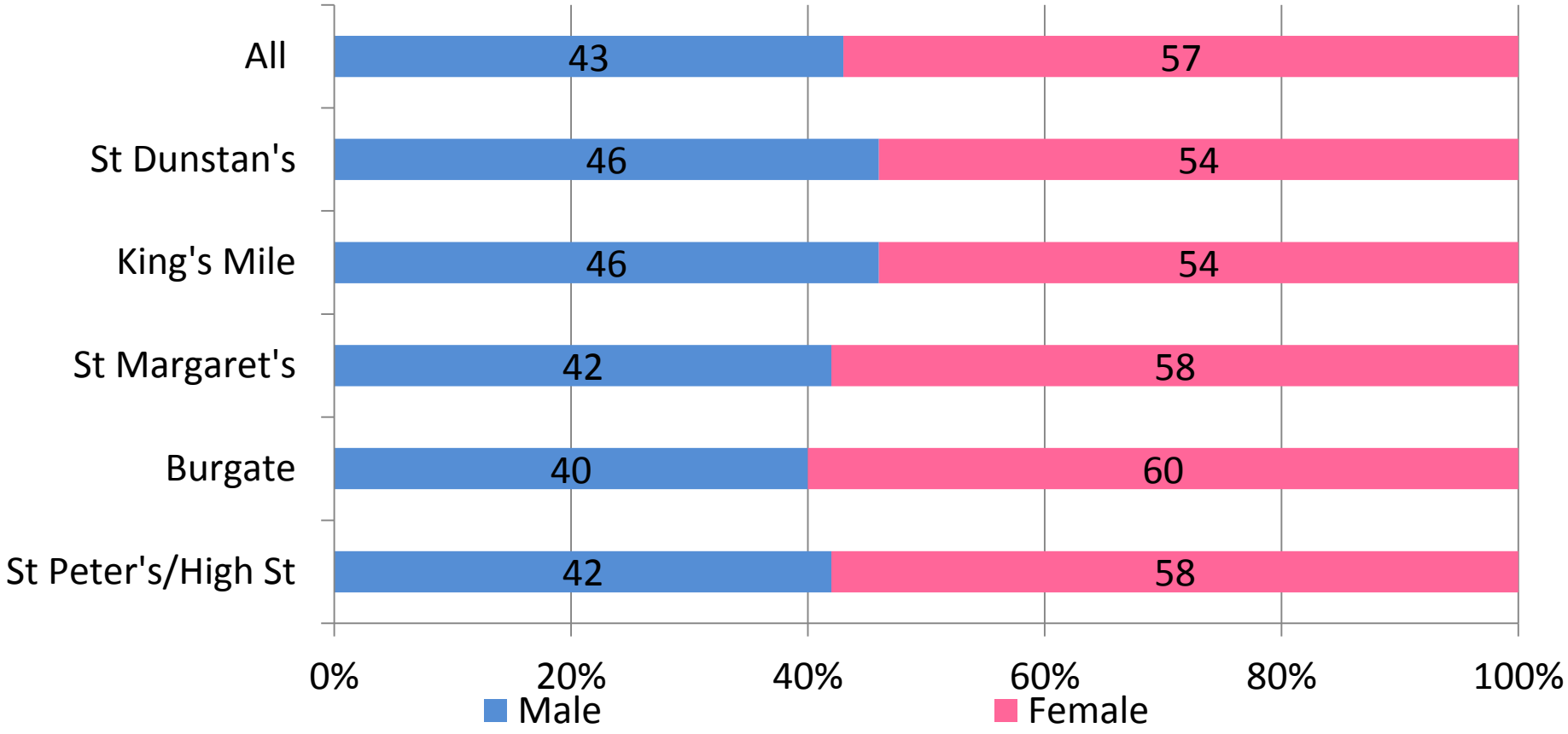
Gender profile (Spring 11)

Respondents by gender

(n = all respondents)



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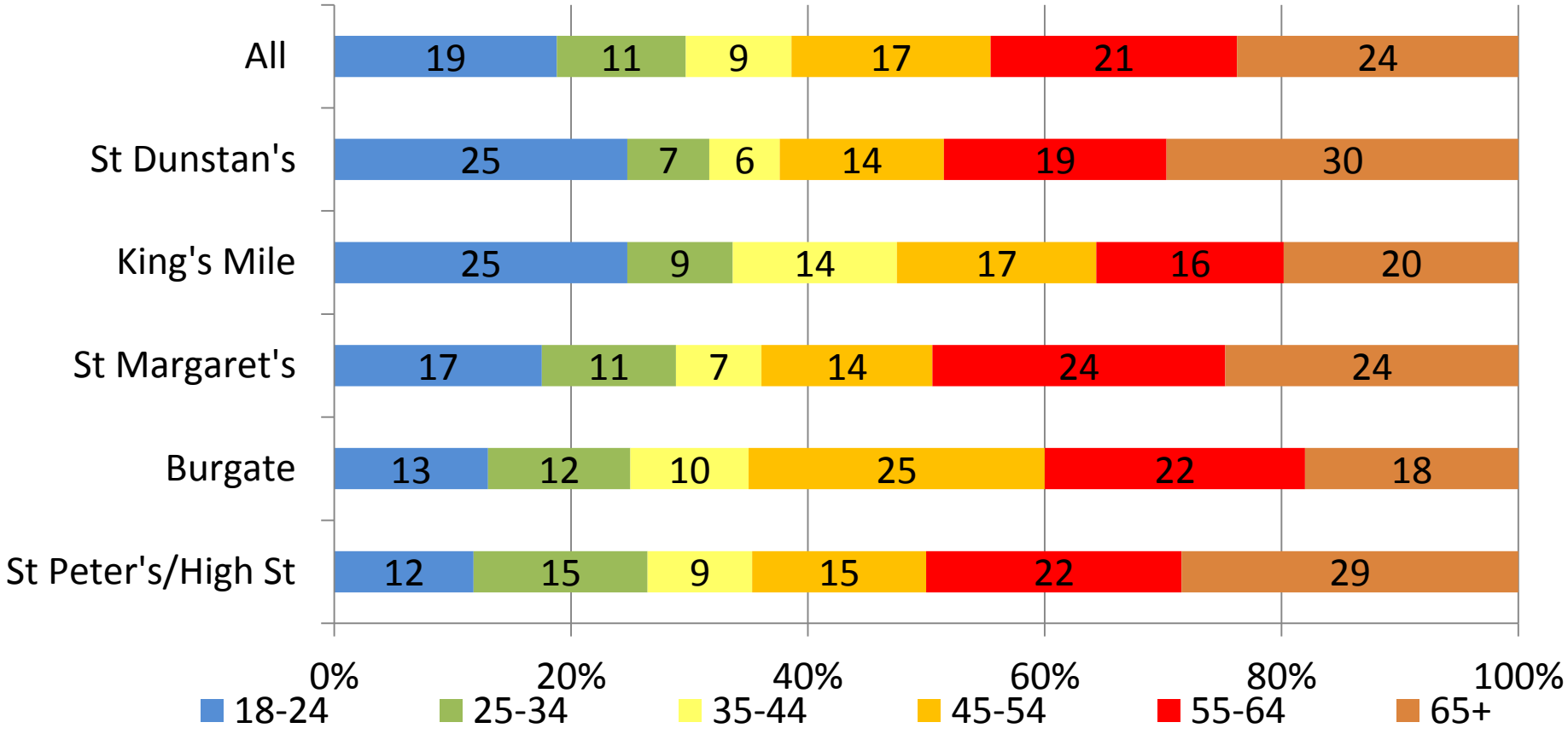
Age profile (Spring 17)

Please tell me your age?

(n = all respondents)



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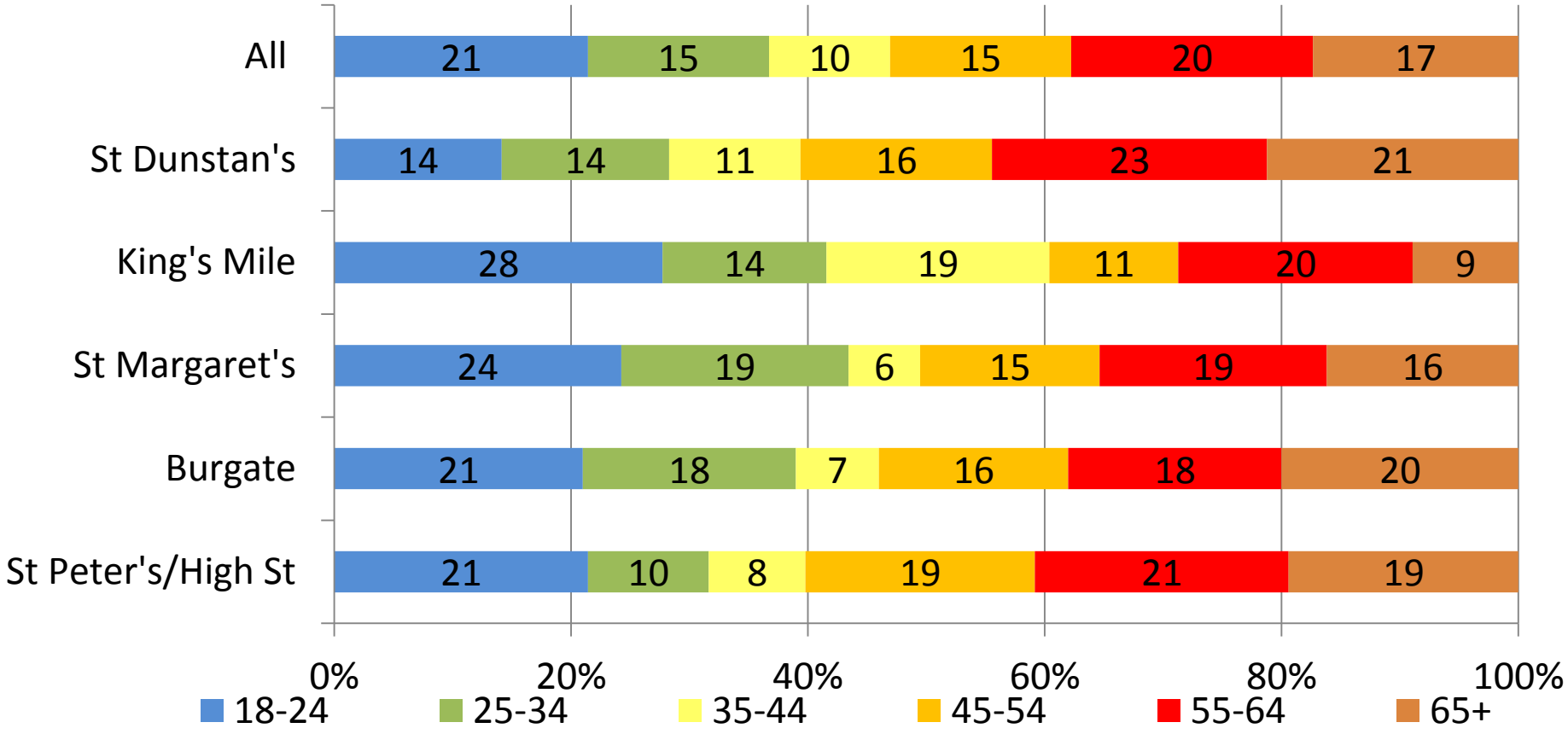
Age profile (Spring 15)

Please tell me your age?

(n = all respondents)



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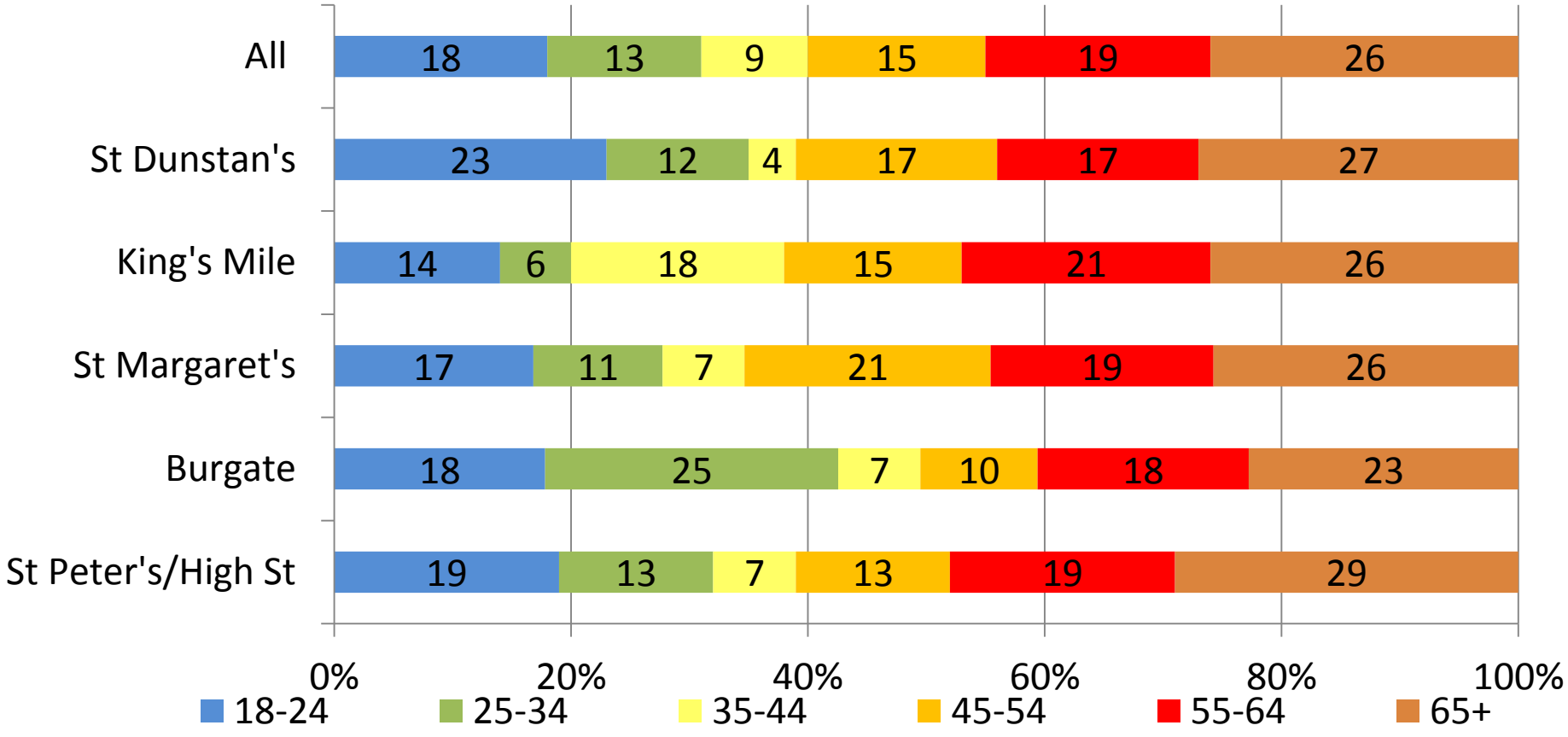
Age profile (Spring 13)

Please tell me your age?

(n = all respondents)



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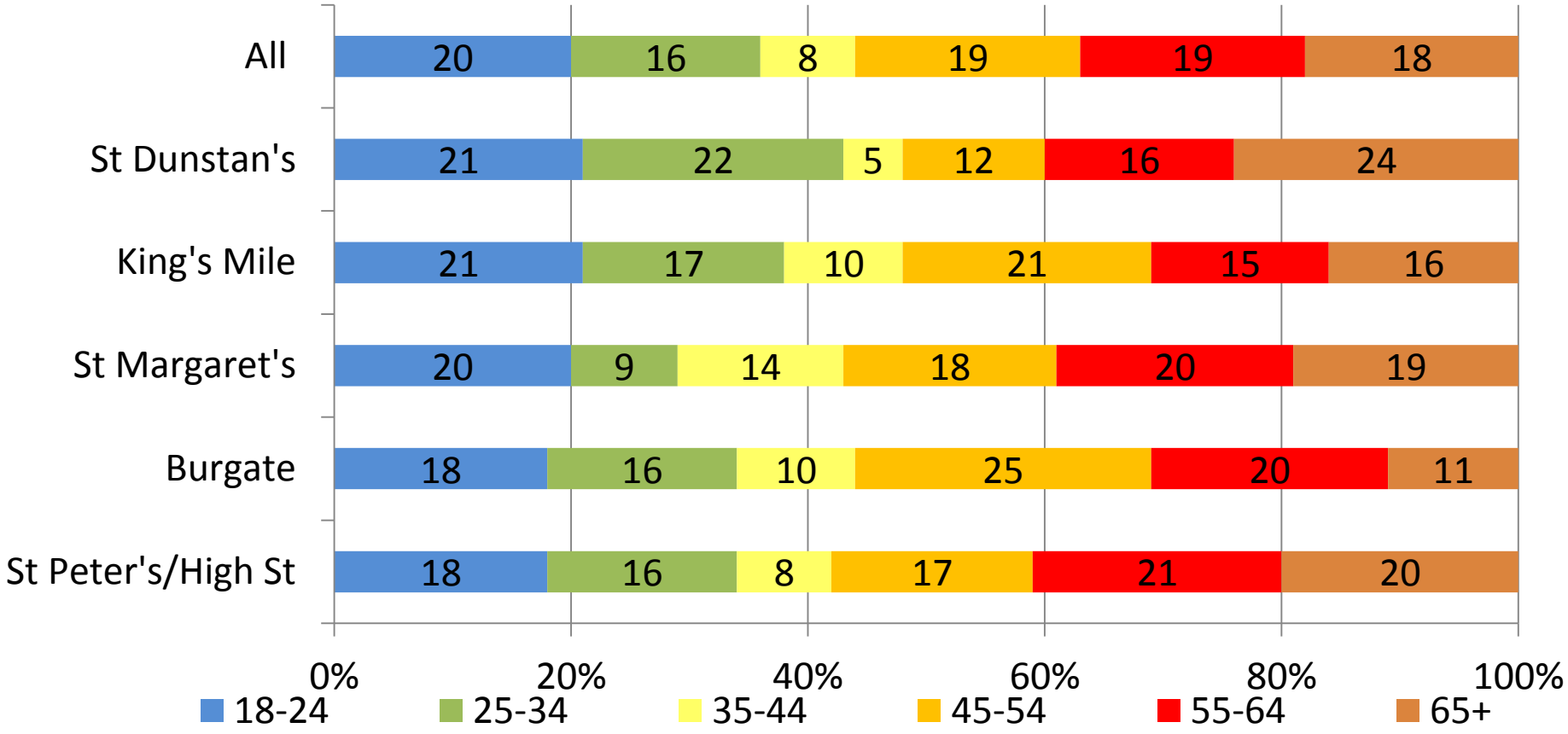
Age profile (Spring 11)

Please tell me your age?

(n = all respondents)



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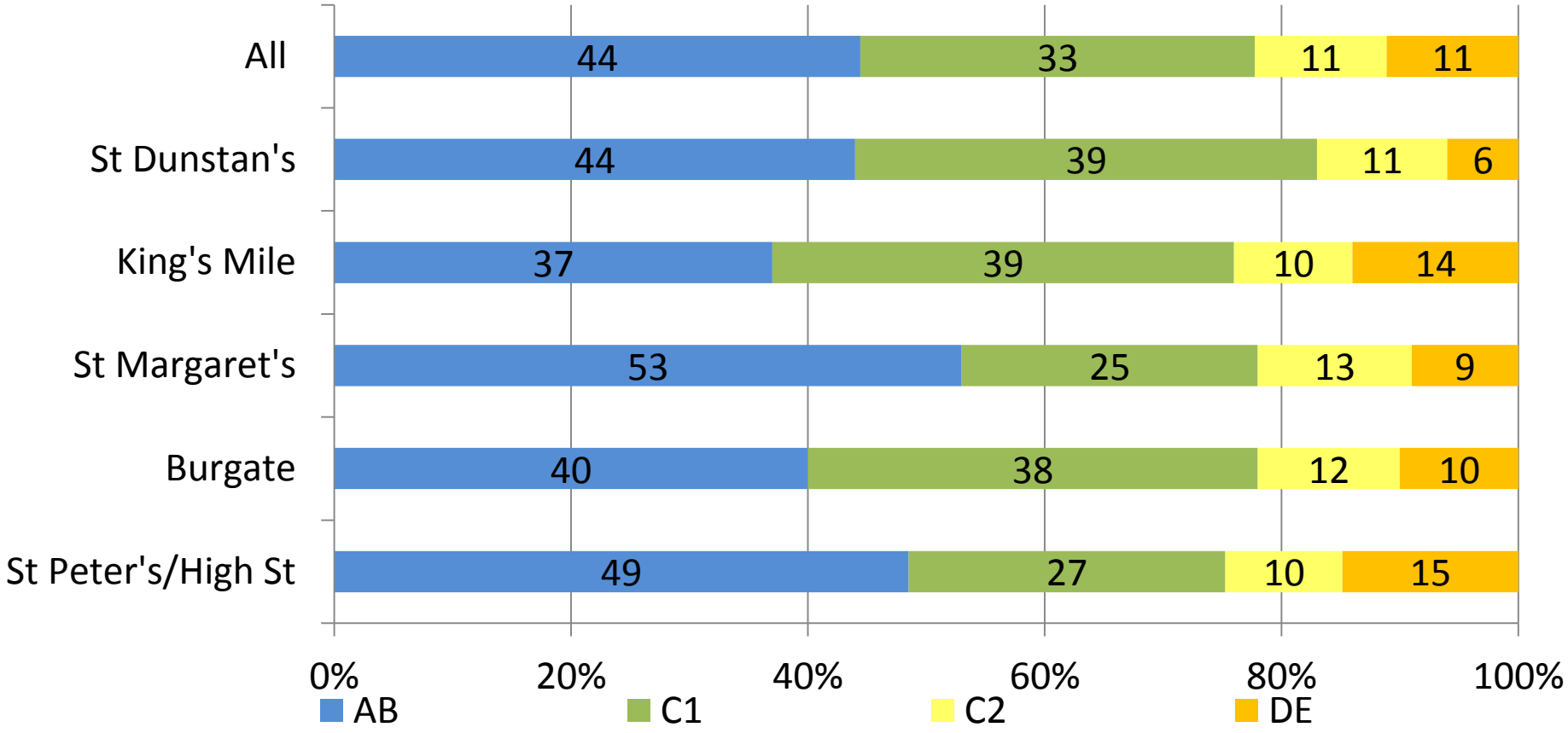
Social grade (Spring 17)

Respondents by SEG profile

(n = all respondents)



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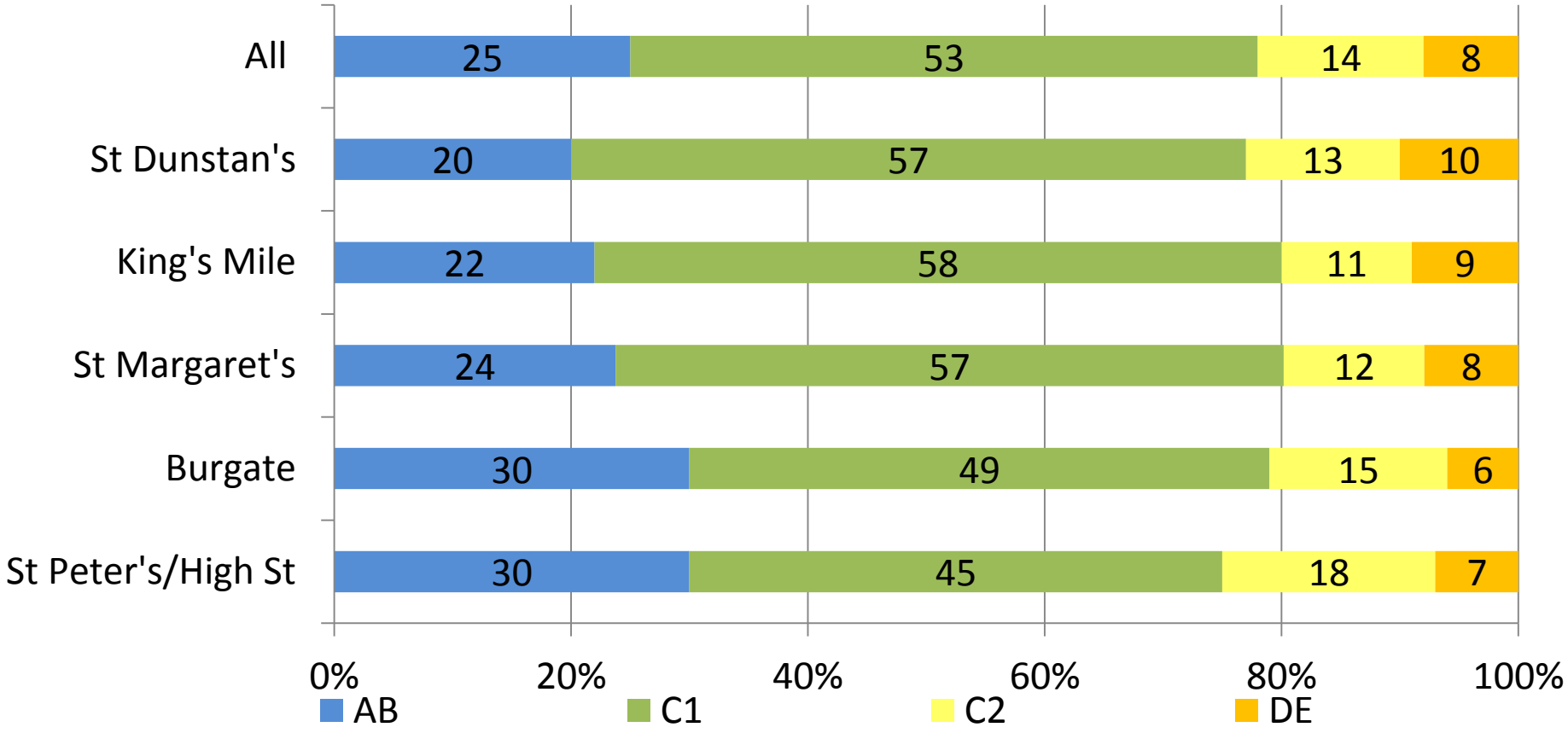
Social grade (Spring 15)

Respondents by SEG profile

(n = all respondents)



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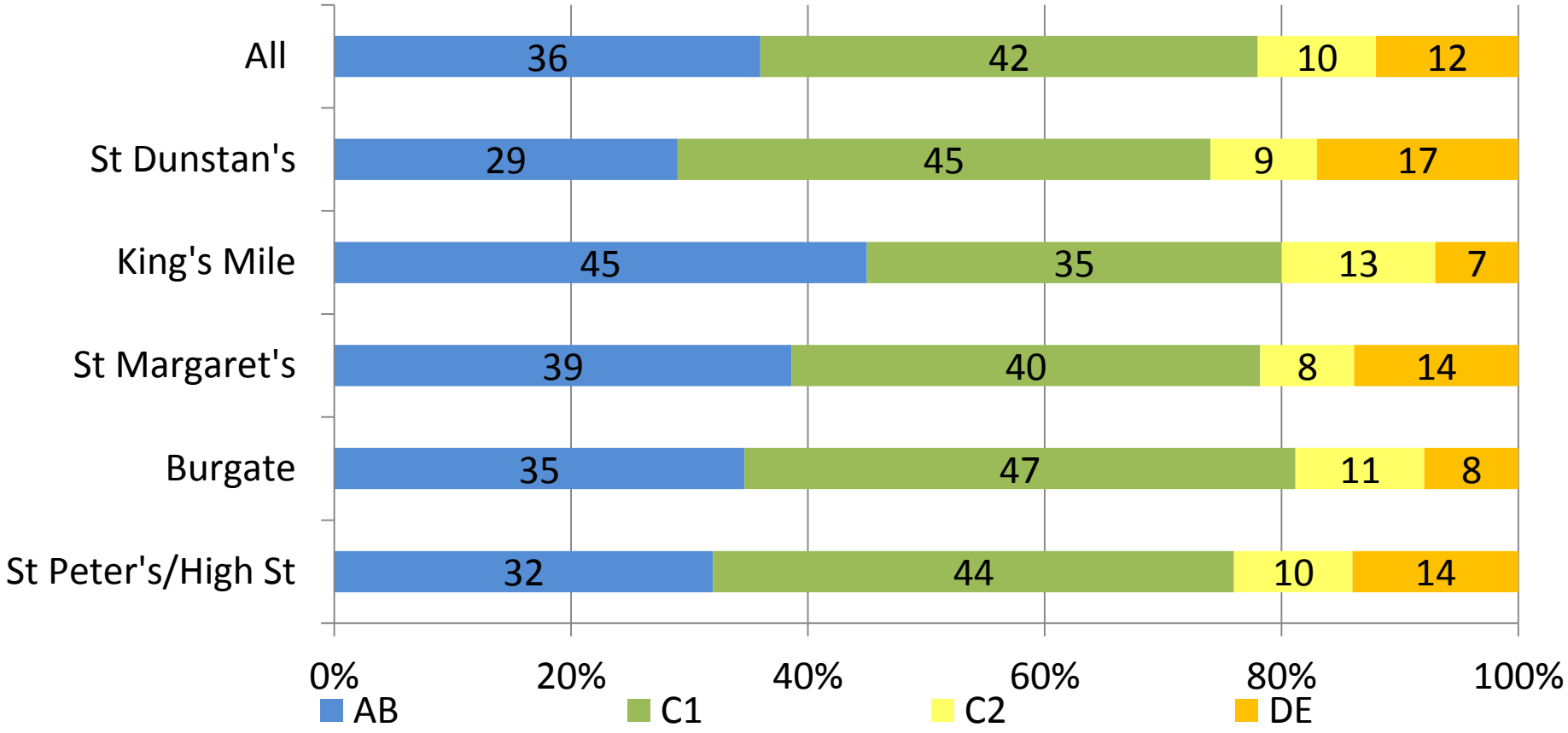
Social grade (Spring 13)

Respondents by SEG profile

(n = all respondents)



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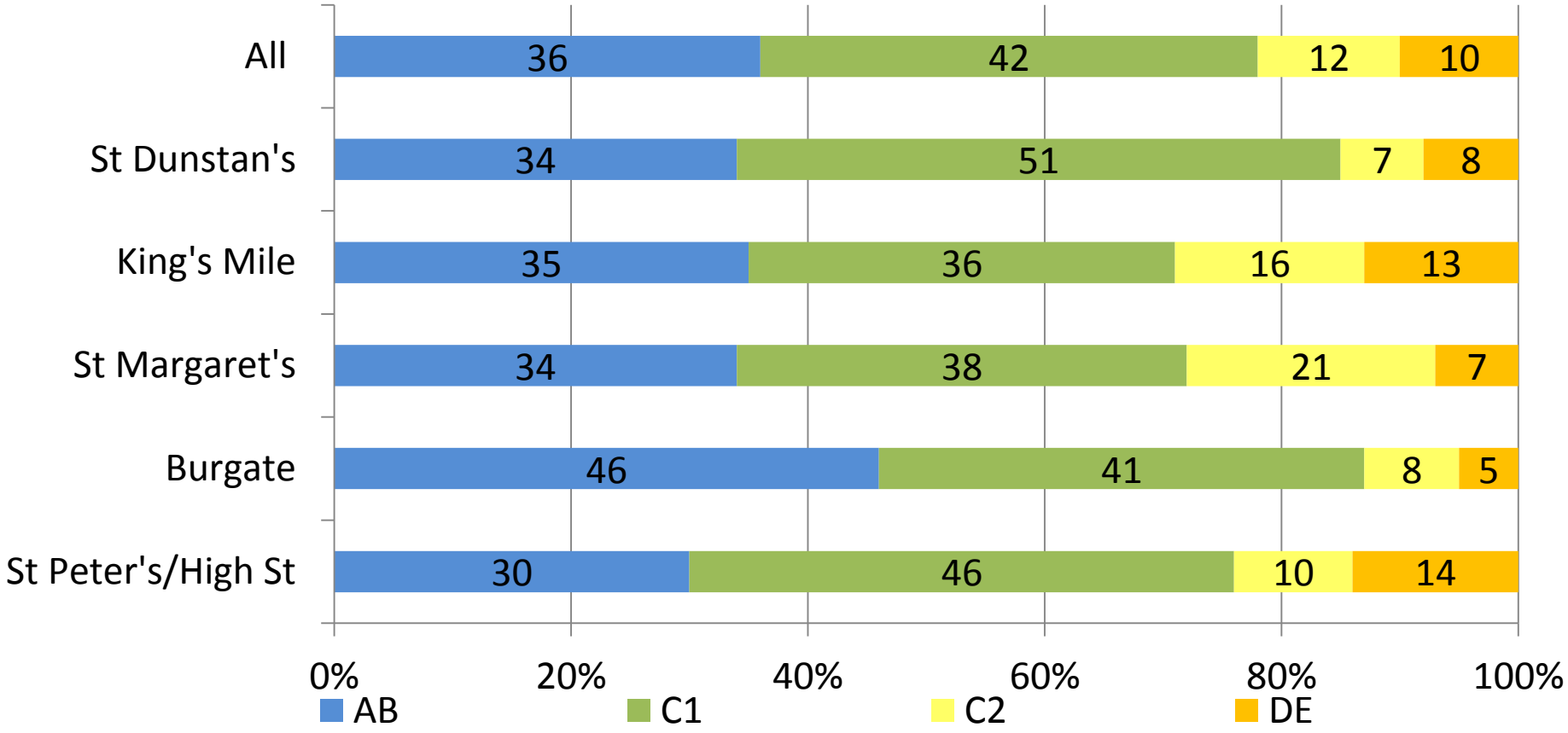
Social grade (Spring 11)

Respondents by SEG profile

(n = all respondents)



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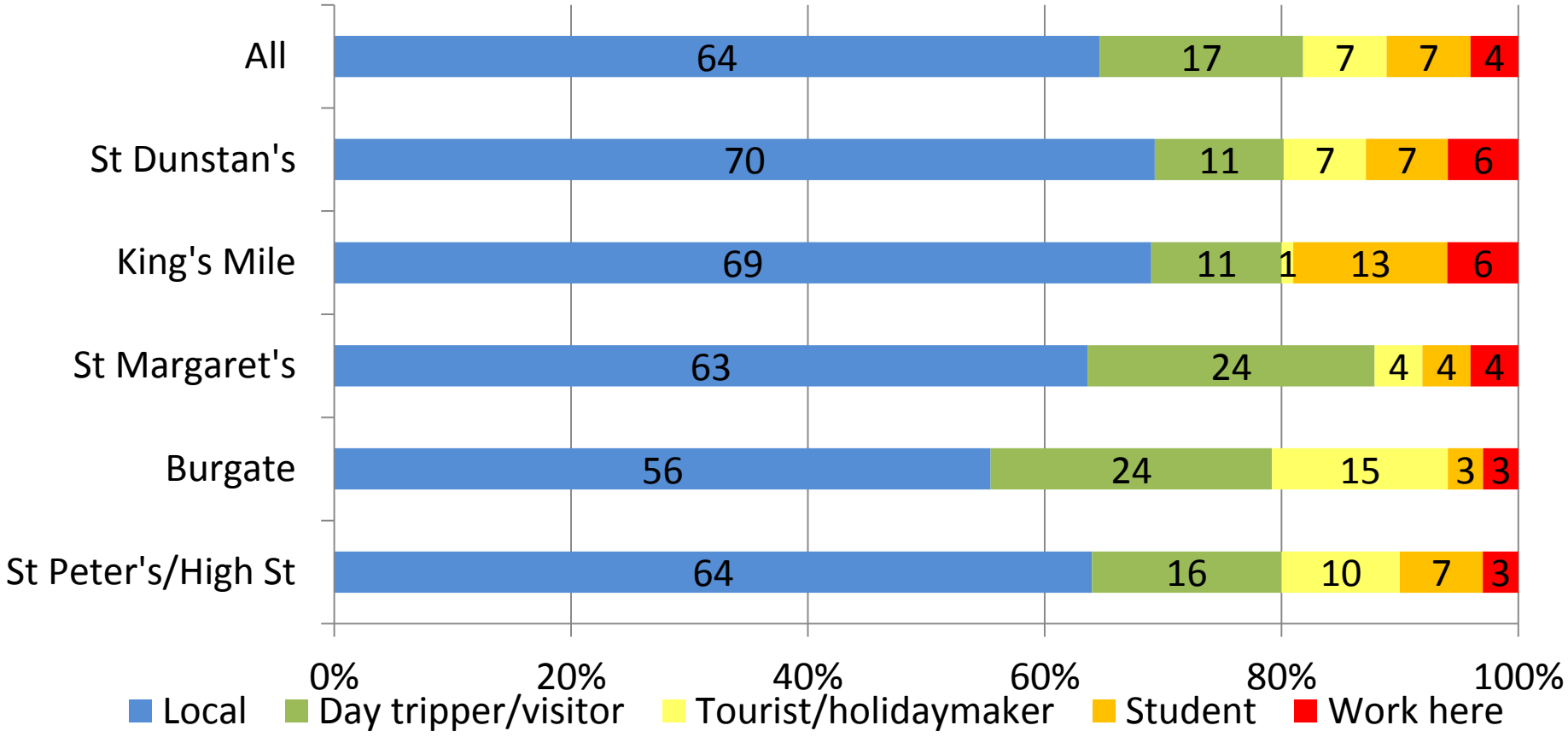
Respondent Description (Spring 17)

Which of these best describes you?

(n = all respondents)



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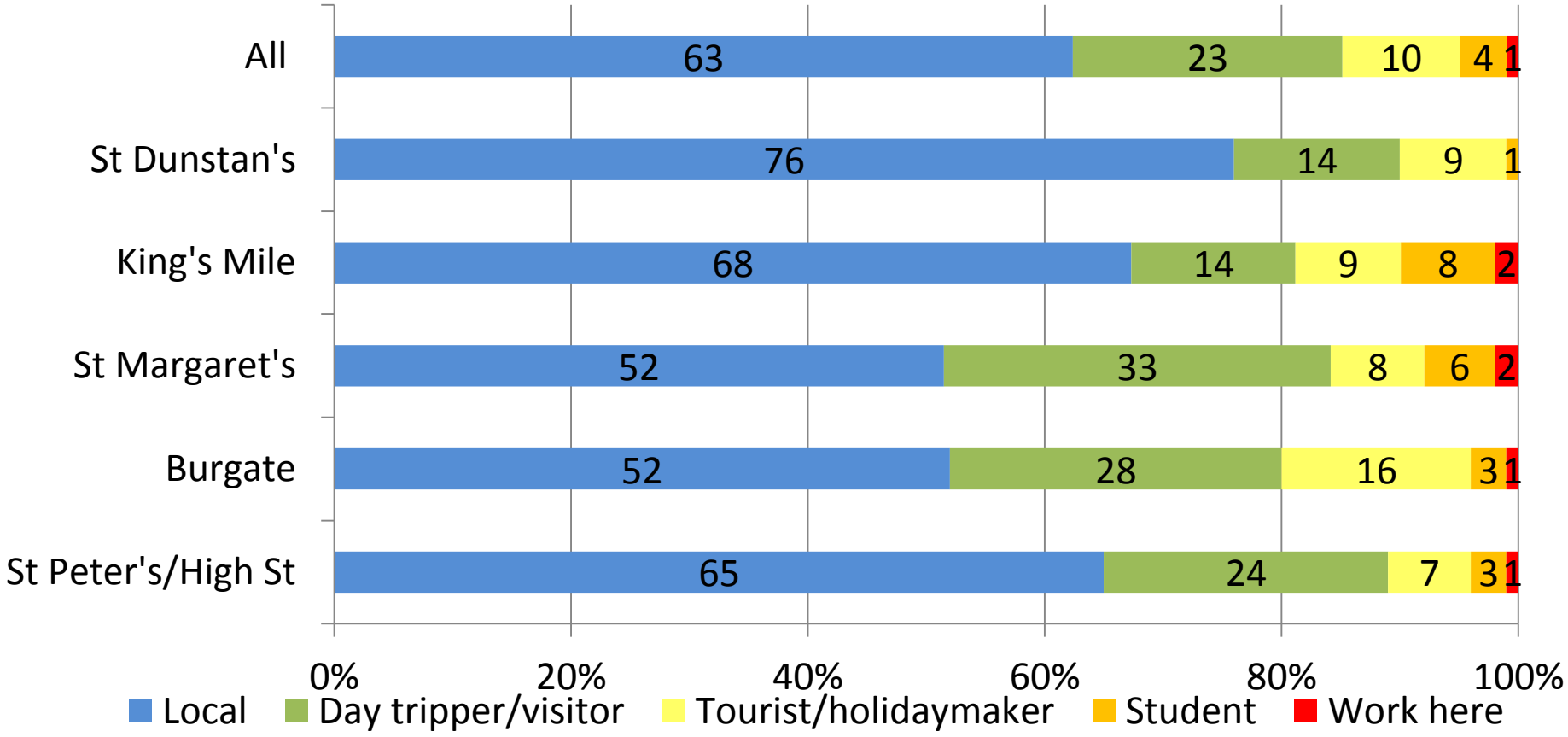
Respondent Description (Spring 15)

Which of these best describes you?

(n = all respondents)



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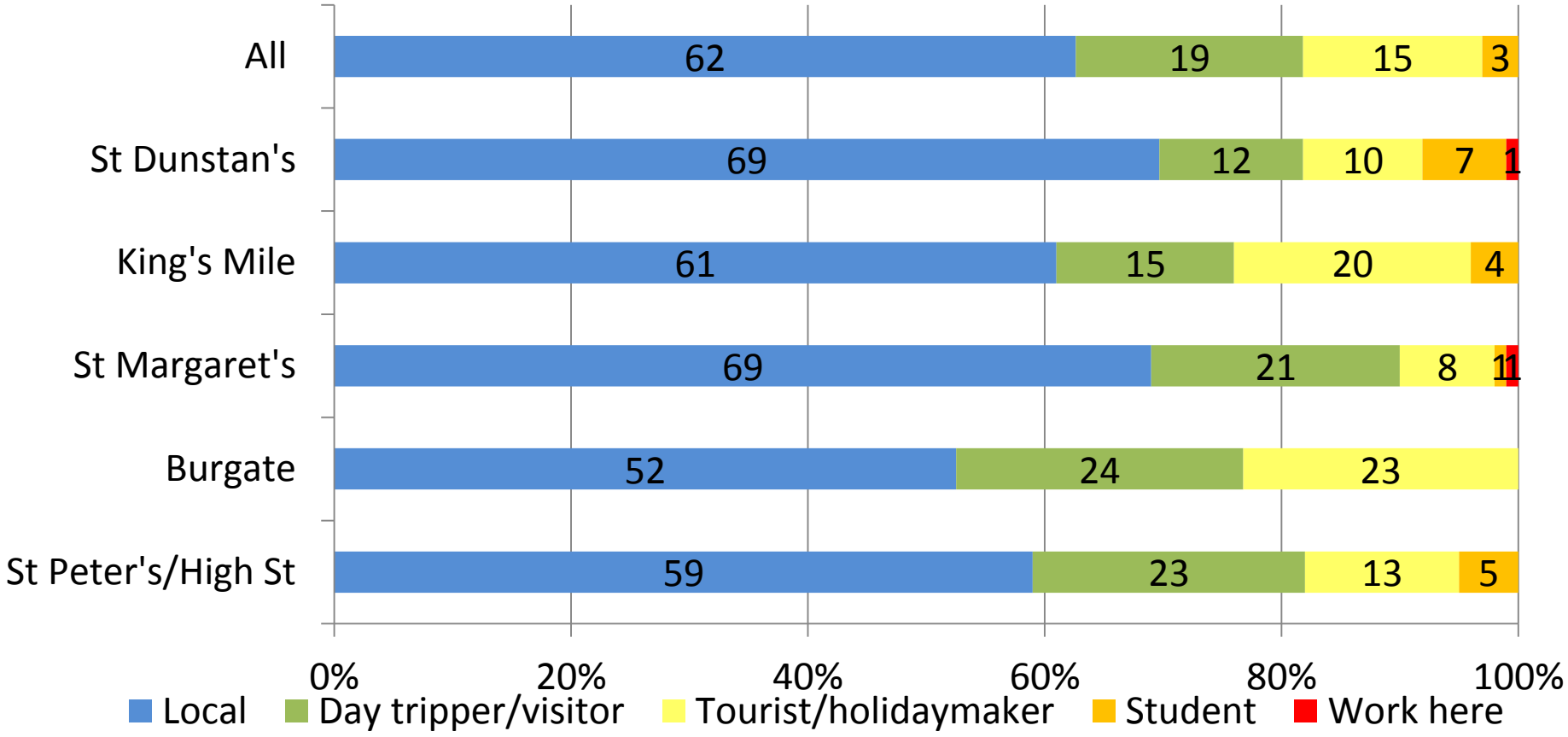
Respondent Description (Spring 13)

Which of these best describes you?

(n = all respondents)



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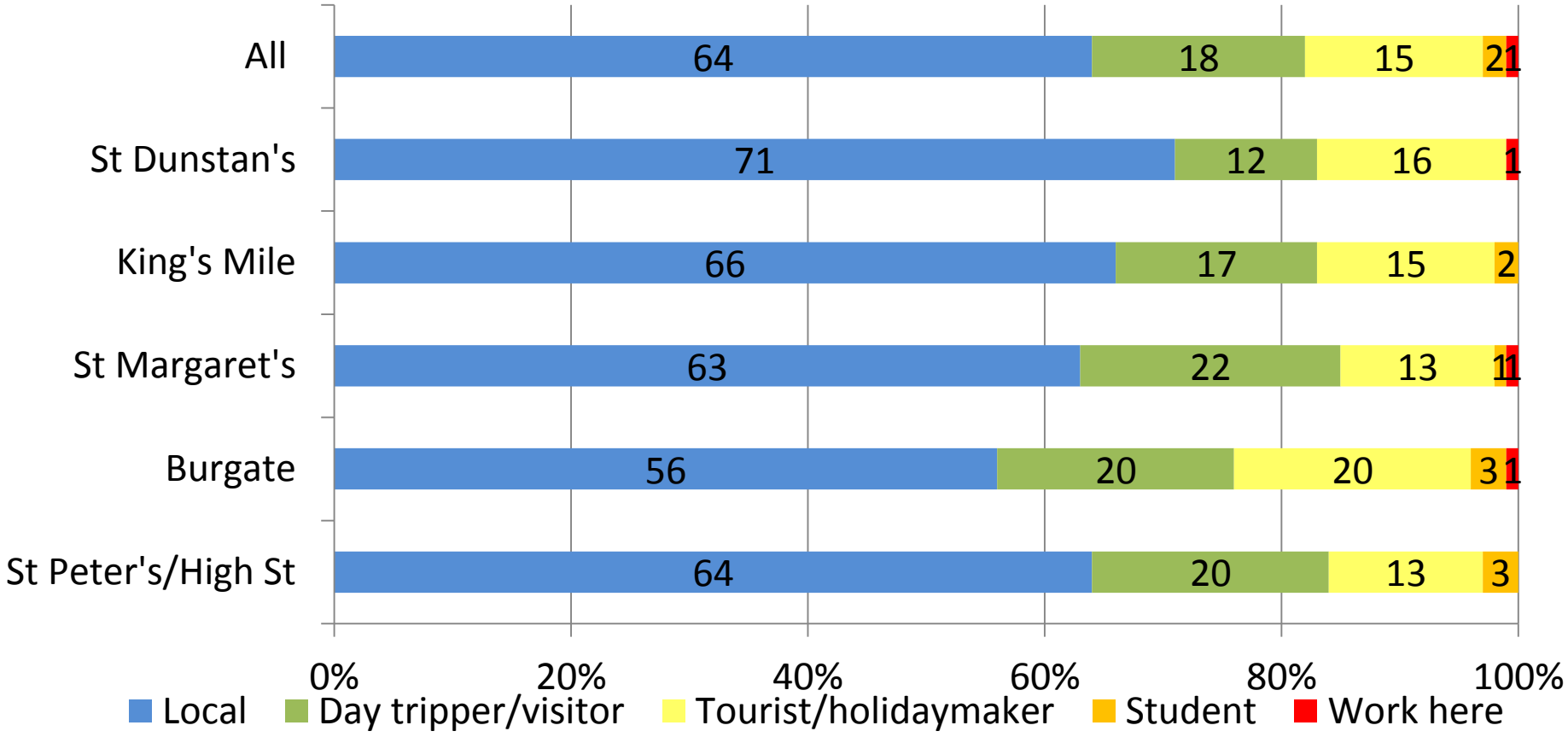
Respondent Description (Spring 11)

Which of these best describes you?

(n = all respondents)



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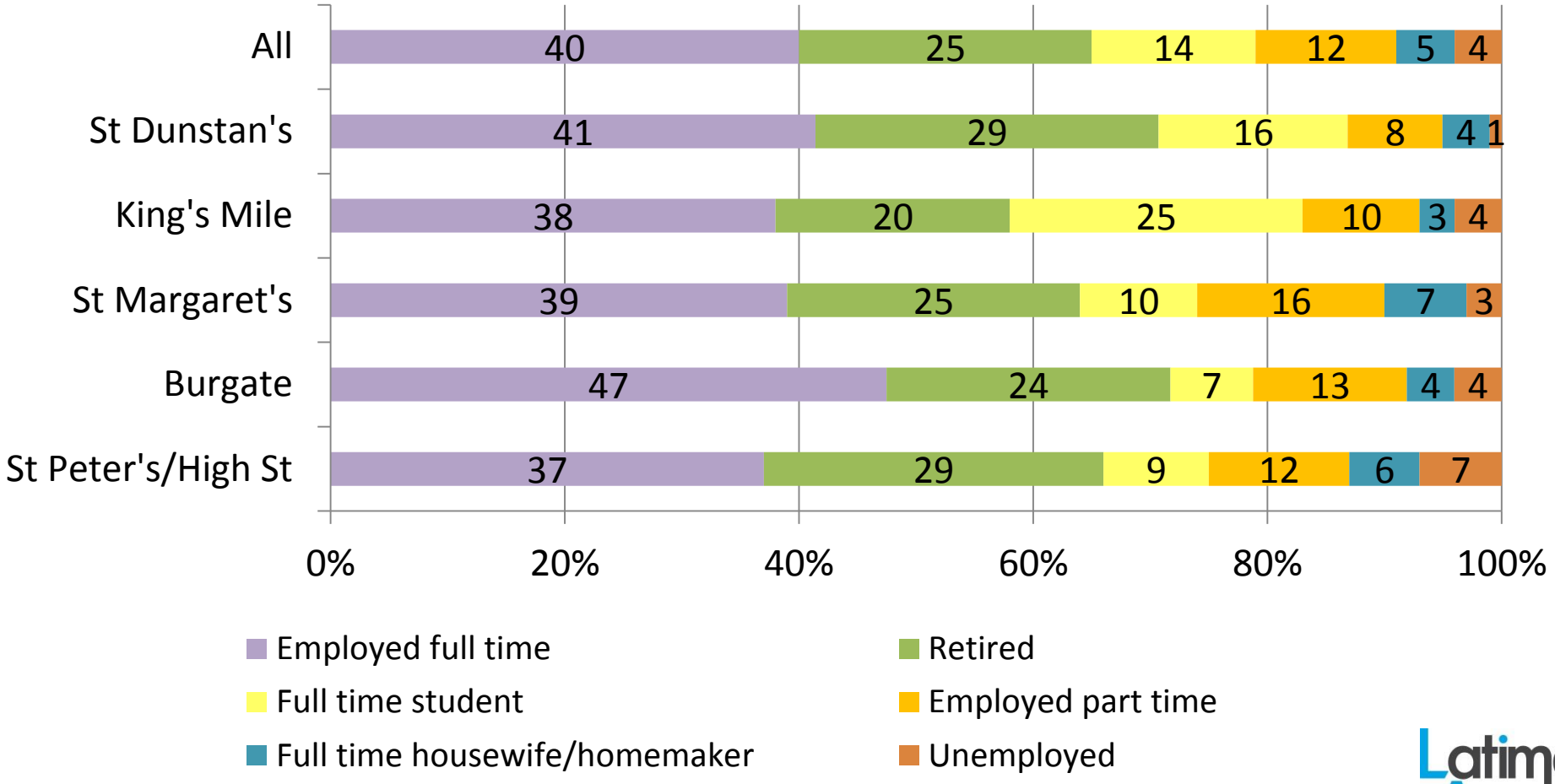
Personal Description (Spring 17)

Which of these best describes you?

(n = all respondents)



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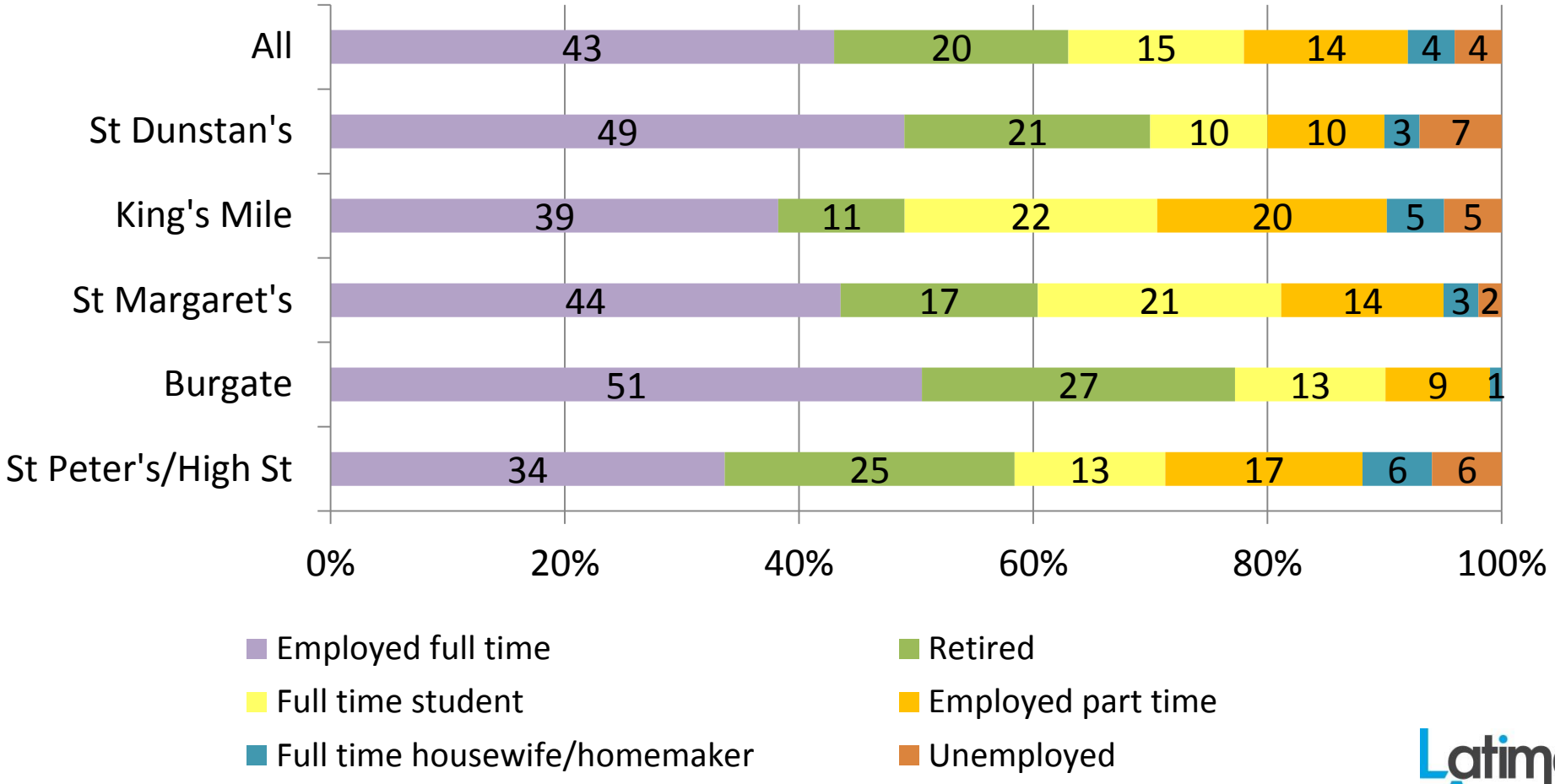
Personal Description (Spring 15)

Which of these best describes you?

(n = all respondents)



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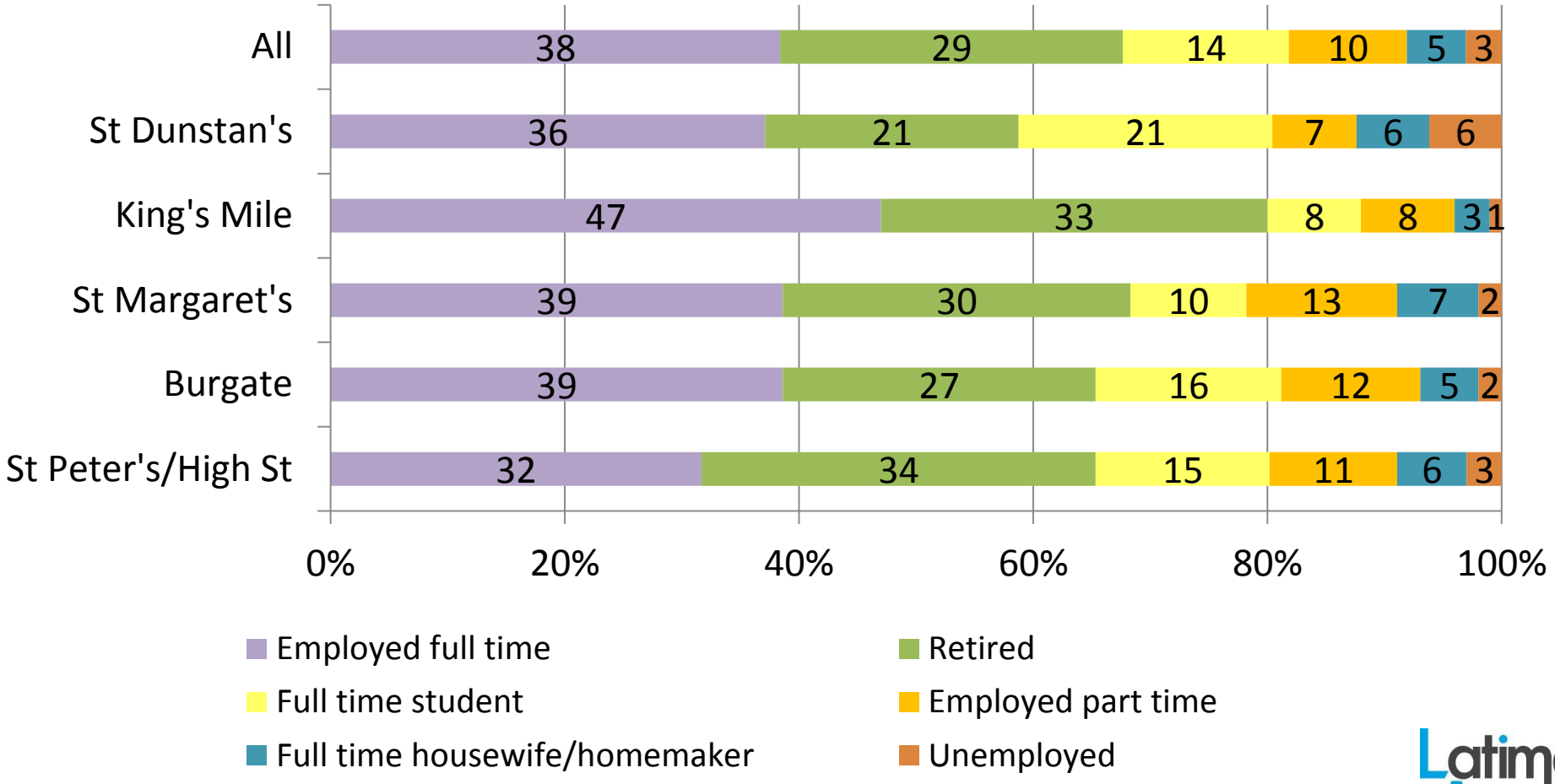
Personal Description (Spring 13)

Which of these best describes you?

(n = all respondents)



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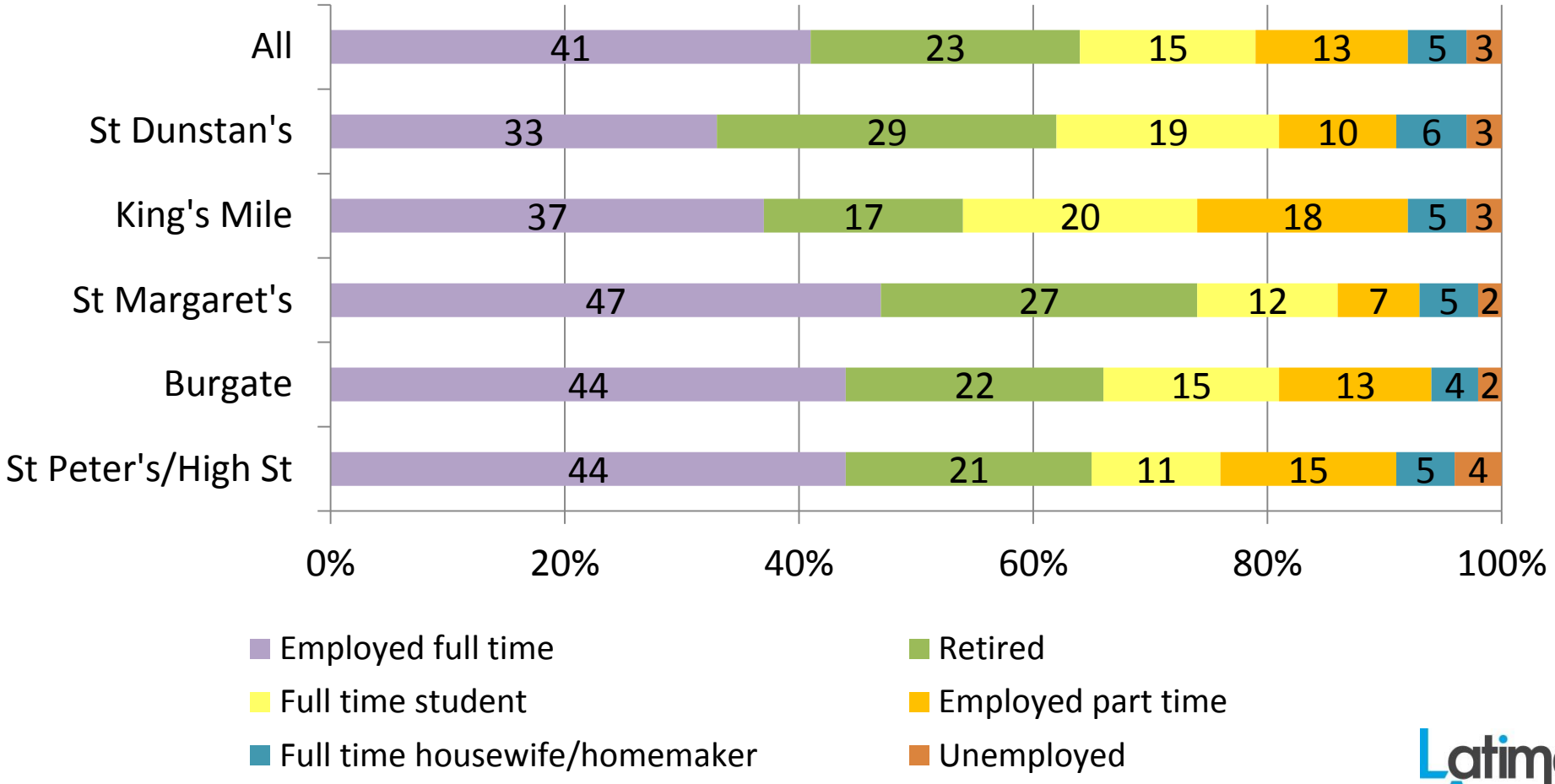
Personal Description (Spring 11)

Which of these best describes you?

(n = all respondents)



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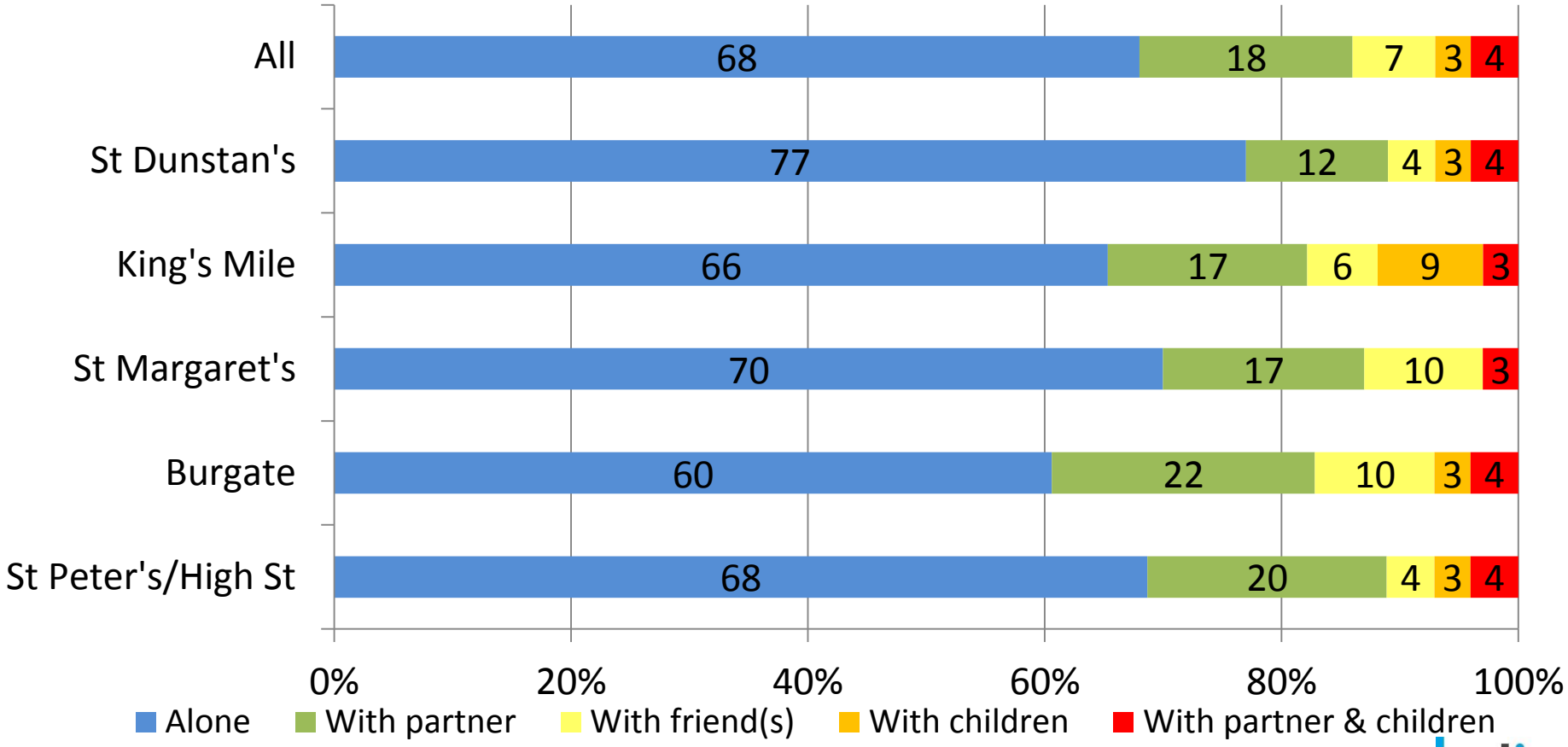
Party Description (Spring 17)

Who are you with today?

(n = all respondents)



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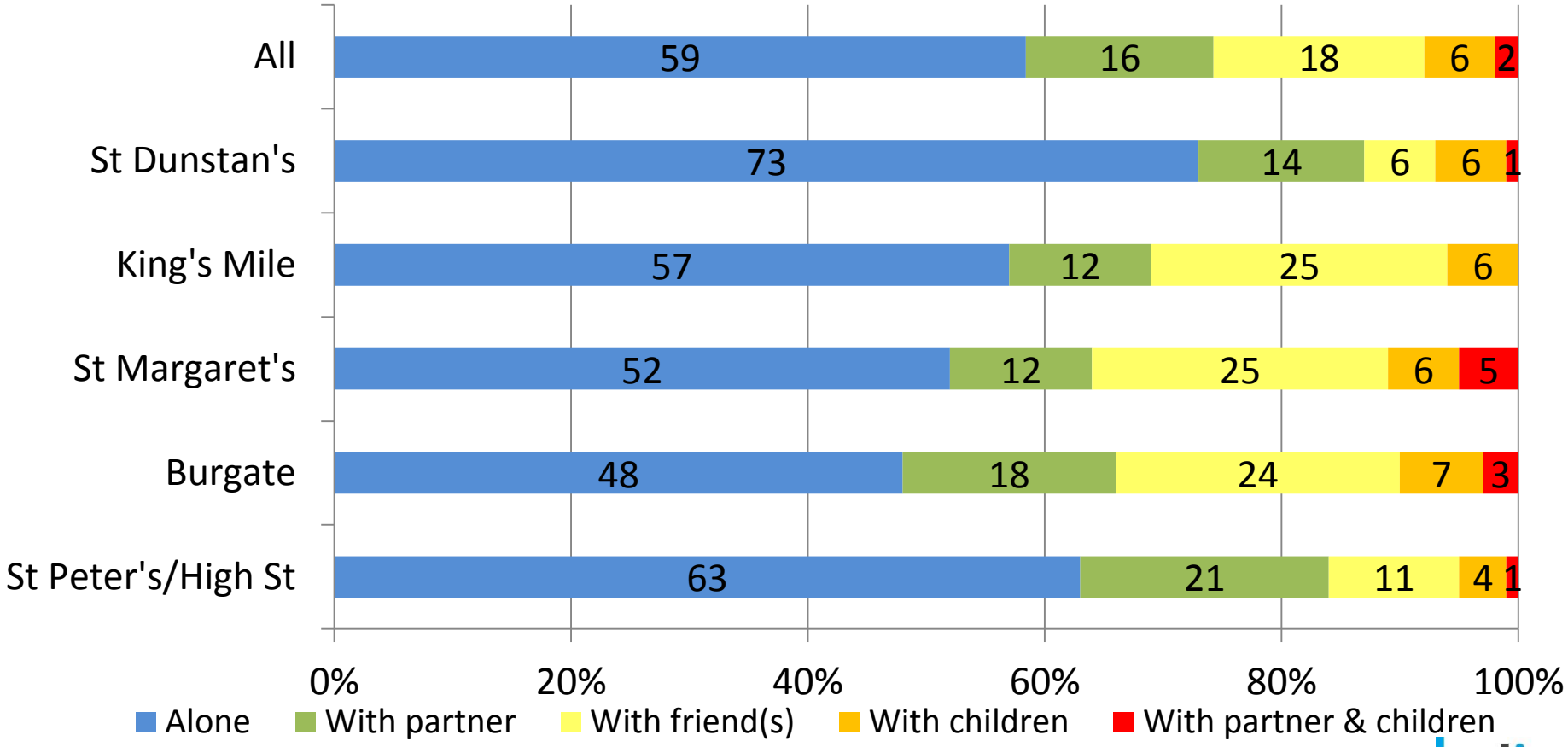
Party Description (Spring 15)

Who are you with today?

(n = all respondents)



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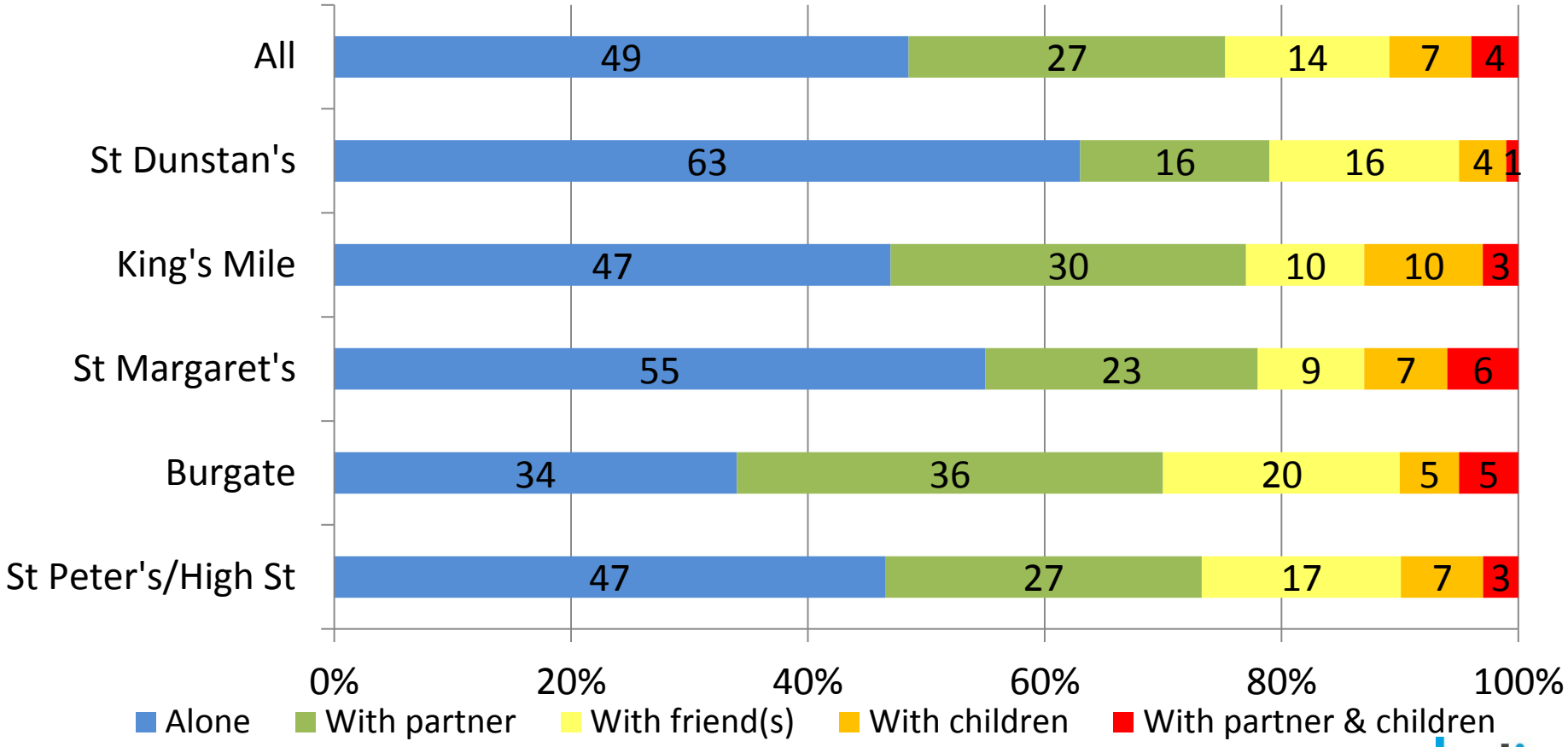
Party Description (Spring 13)

Who are you with today?

(n = all respondents)



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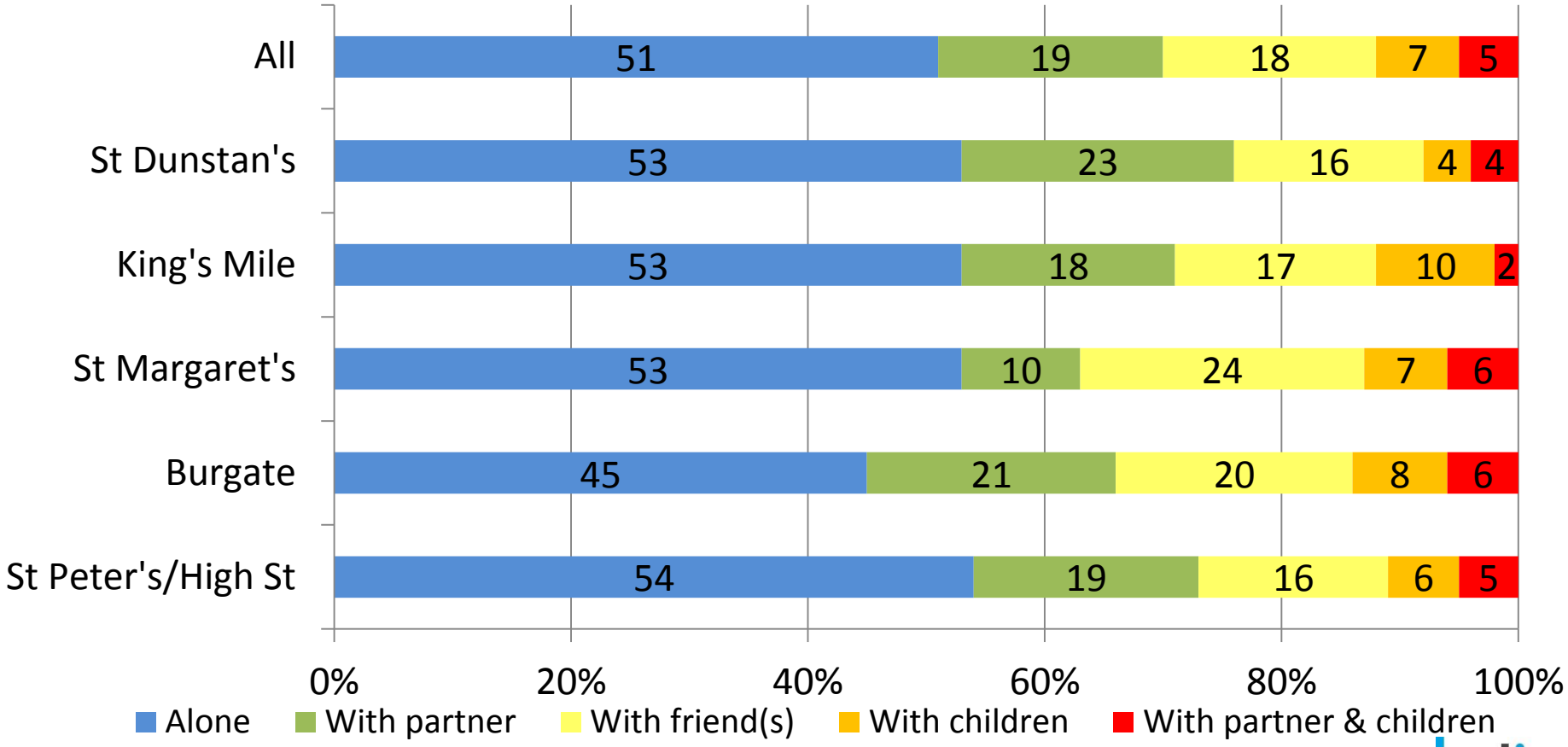
Party Description (Spring 11)

Who are you with today?

(n = all respondents)



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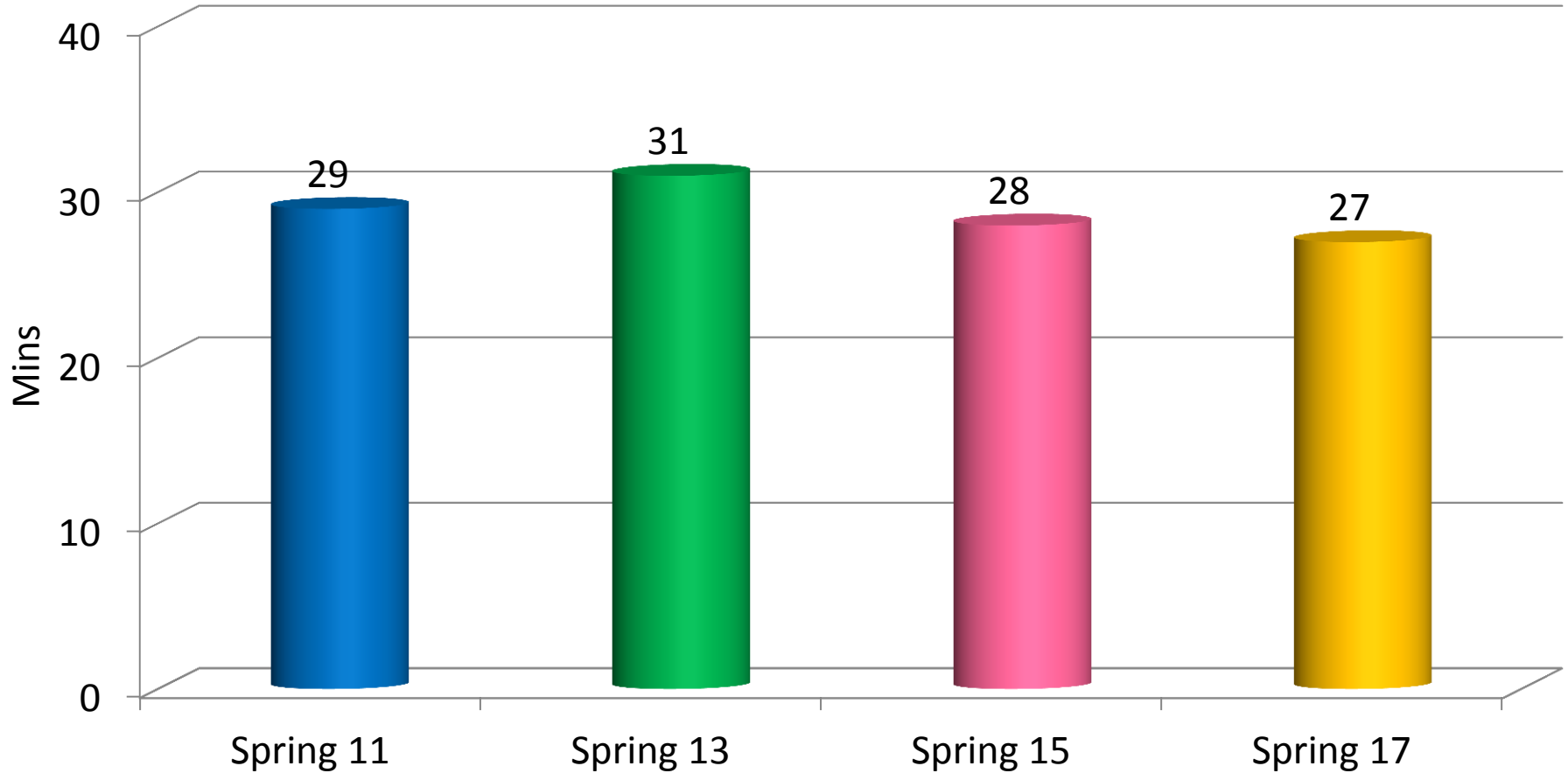
Travel Time

How long did it take you to travel here today?

(n = all respondents)



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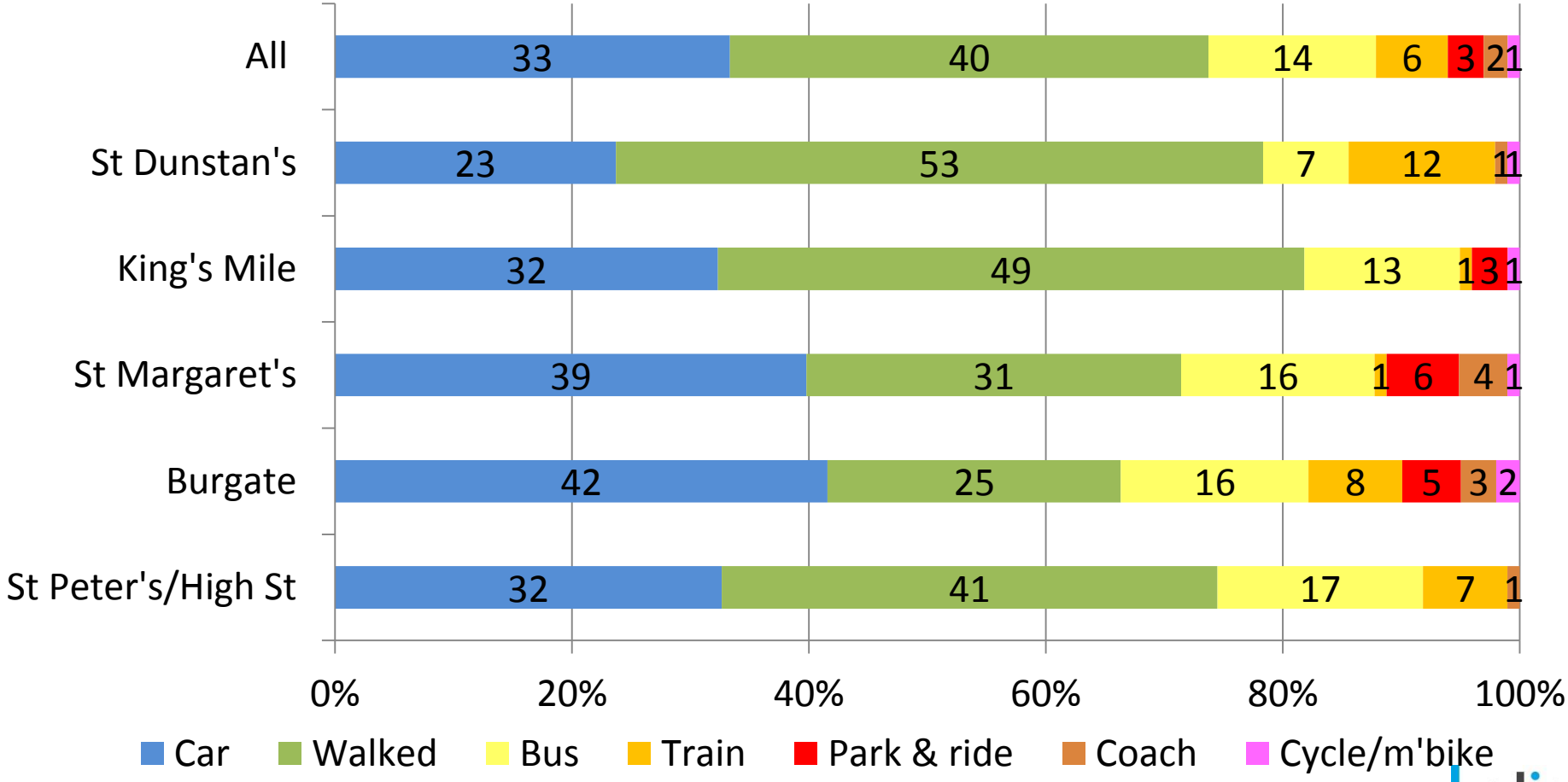
Travel Mode (Spring 17)

How did you travel here today?

(n = all respondents)



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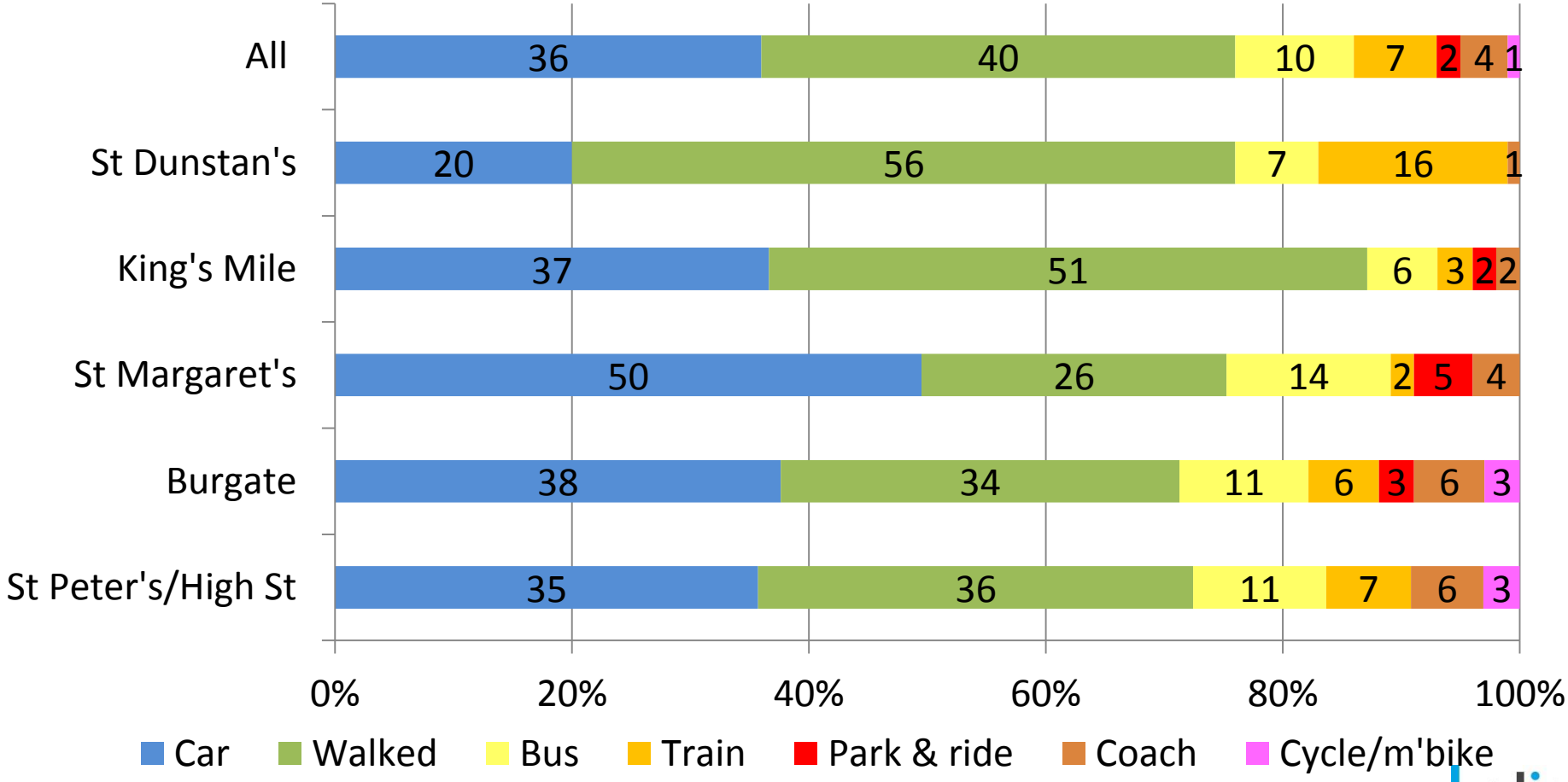
Travel Mode (Spring 15)

How did you travel here today?

(n = all respondents)



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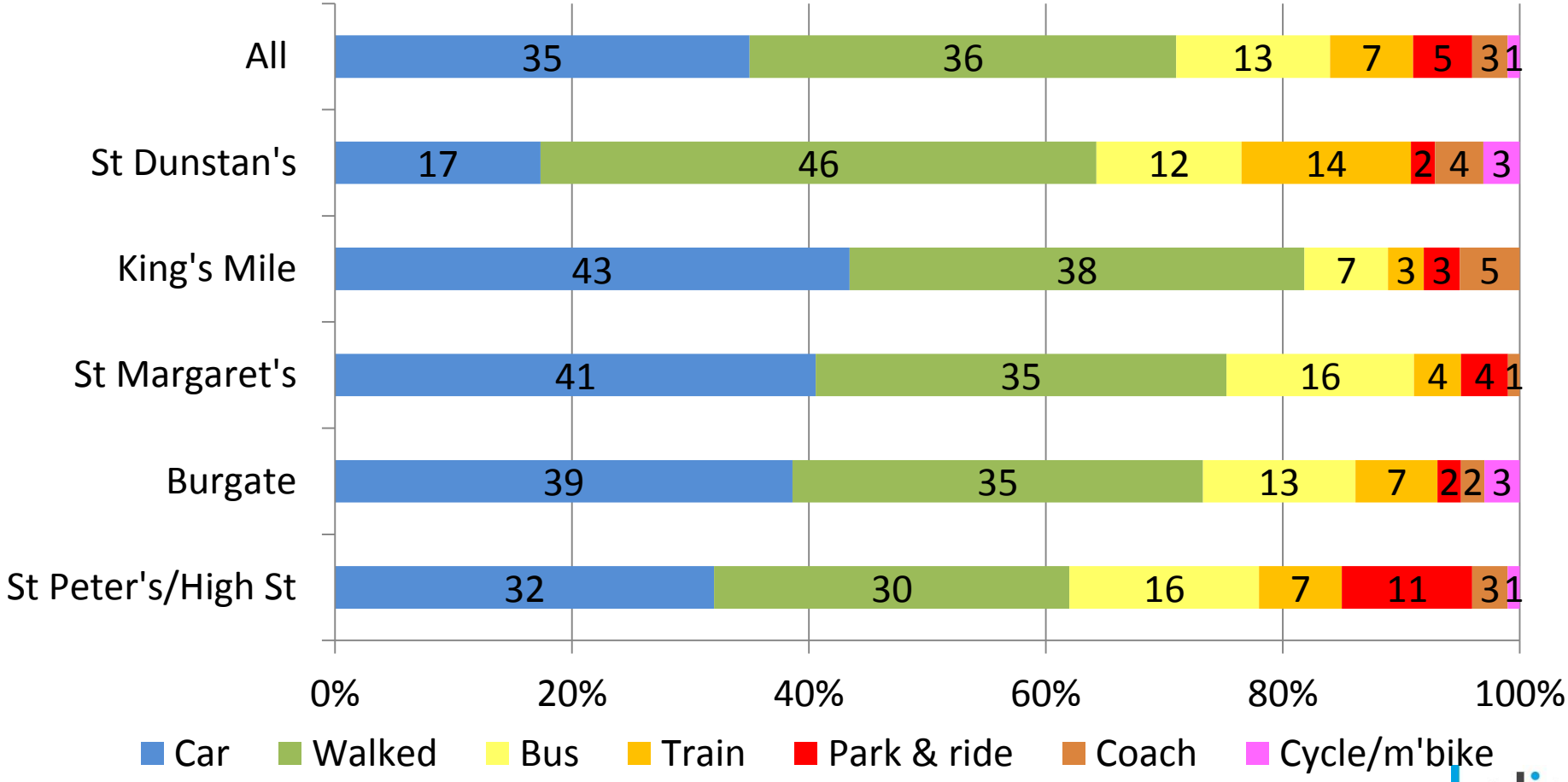
Travel Mode (Spring 13)

How did you travel here today?

(n = all respondents)



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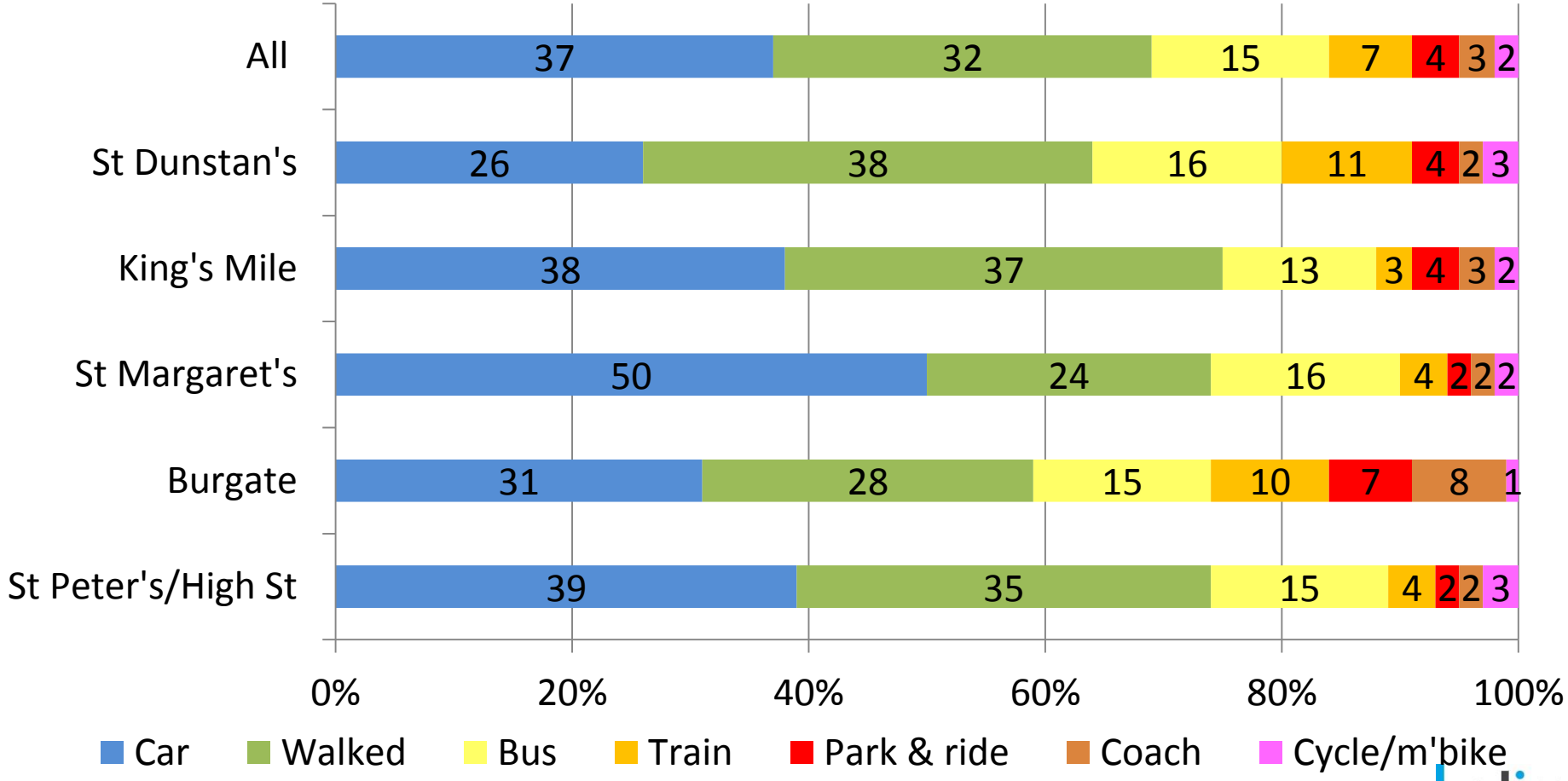
Travel Mode (Spring 11)

How did you travel here today?

(n = all respondents)



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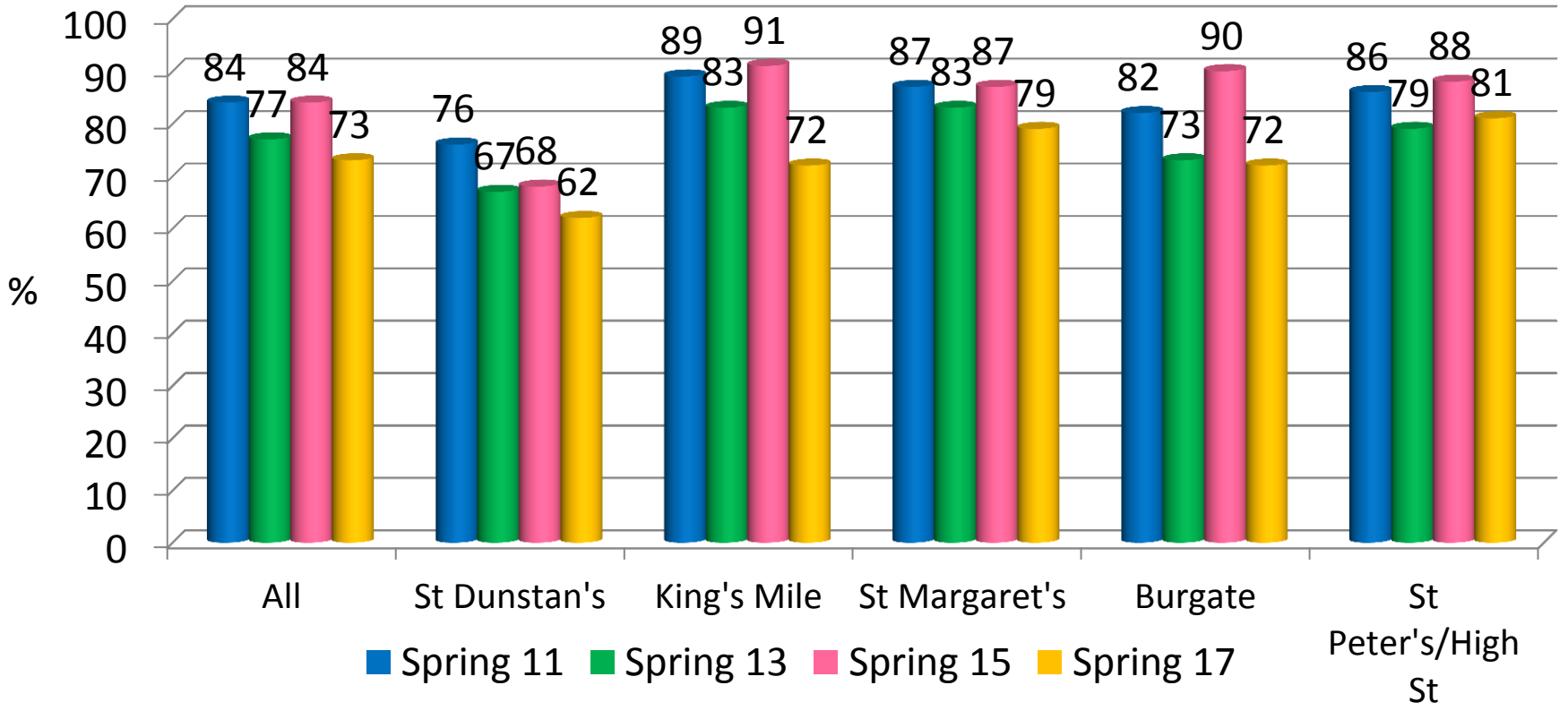
Shopping Today

Proportion shopping in Canterbury city centre today

(n = all respondents)



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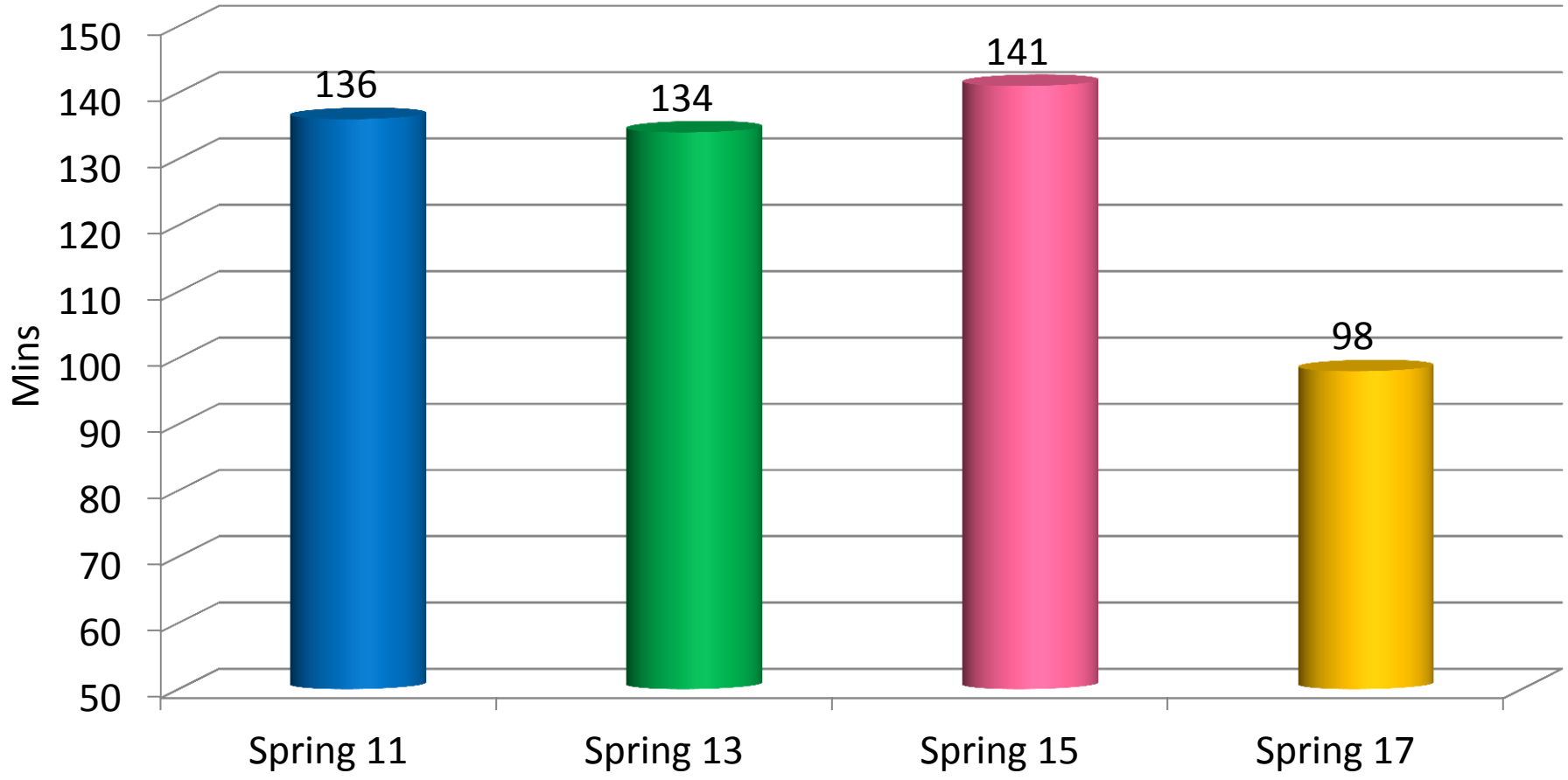
Dwell Time

How long will you stay in total shopping in Canterbury city centre today?

(n = those shopping in Canterbury today)



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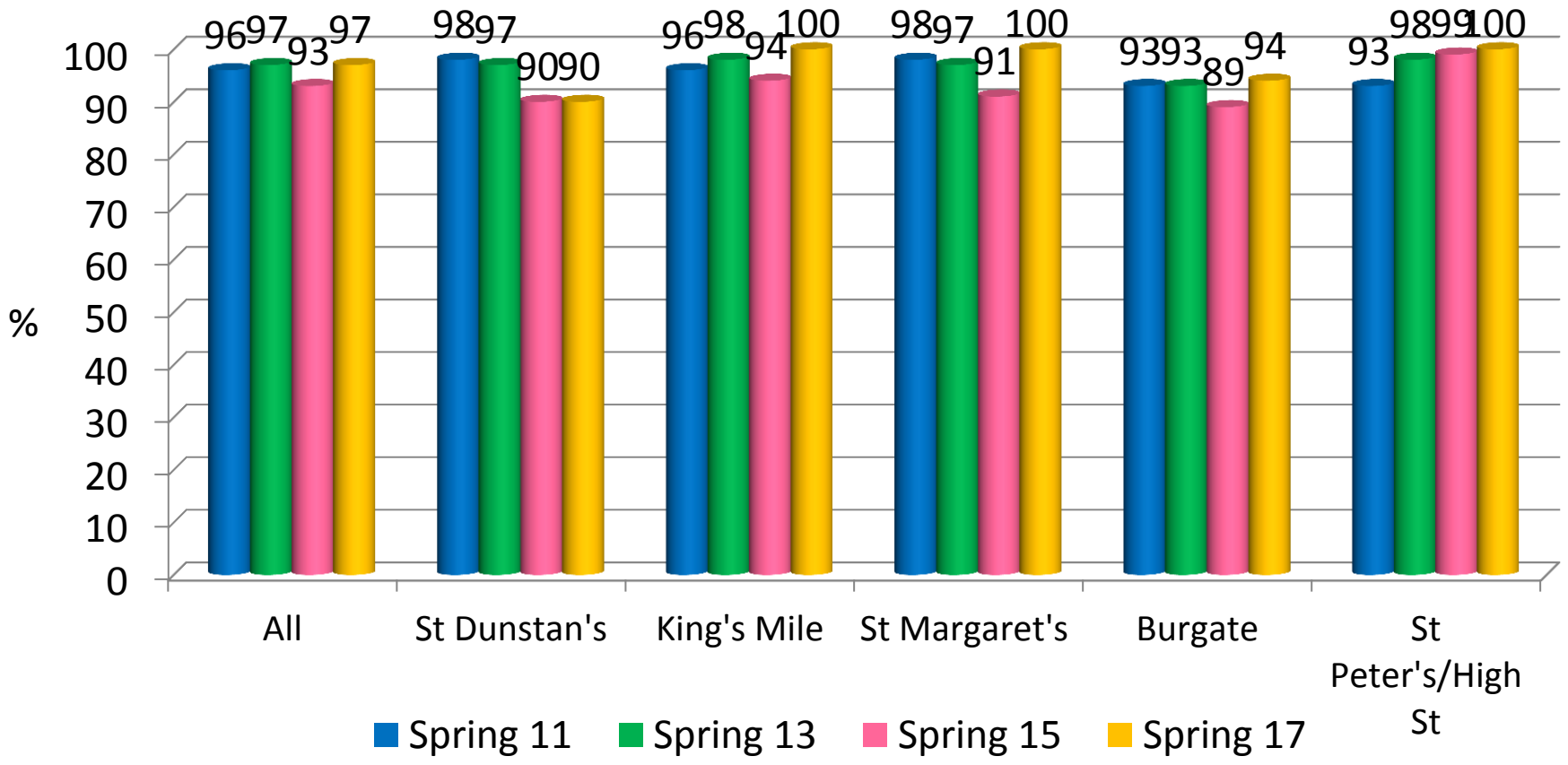
Canterbury Non-food Shoppers

Proportion who ever shop in Canterbury city centre for non-foods

(n = all respondents)



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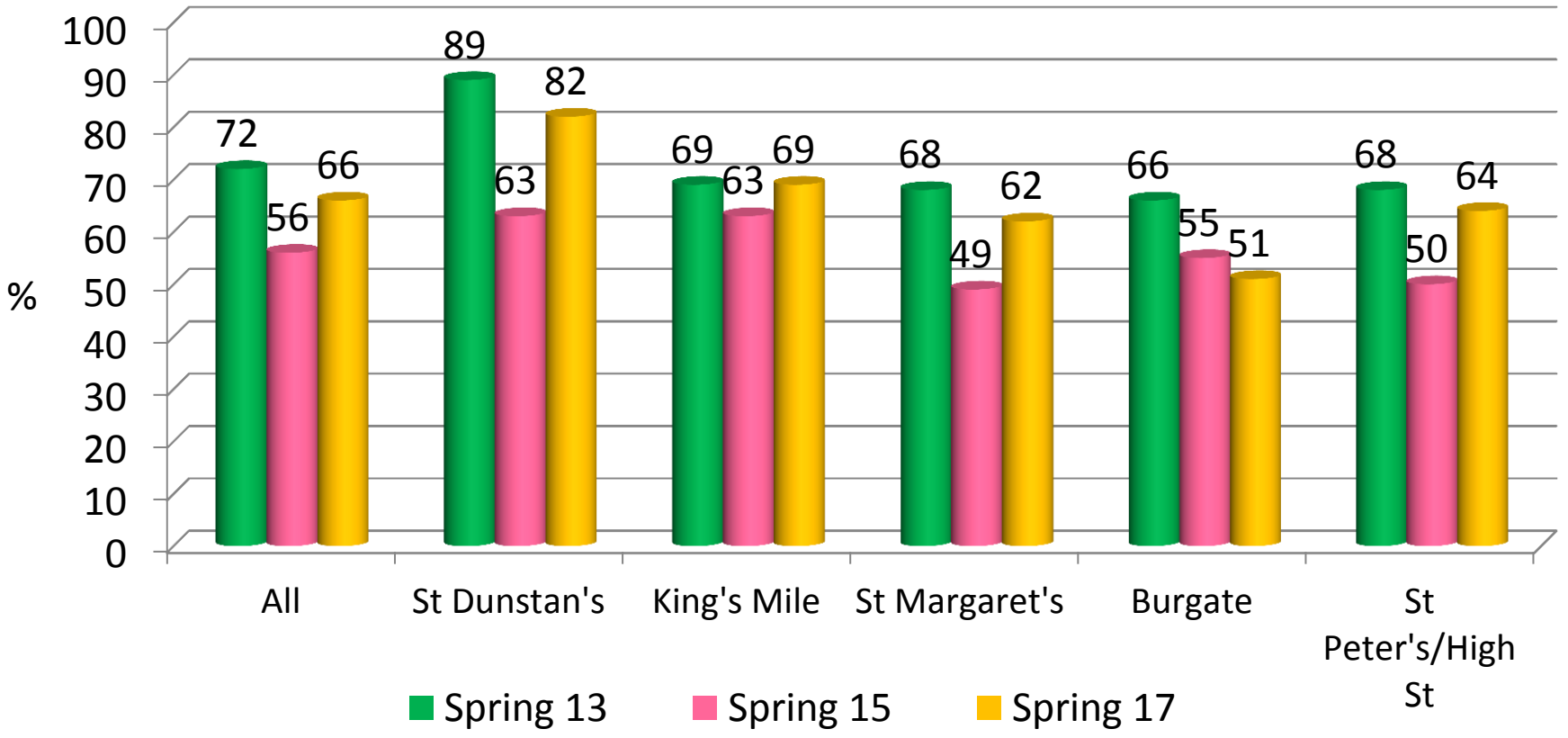
Canterbury Grocery Shoppers

Proportion who ever shop in Canterbury city centre for groceries

(n = all respondents)



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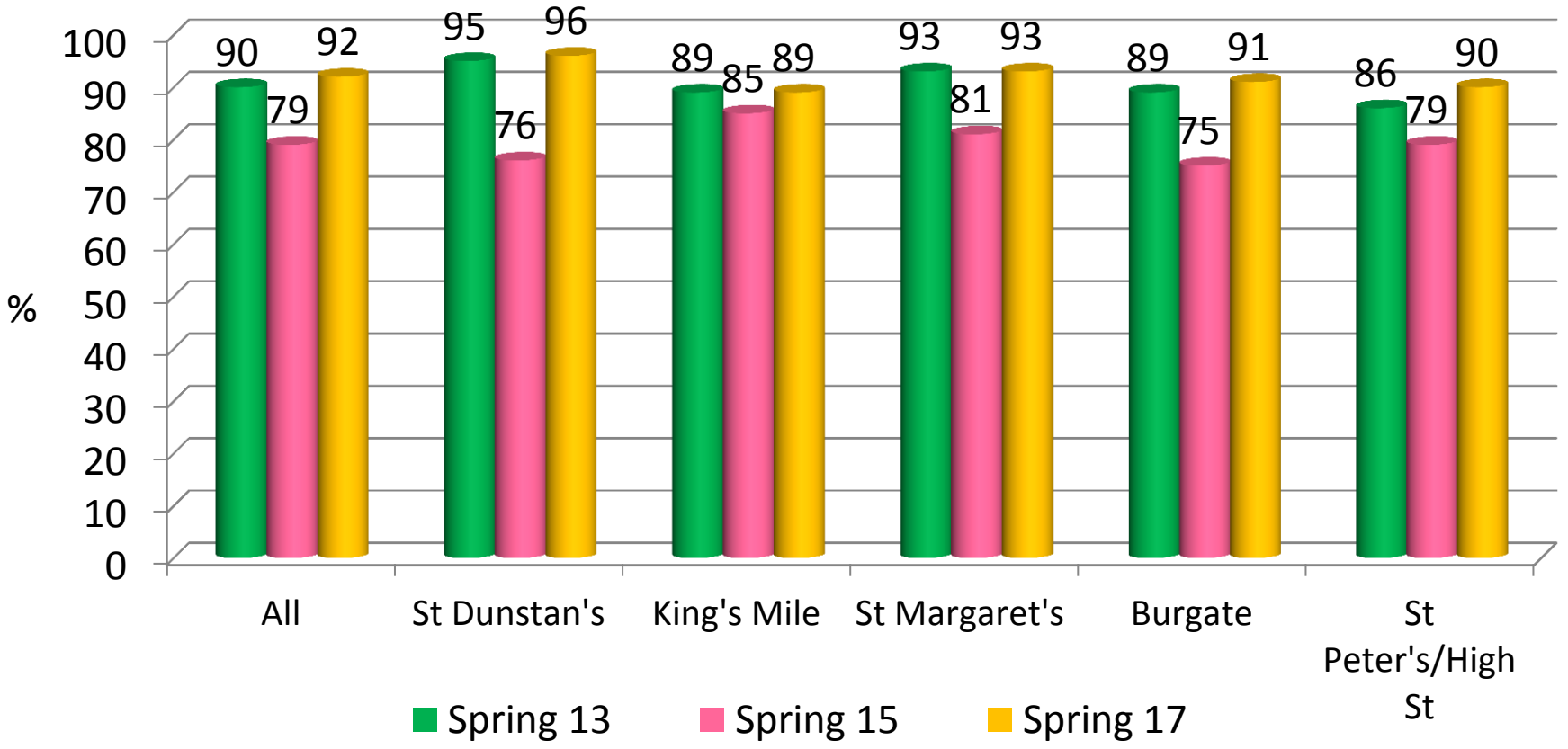
Canterbury Entertainment Visitors

Proportion who ever visit Canterbury city centre for entertainment

(n = all respondents)



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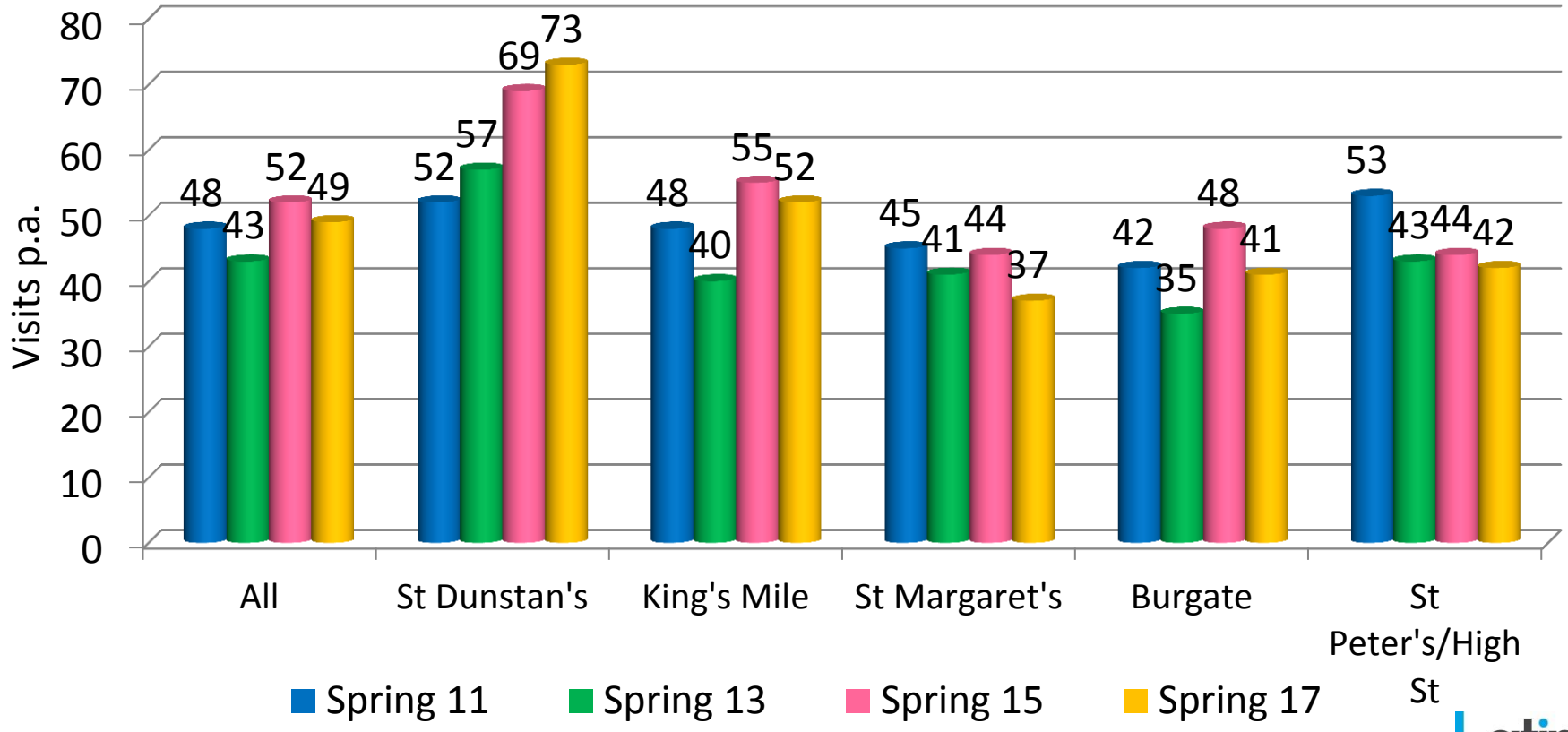
Visit Frequency: Non-foods

How often do you visit Canterbury for non-food shopping ?

(n = those who ever shop in Canterbury for non-foods)



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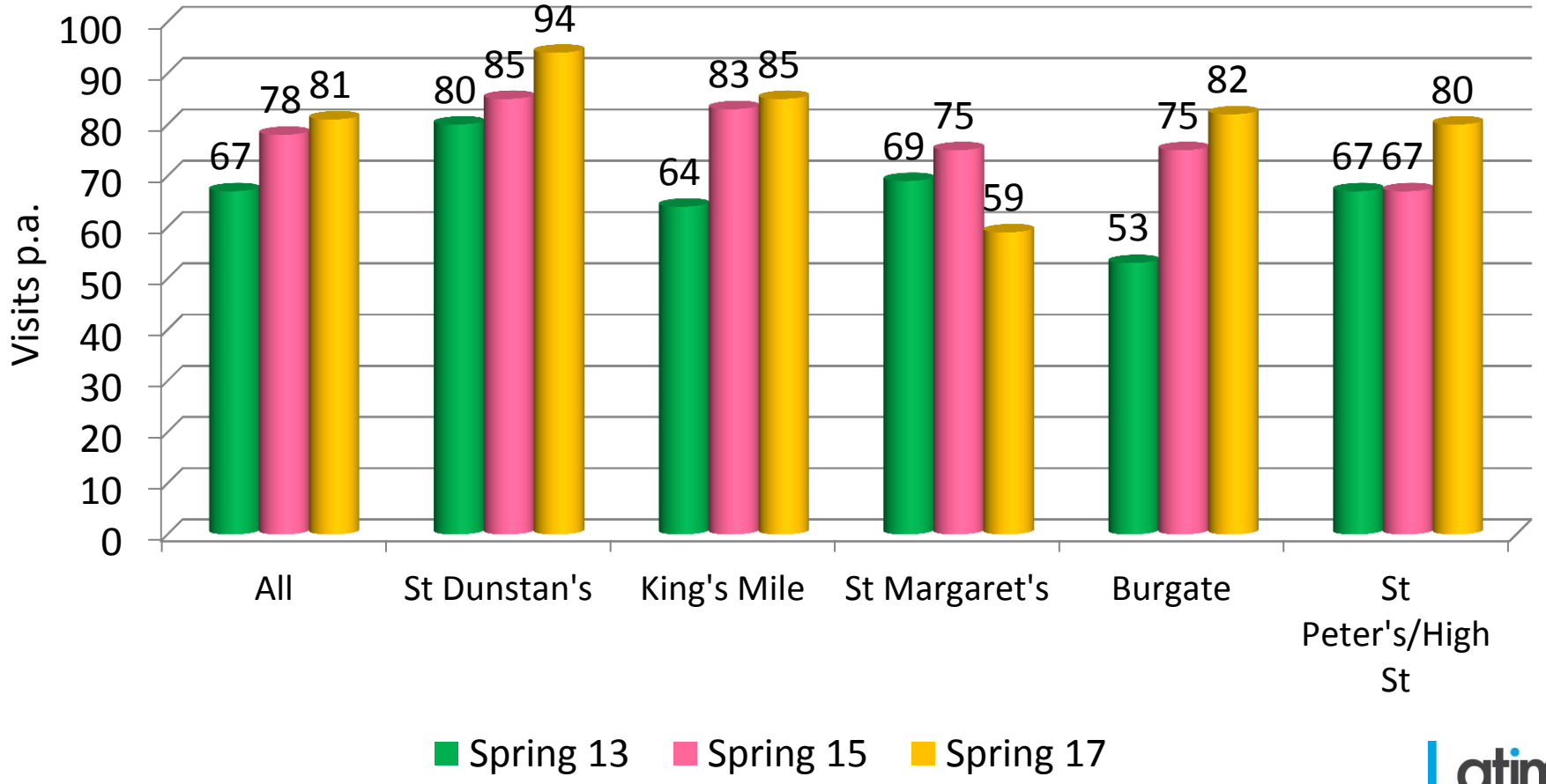
Visit Frequency: Grocery

How often do you visit Canterbury for grocery shopping ?

(n = those who ever shop in Canterbury for groceries)



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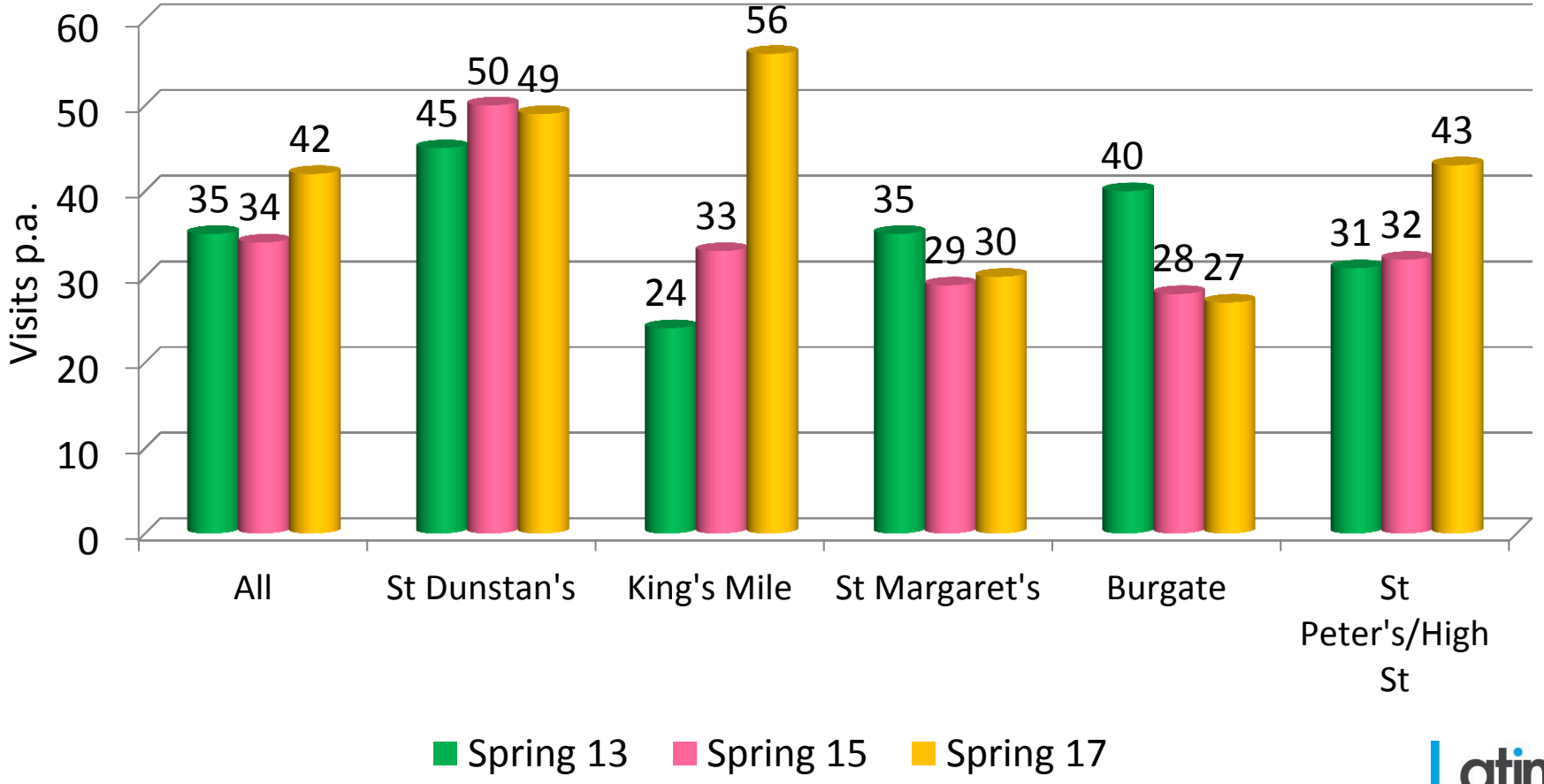
Visit Frequency: Entertainment

How often do you visit Canterbury for entertainment?

(n = those who ever visit Canterbury for entertainment purposes)



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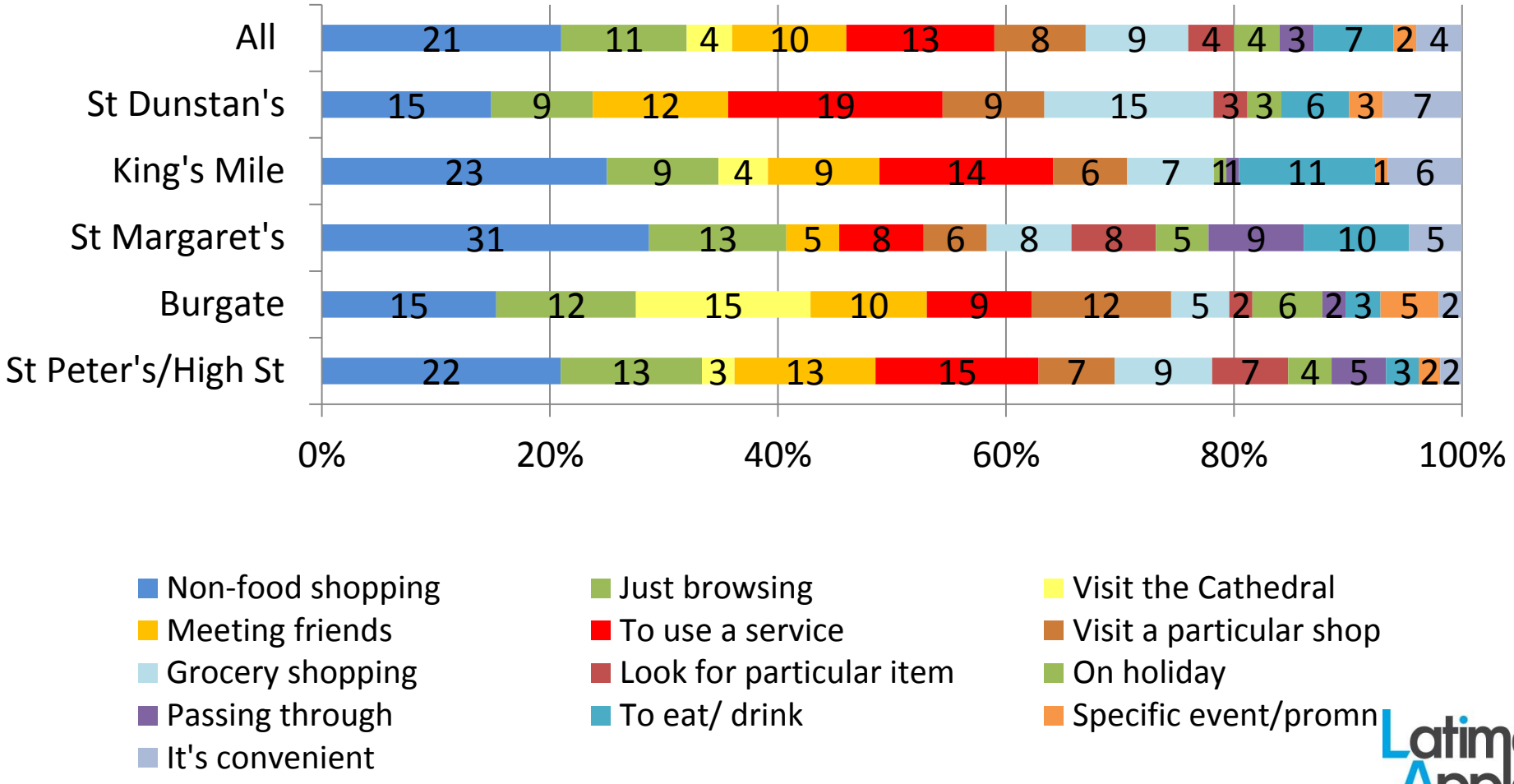
Main Reason for Visit (Spring 17)

What was your main reason for being here today?

(n = all respondents)



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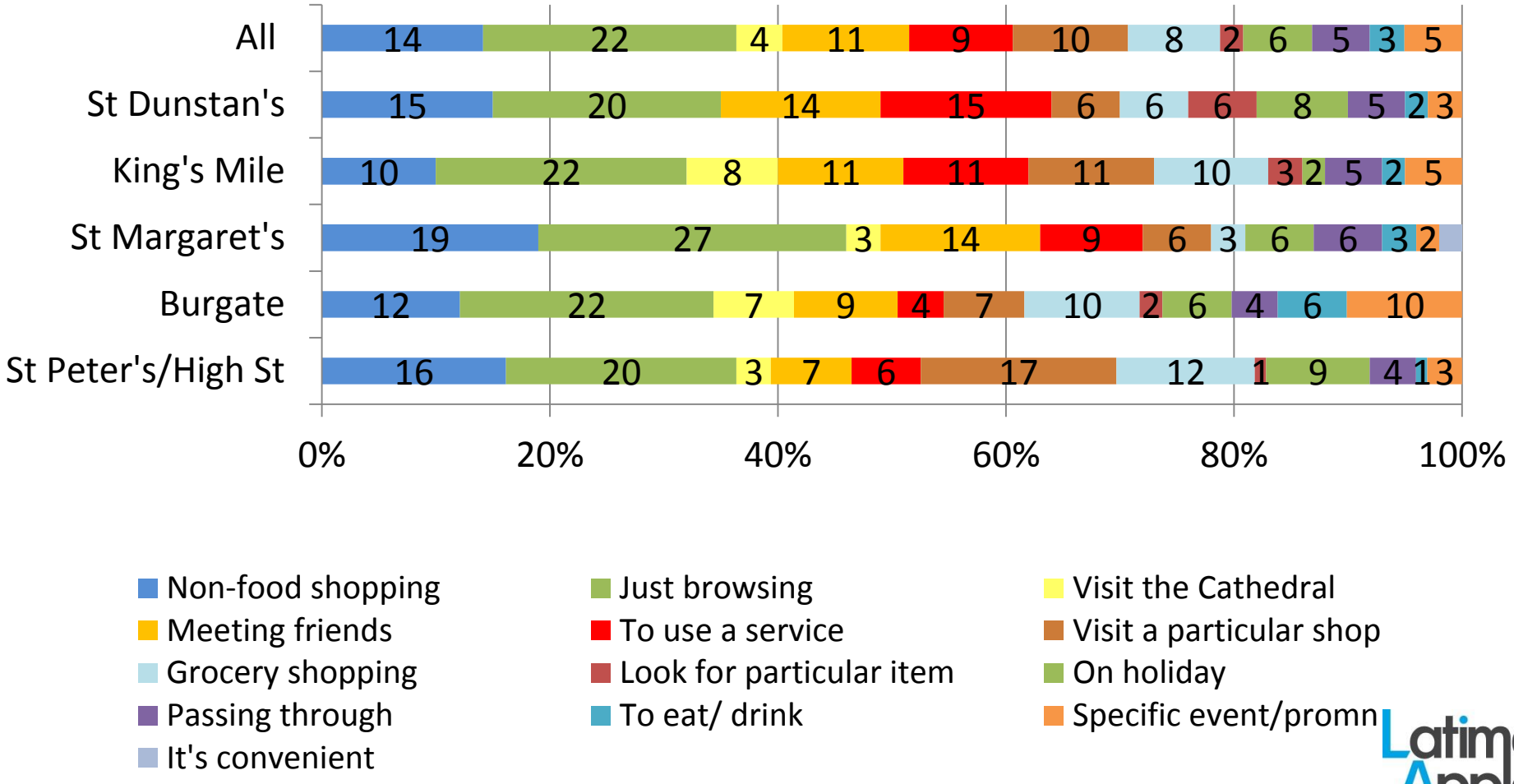
Main Reason for Visit (Spring 15)

What was your main reason for being here today?

(n = all respondents)



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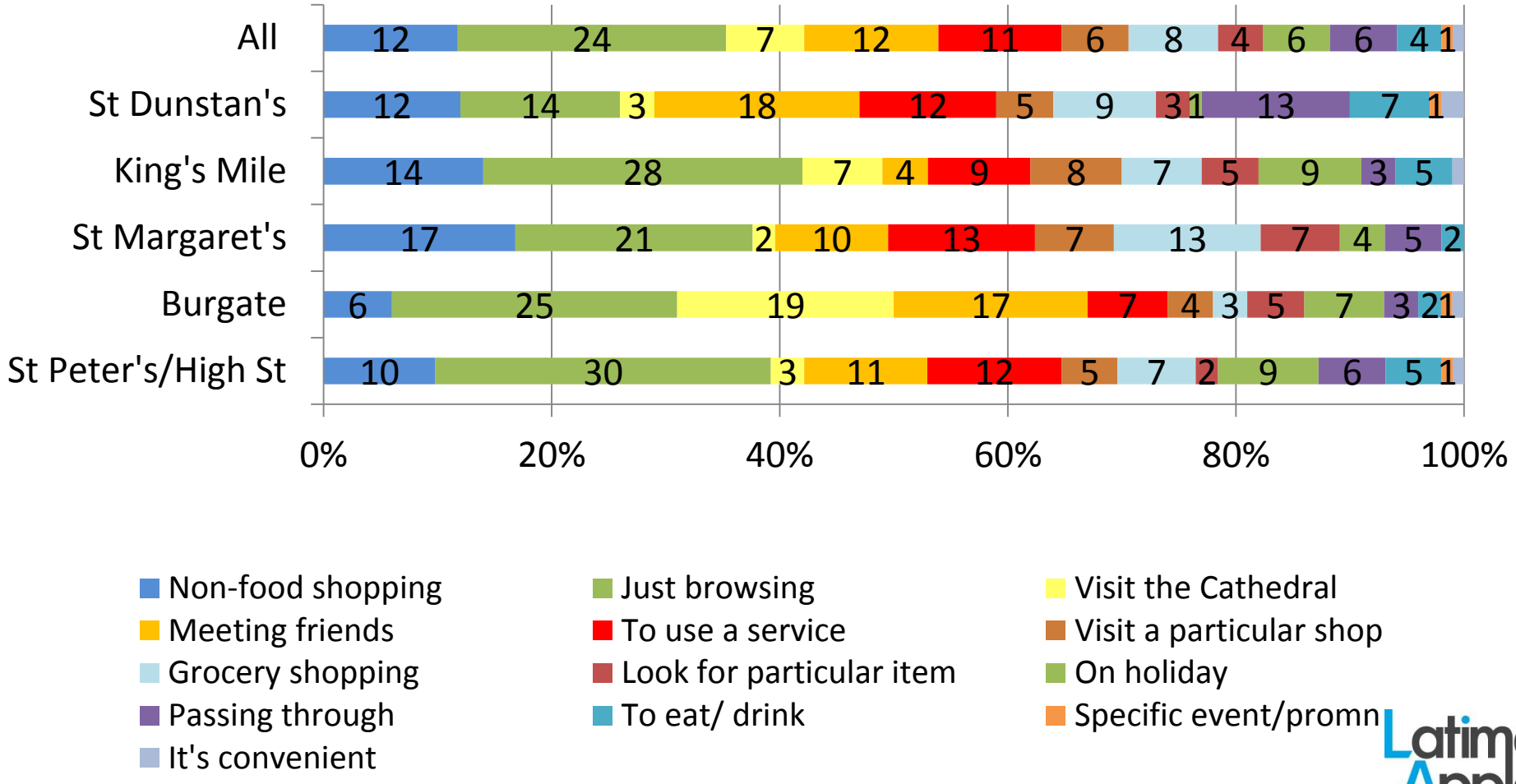
Main Reason for Visit (Spring 13)

What was your main reason for being here today?

(n = all respondents)



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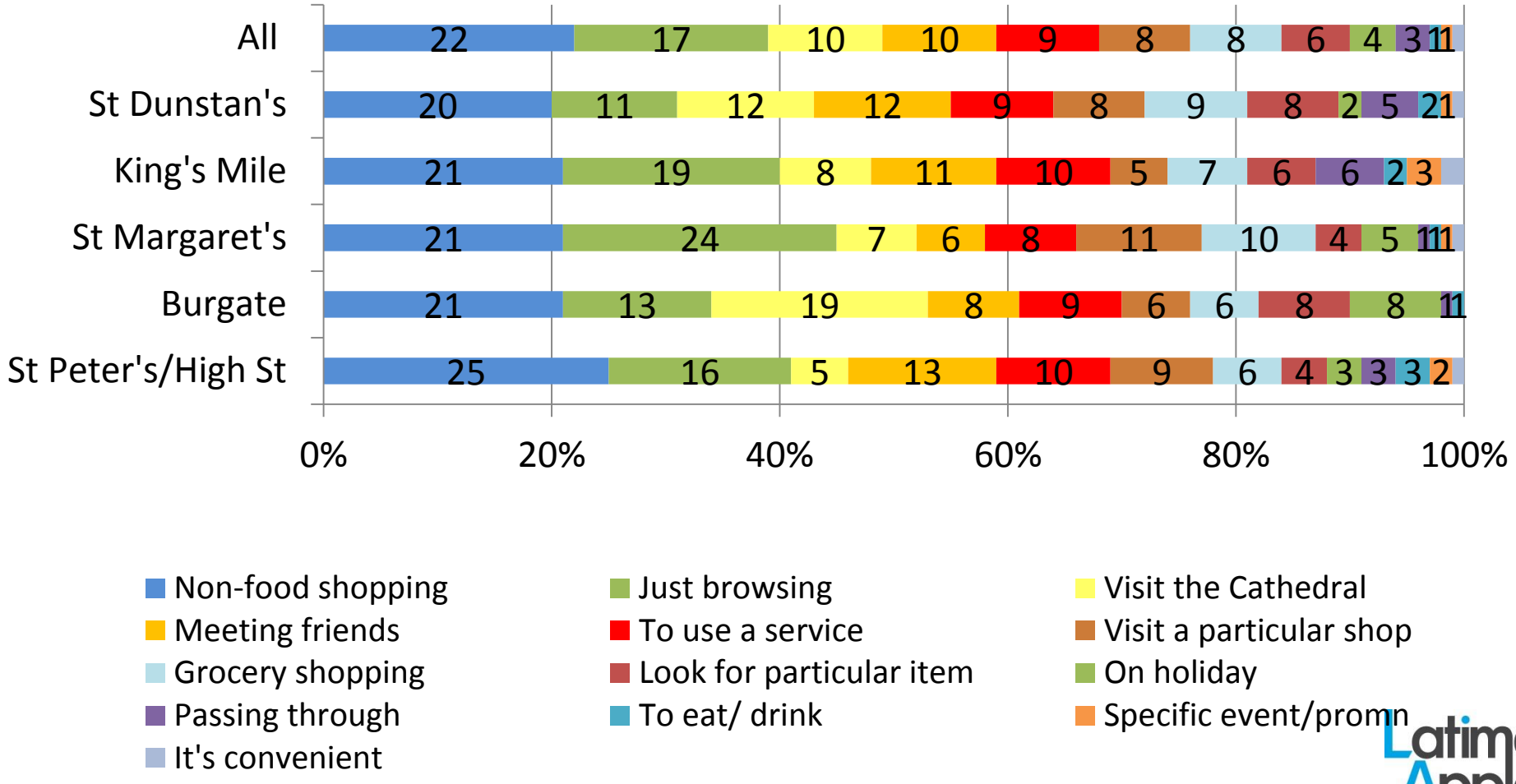
Main Reason for Visit (Spring 11)

What was your main reason for being here today?

(n = all respondents)



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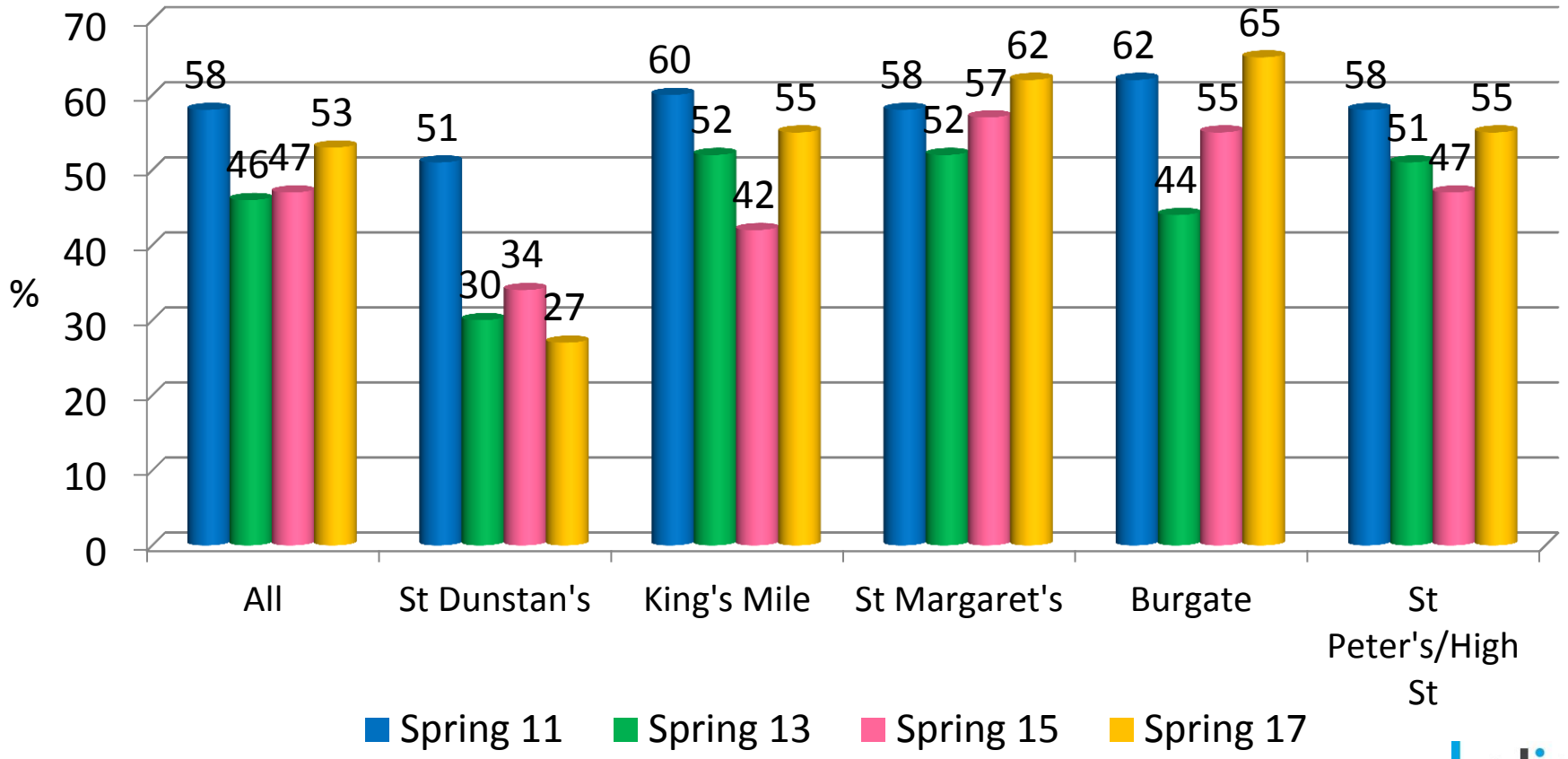
Non-food Conversion

Proportion making non-food purchases in Canterbury city centre today?

(n = all respondents)



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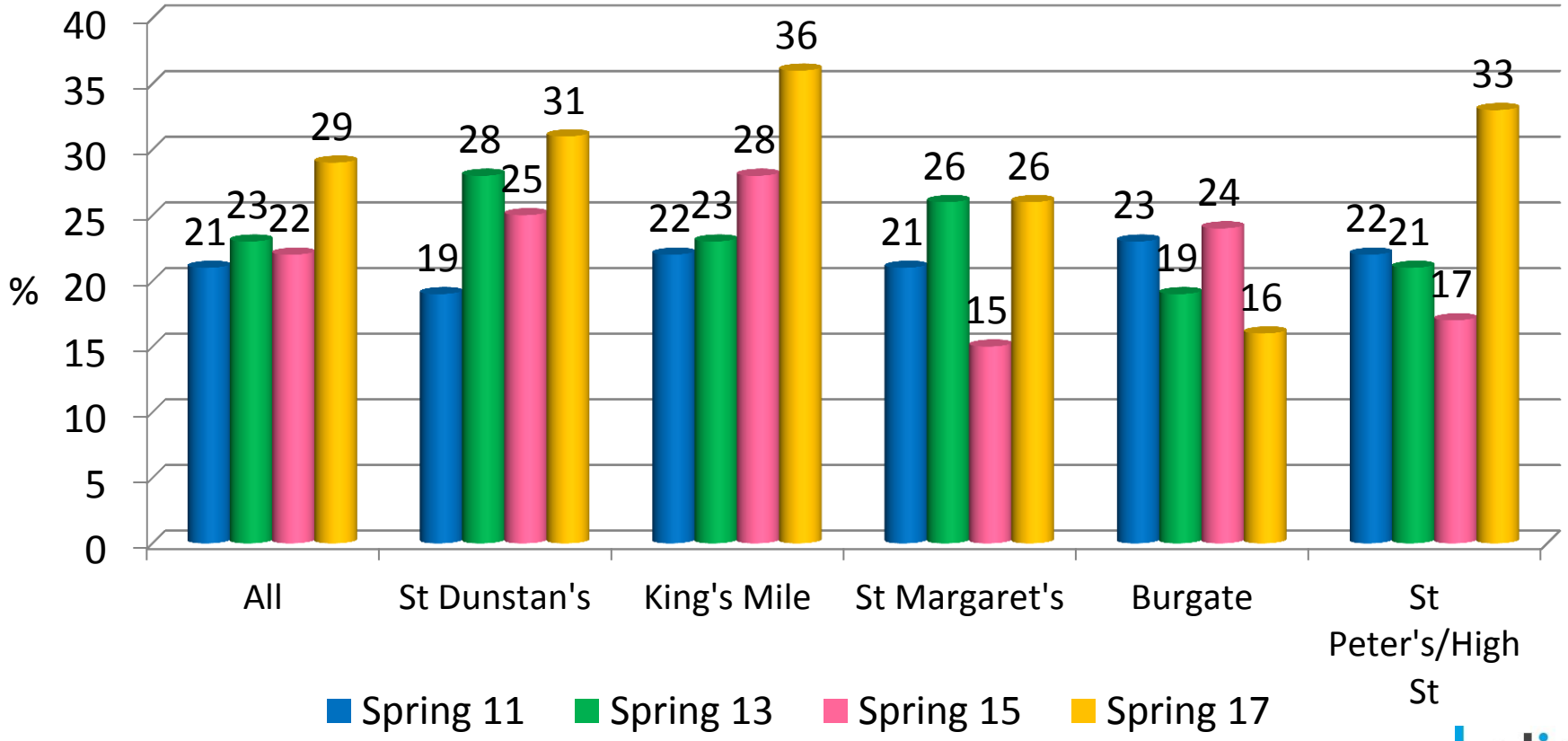
Grocery Conversion

Proportion making grocery purchases in Canterbury city centre today?

(n = all respondents)



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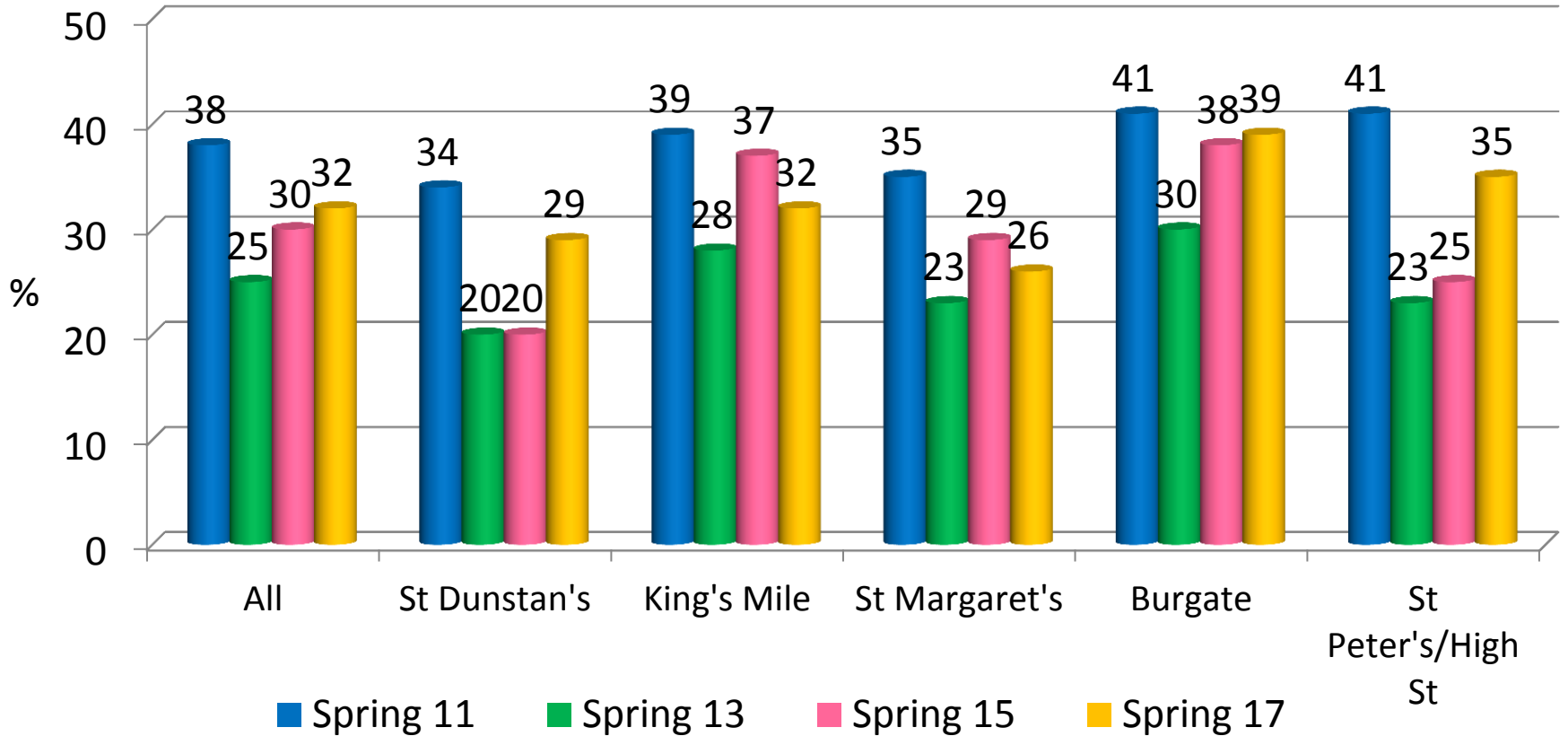
Entertainment Conversion

Proportion making entertainment purchases in Canterbury city centre today?

(n = all respondents)



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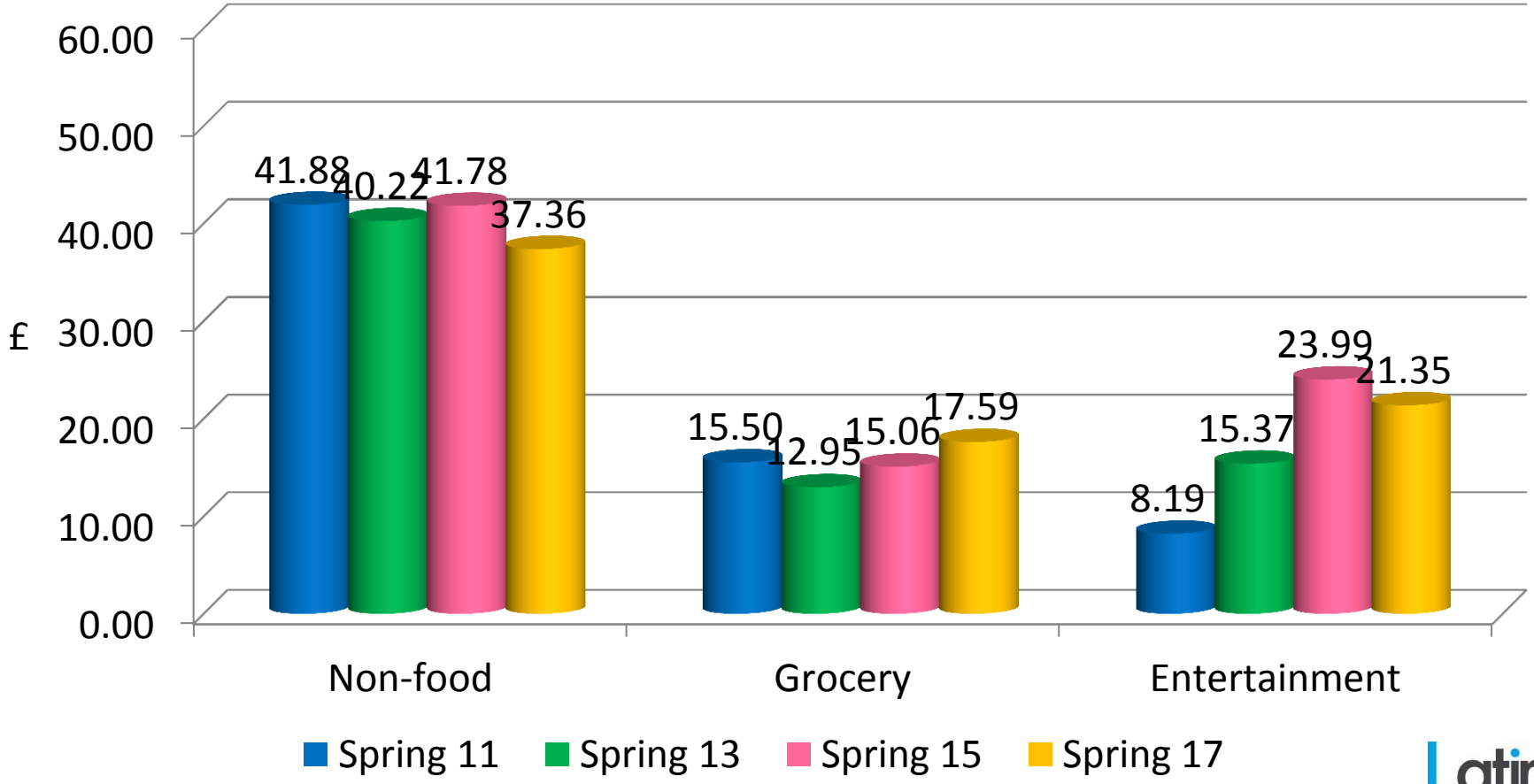
Average Party Spend

How much to the nearest £ have you spent as a party today?

(n = those who have spent on each category)



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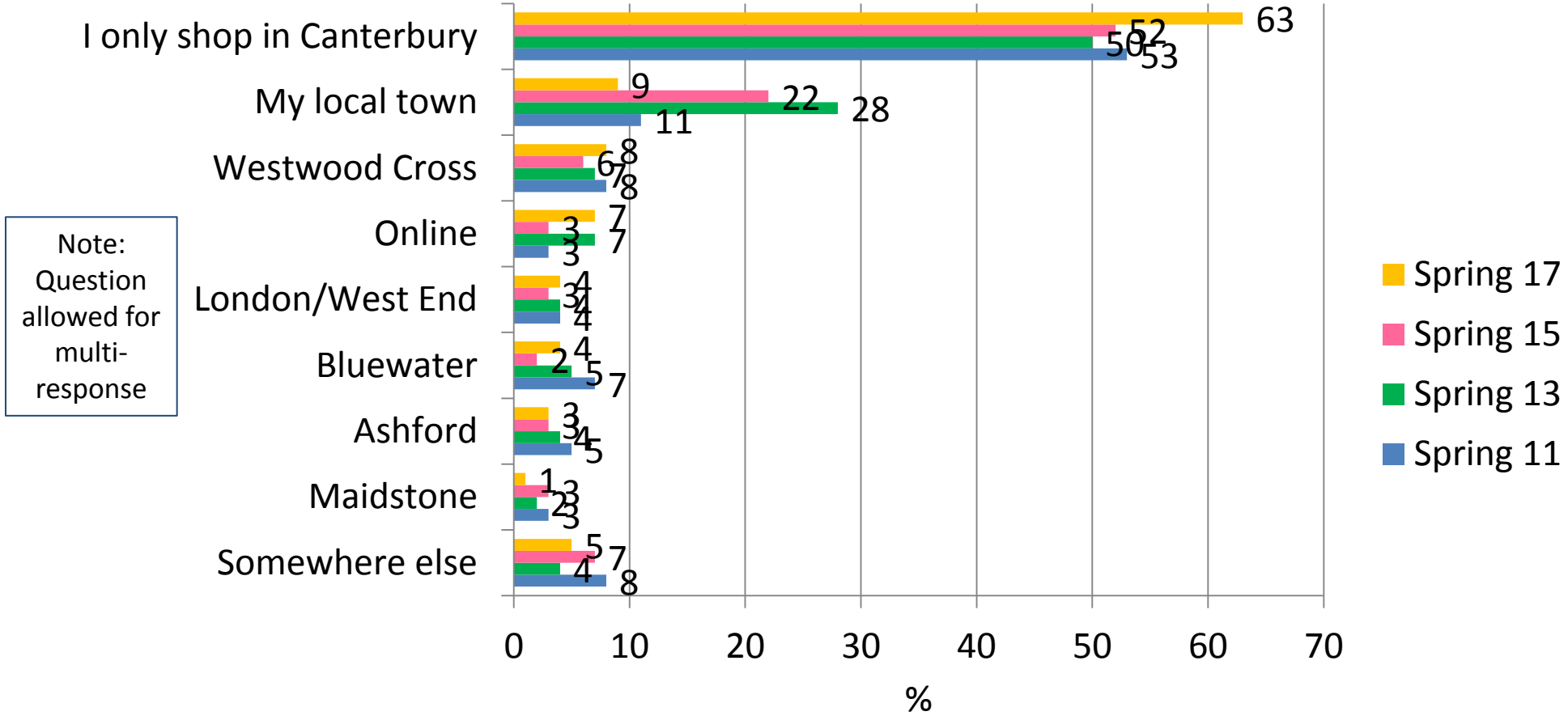
Alternative Purchase Location

Where would you have made your purchase if you hadn't come here?

(n = those who made a non-food or grocery purchase today)



Note: Question allowed for multi-response

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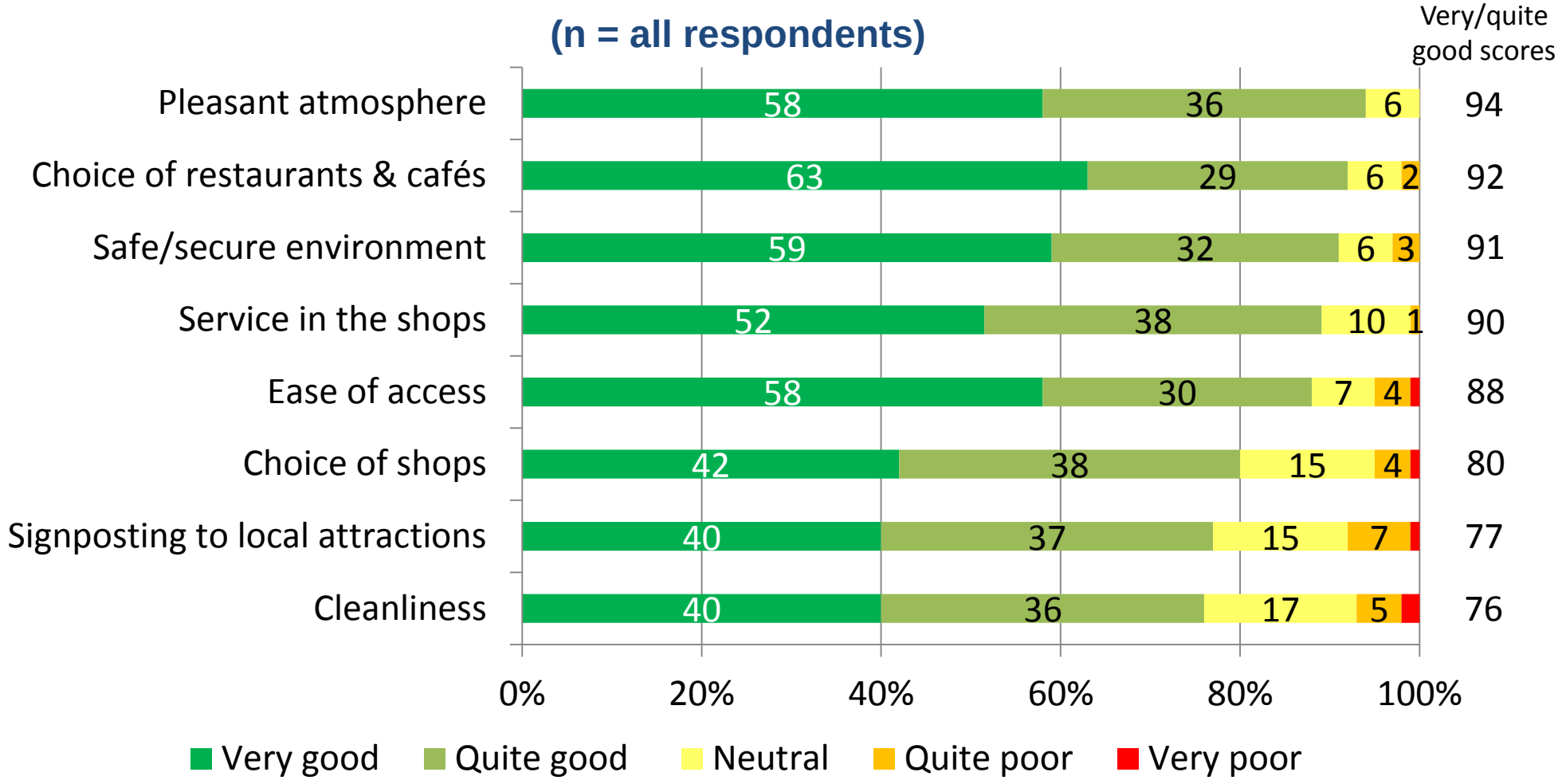
City centre Ratings (Spring 17)

How would you rate Canterbury city centre for each of the following?

(n = all respondents)



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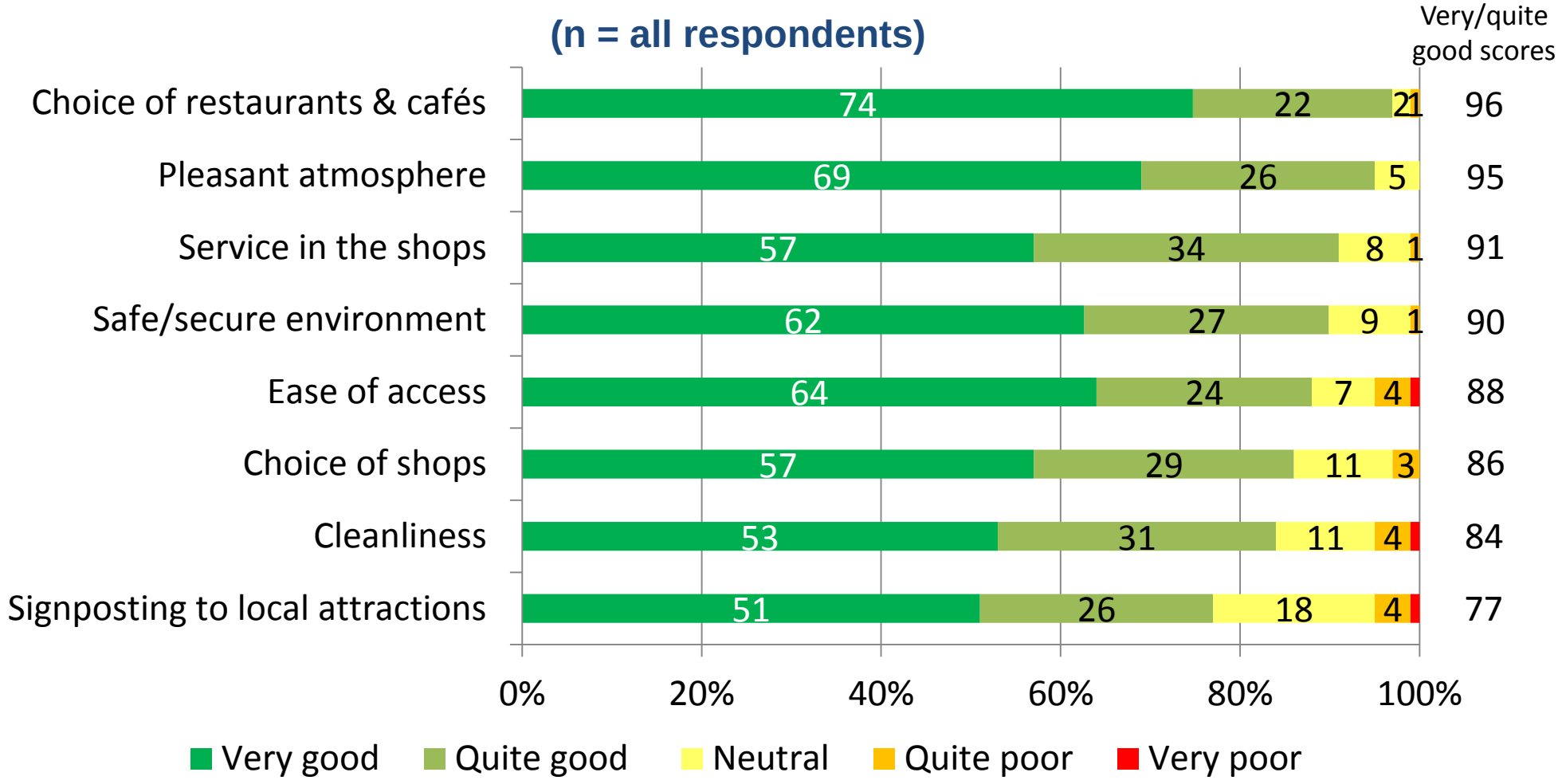
City centre Ratings (Spring 15)

How would you rate Canterbury city centre for each of the following?

(n = all respondents)



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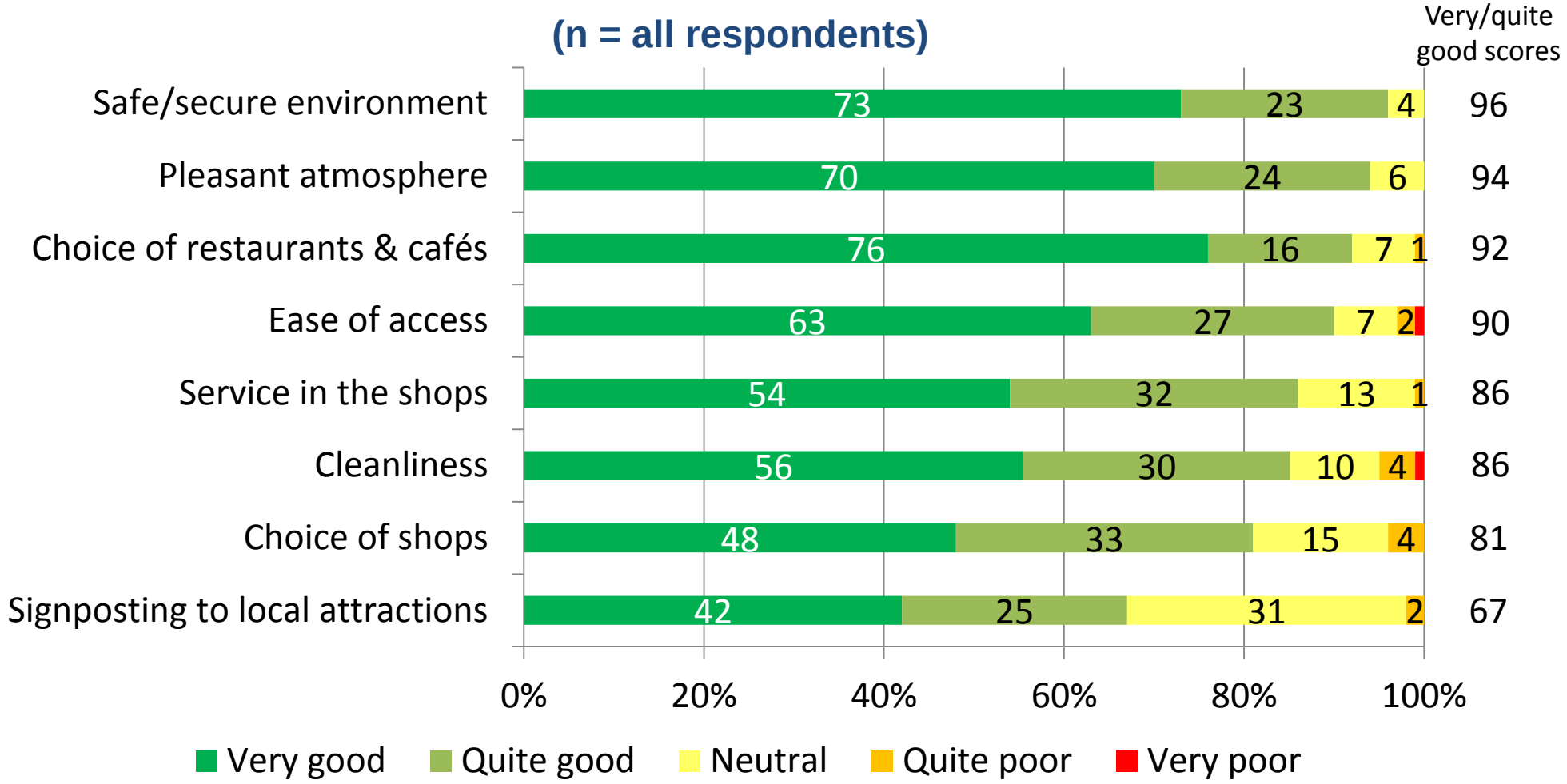
City centre Ratings (Spring 13)

How would you rate Canterbury city centre for each of the following?

(n = all respondents)



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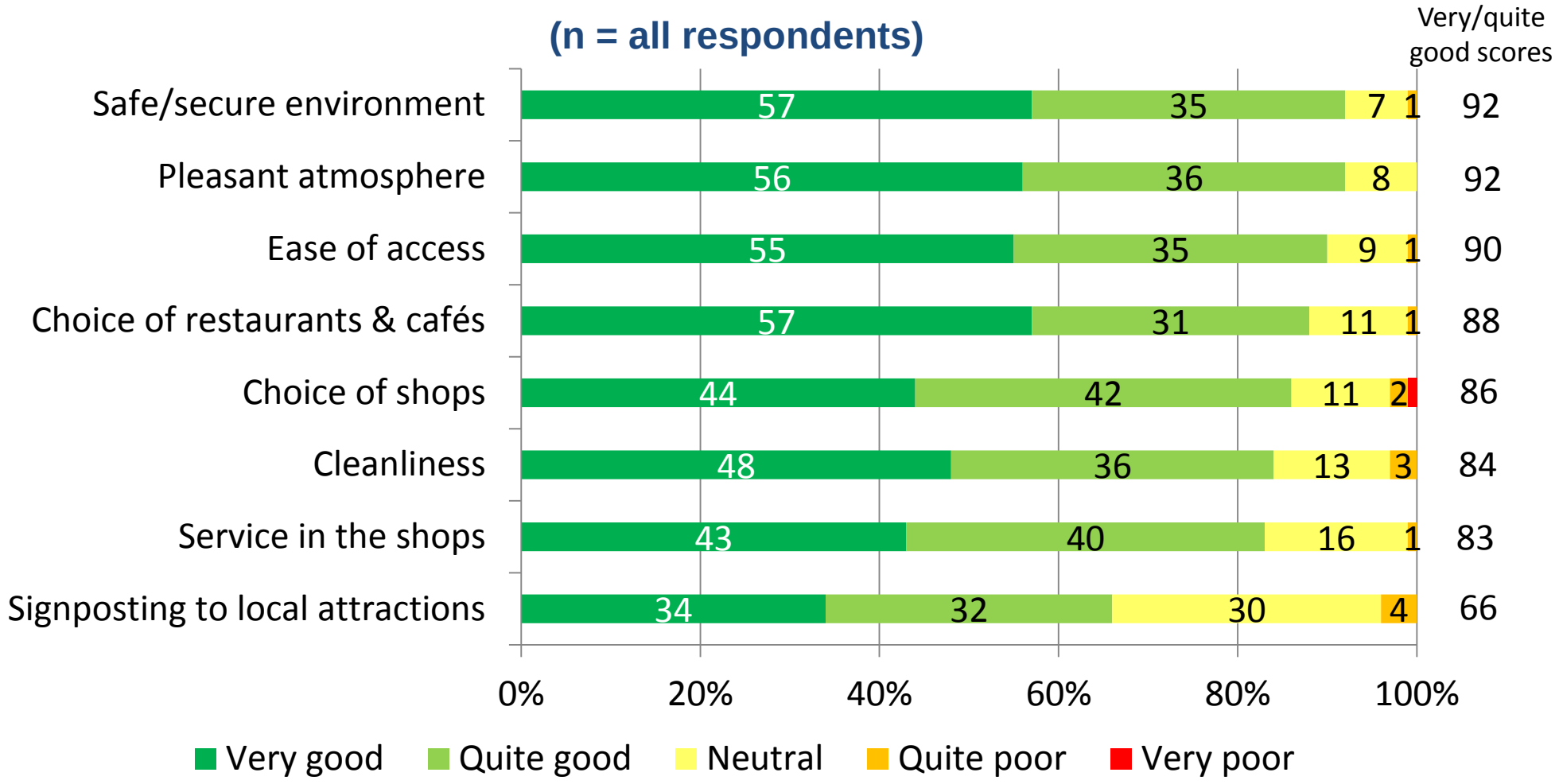
City centre Ratings (Spring 11)

How would you rate Canterbury city centre for each of the following?

(n = all respondents)



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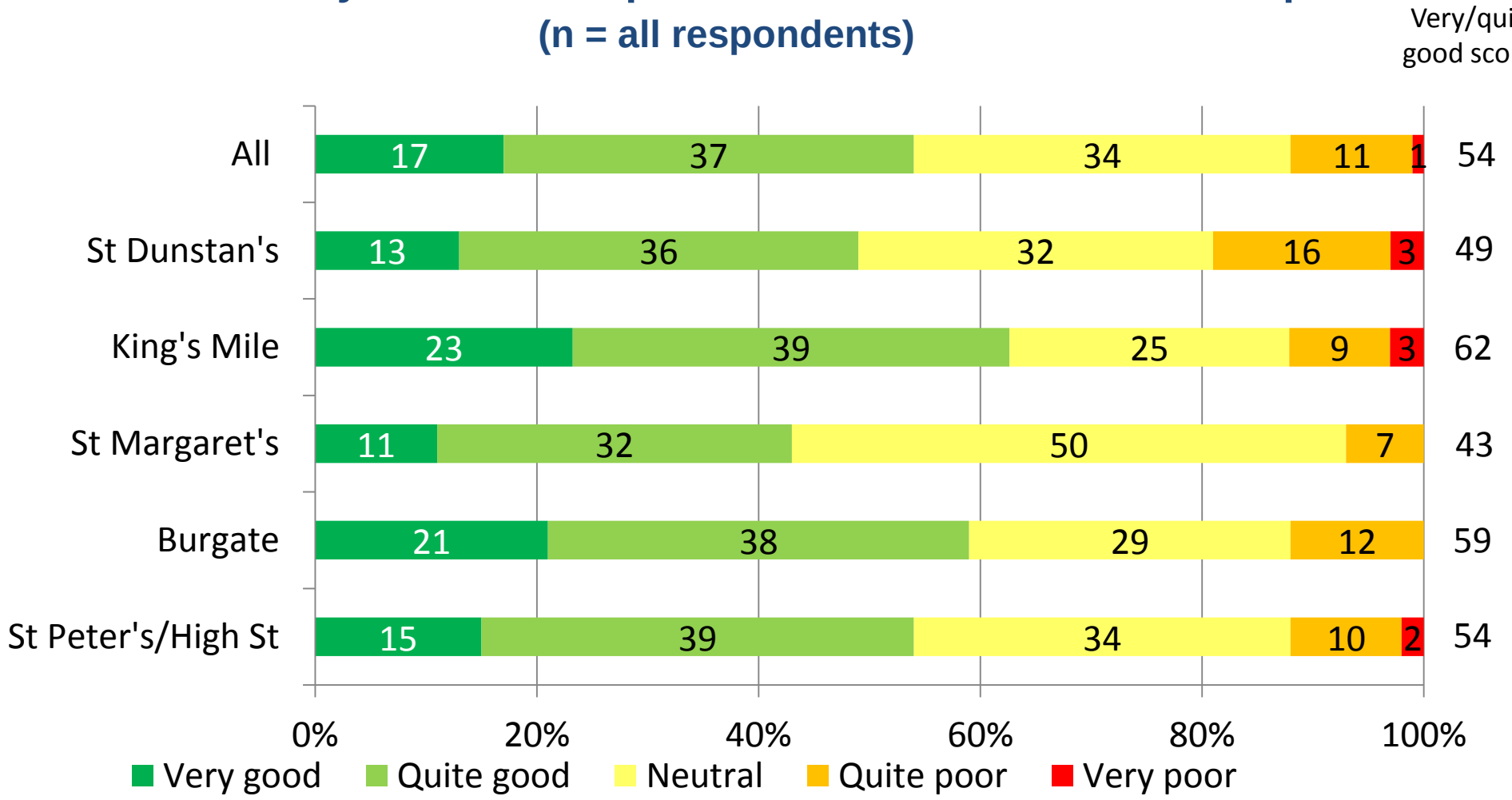
Area ratings: Choice of shops (Spring 17)

How would you rate this specific area for its Choice of shops?

(n = all respondents)



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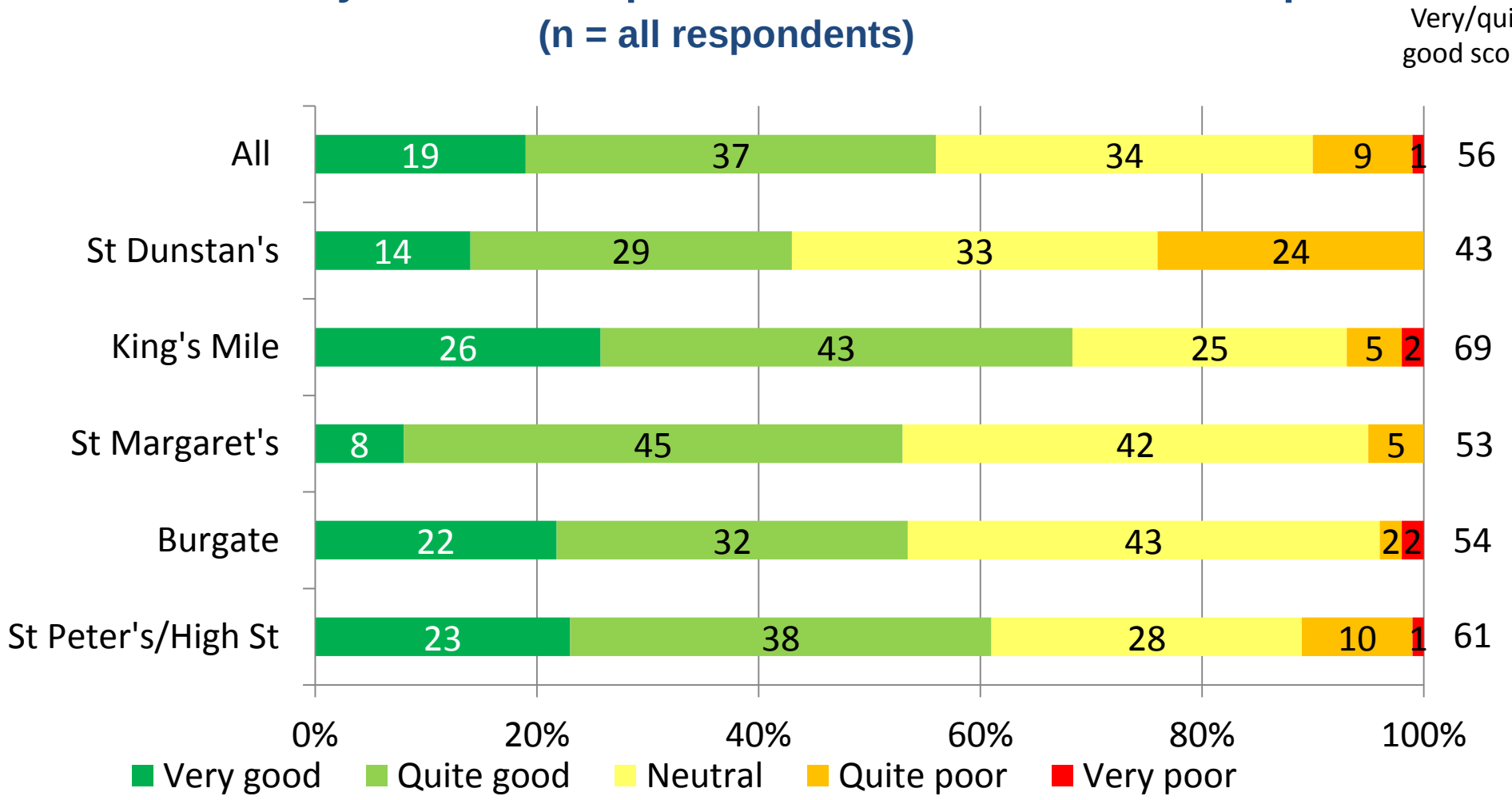
Area ratings: Choice of shops (Spring 15)

How would you rate this specific area for its Choice of shops?

(n = all respondents)



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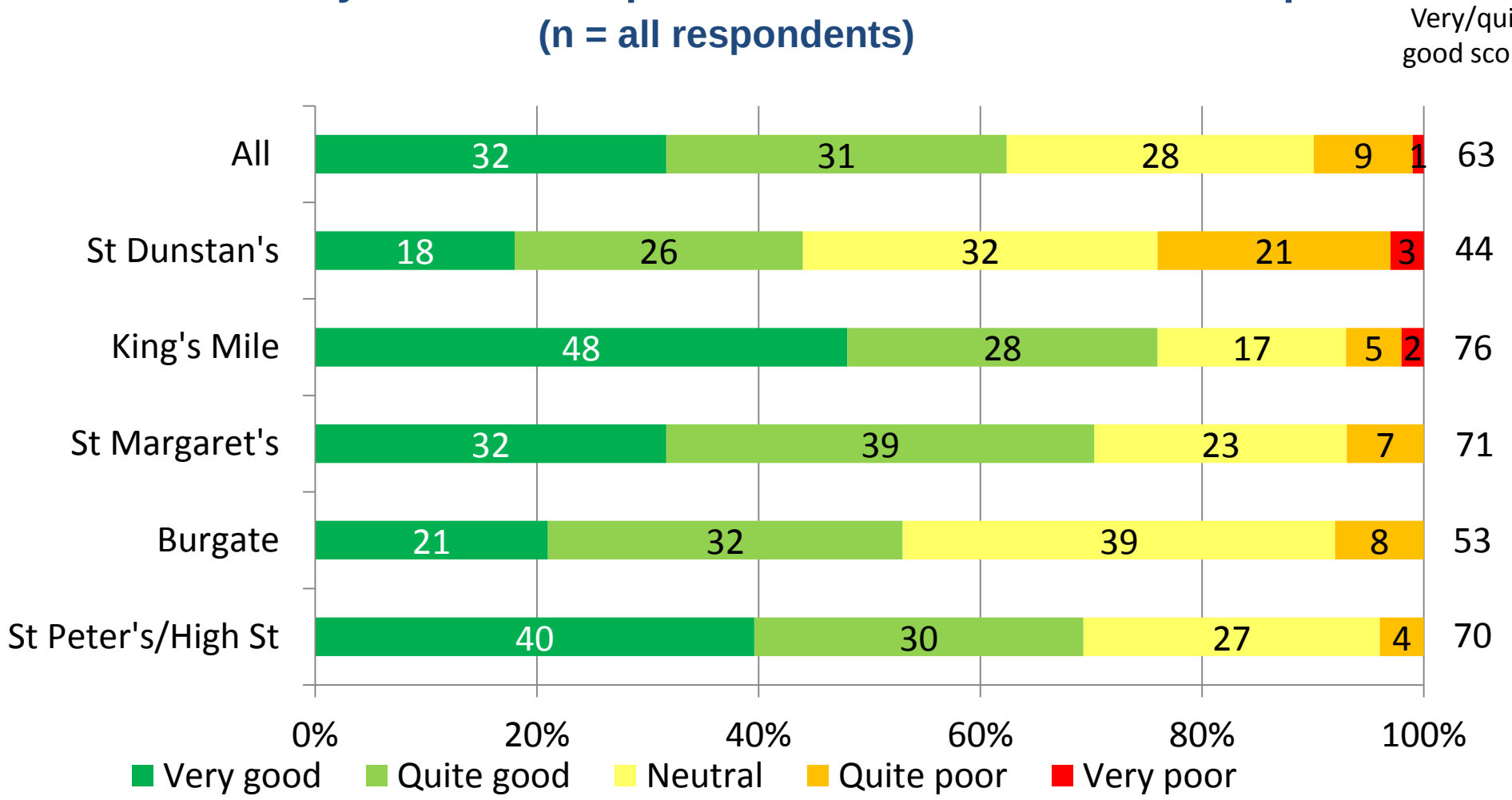
Area ratings: Choice of shops (Spring 13)

How would you rate this specific area for its Choice of shops?

(n = all respondents)



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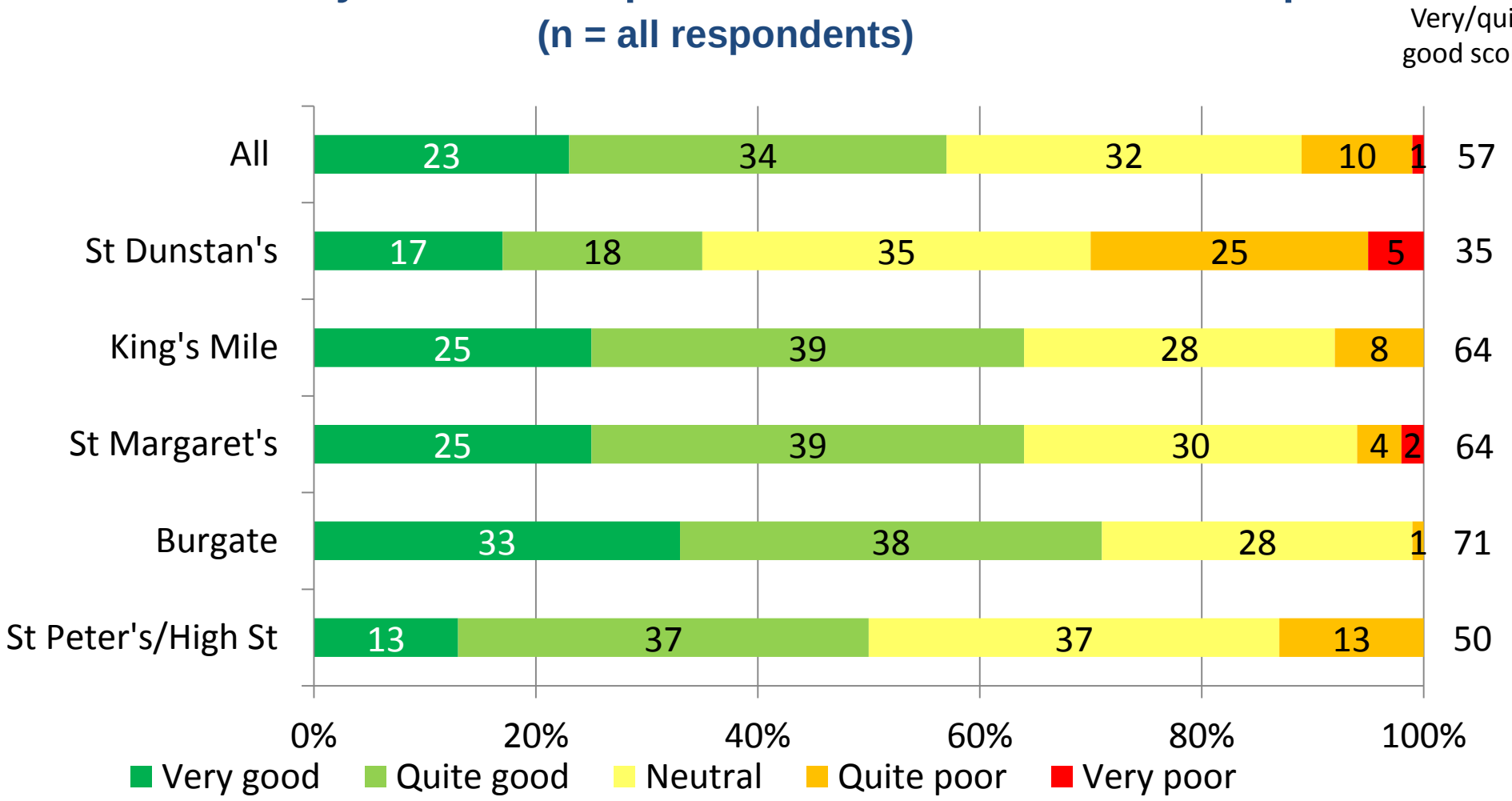
Area ratings: Choice of shops (Spring 11)

How would you rate this specific area for its Choice of shops?

(n = all respondents)



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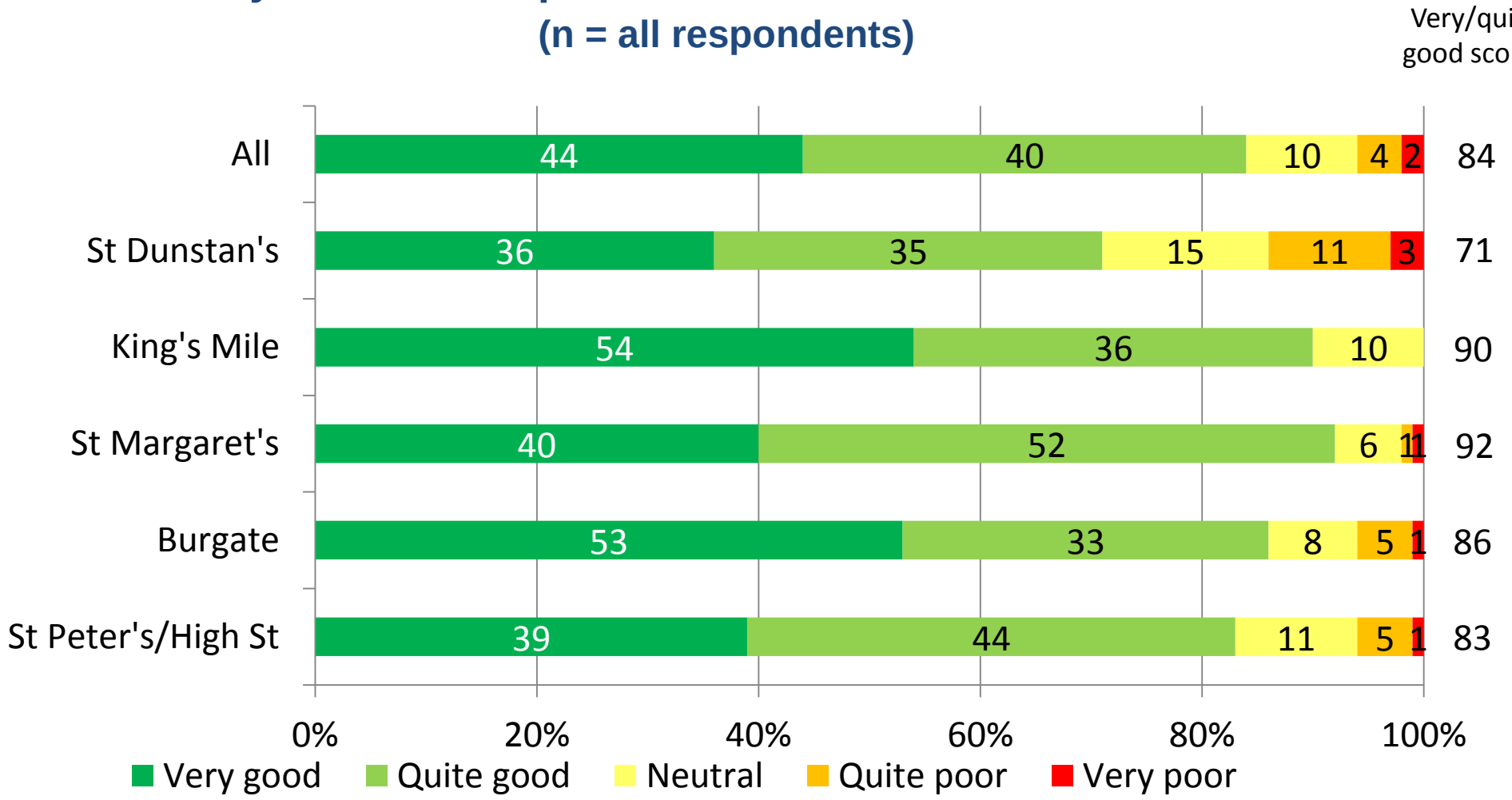
Area ratings: Safety/security (Spring 17)

How would you rate this specific area for its Safe/secure environment?

(n = all respondents)



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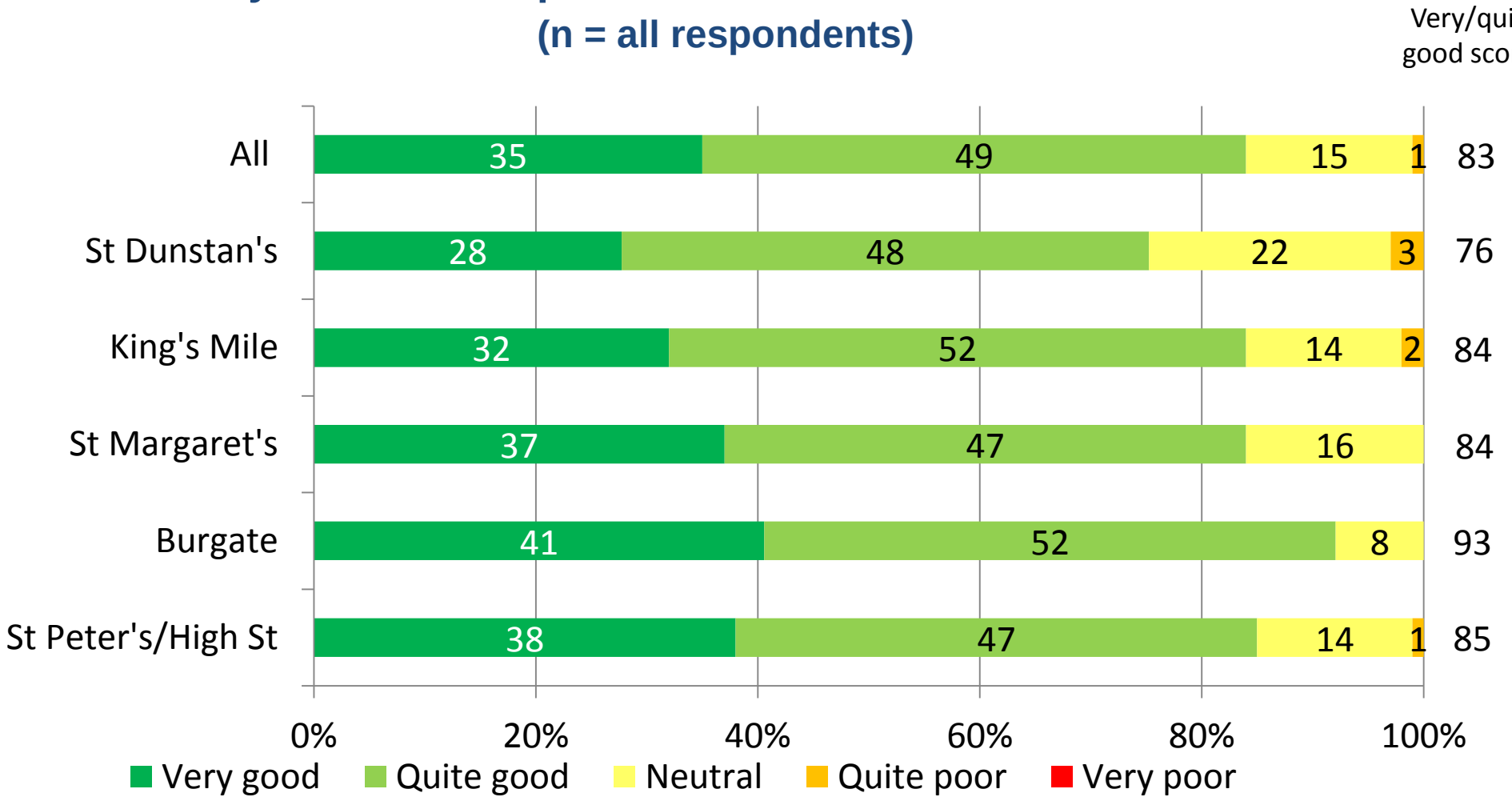
Area ratings: Safety/security (Spring 15)

How would you rate this specific area for its Safe/secure environment?

(n = all respondents)



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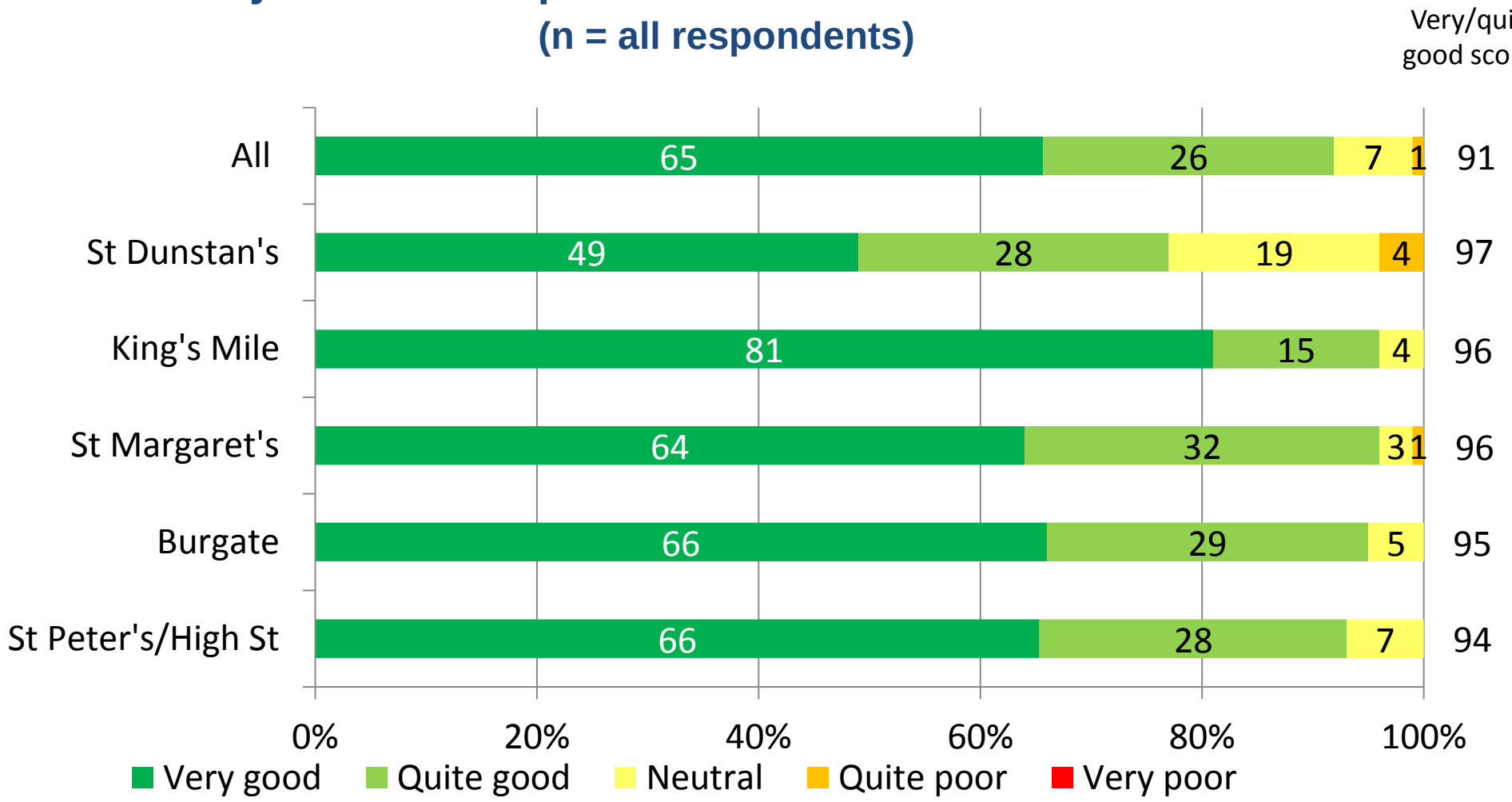
Area ratings: Safety/security (Spring 13)

How would you rate this specific area for its Safe/secure environment?

(n = all respondents)



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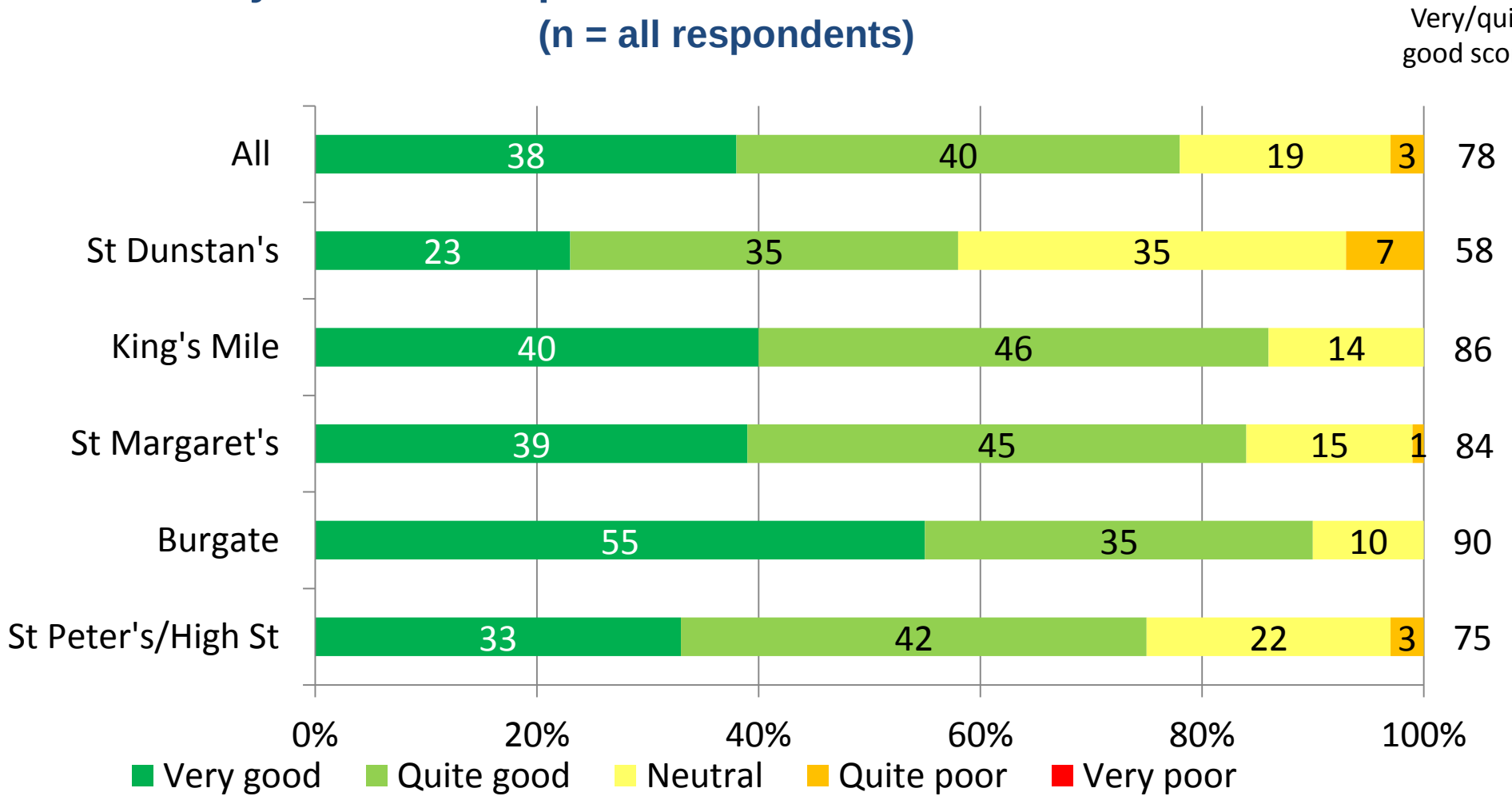
(n = all respondents)



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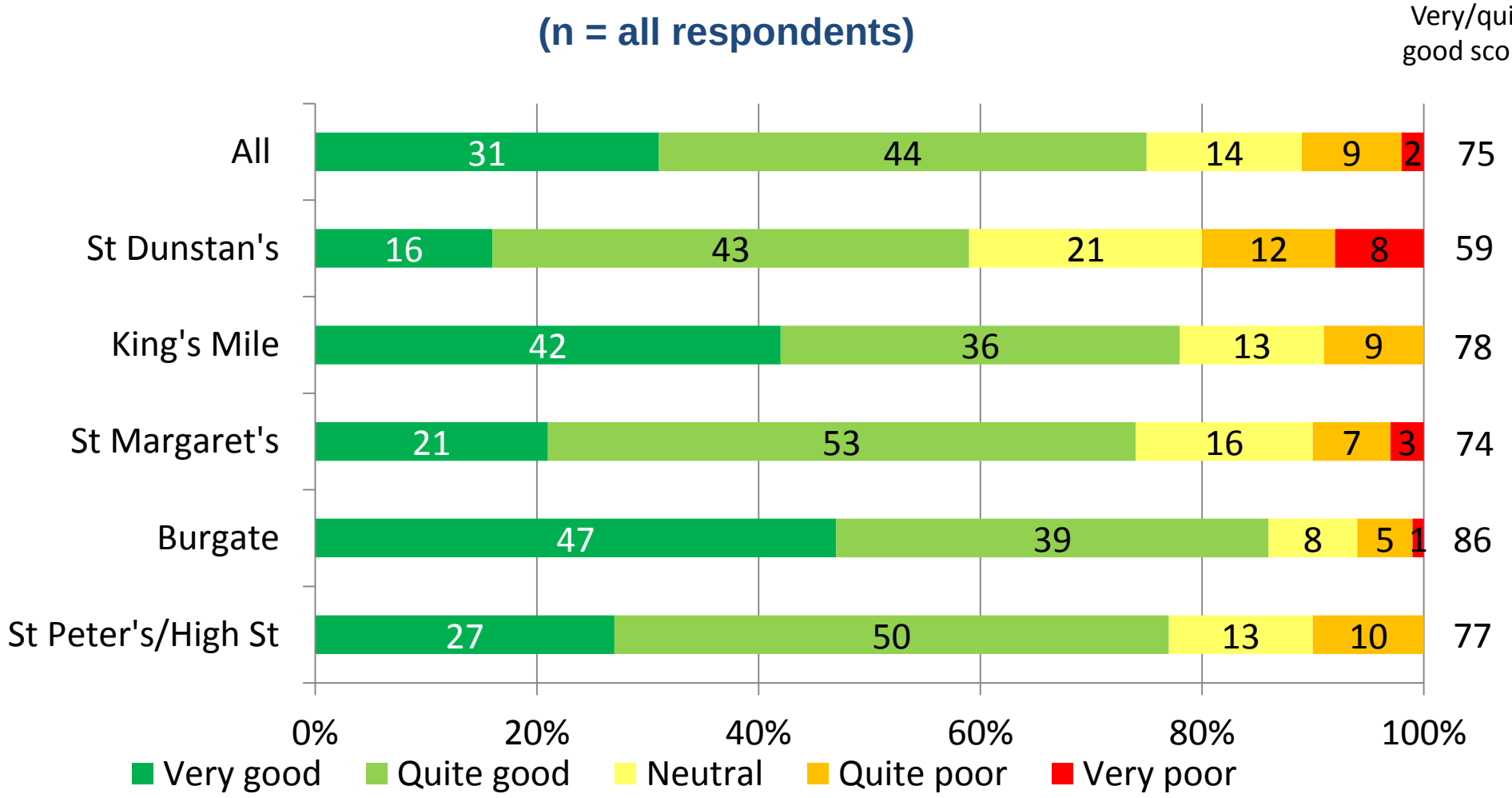
Area ratings: Cleanliness (Spring 17)

How would you rate this specific area for its Cleanliness?

(n = all respondents)



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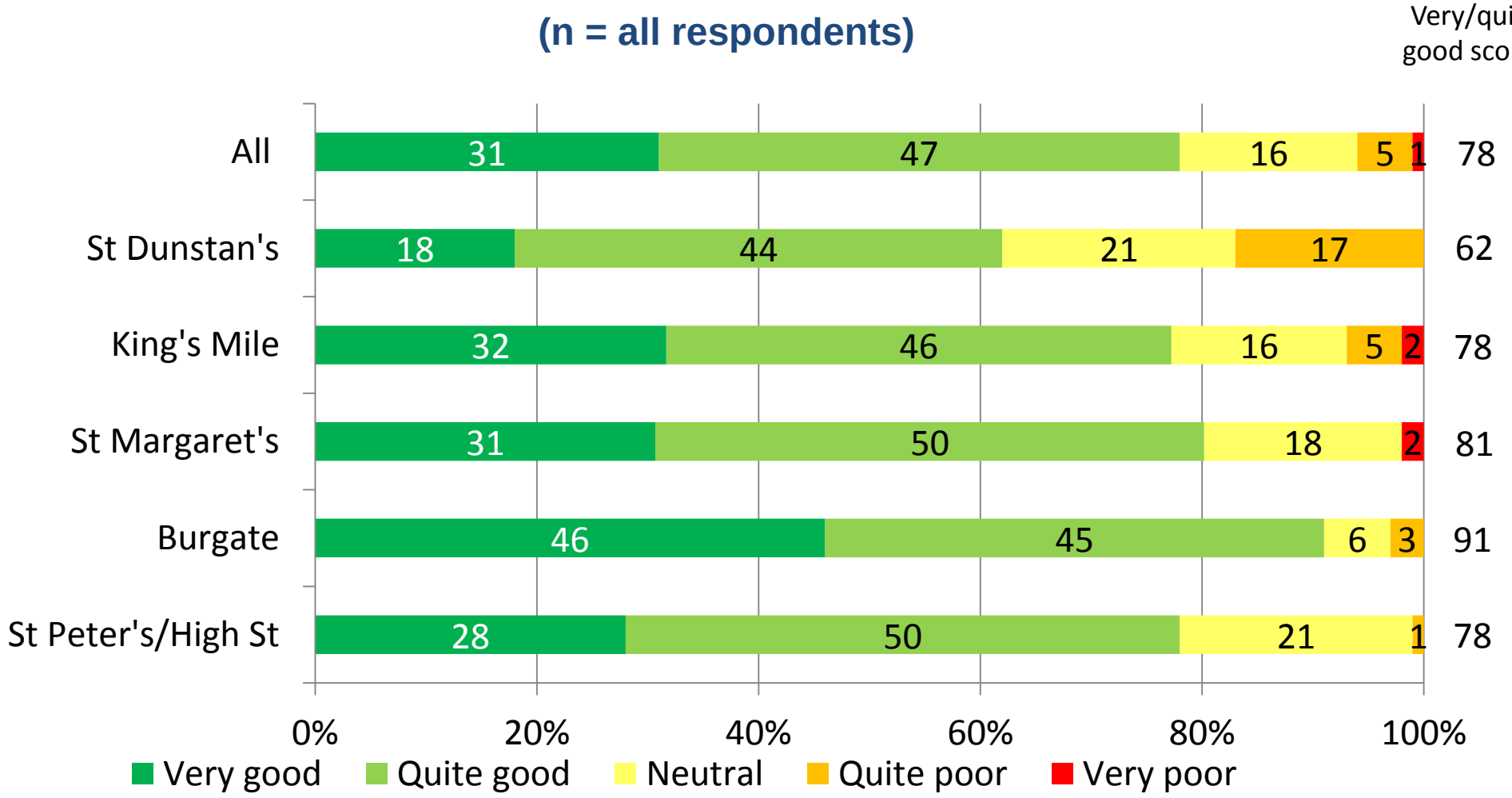
Area ratings: Cleanliness (Spring 15)

How would you rate this specific area for its Cleanliness?

(n = all respondents)



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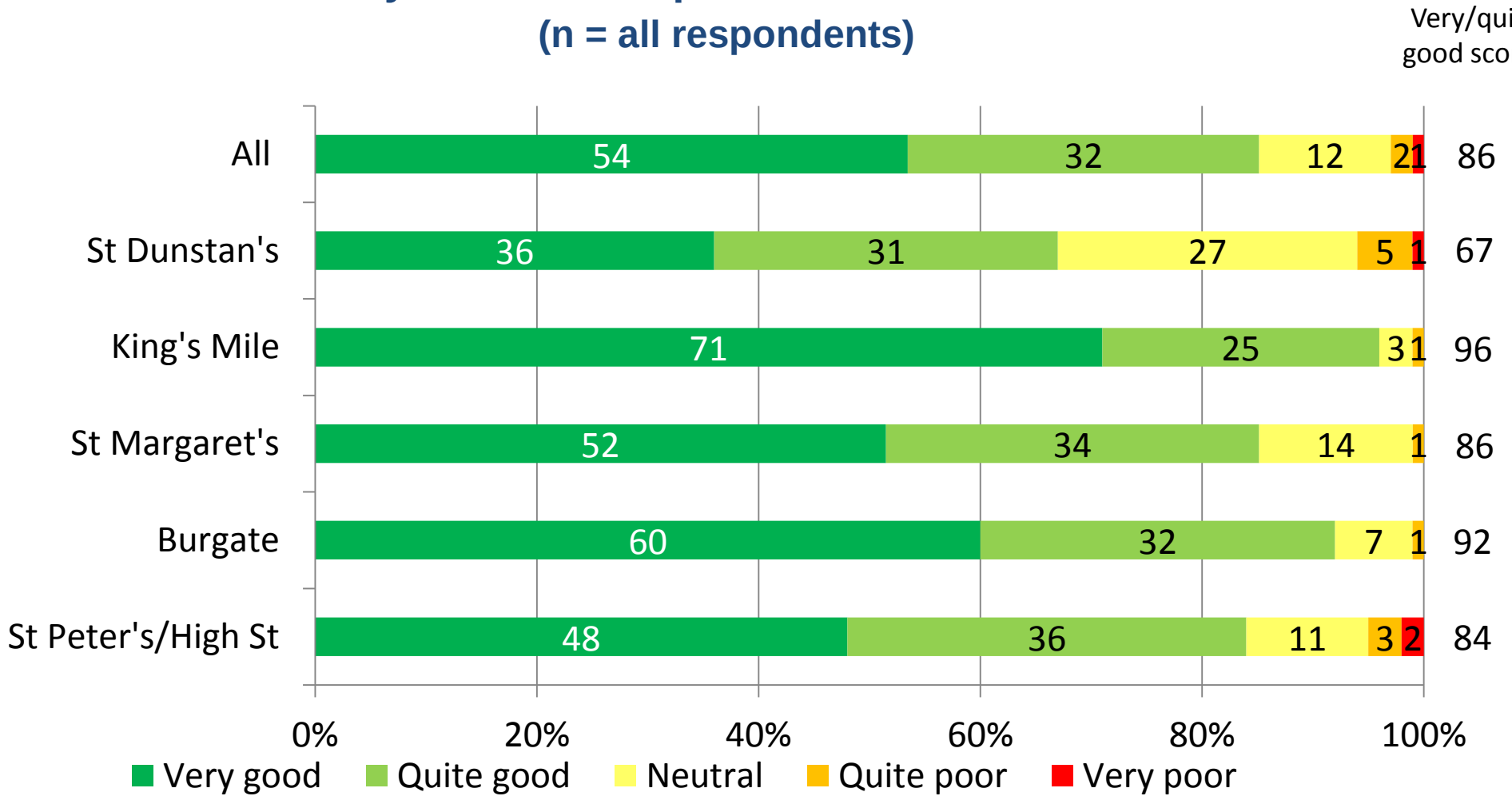
Area ratings: Cleanliness (Spring 13)

How would you rate this specific area for its Cleanliness?

(n = all respondents)



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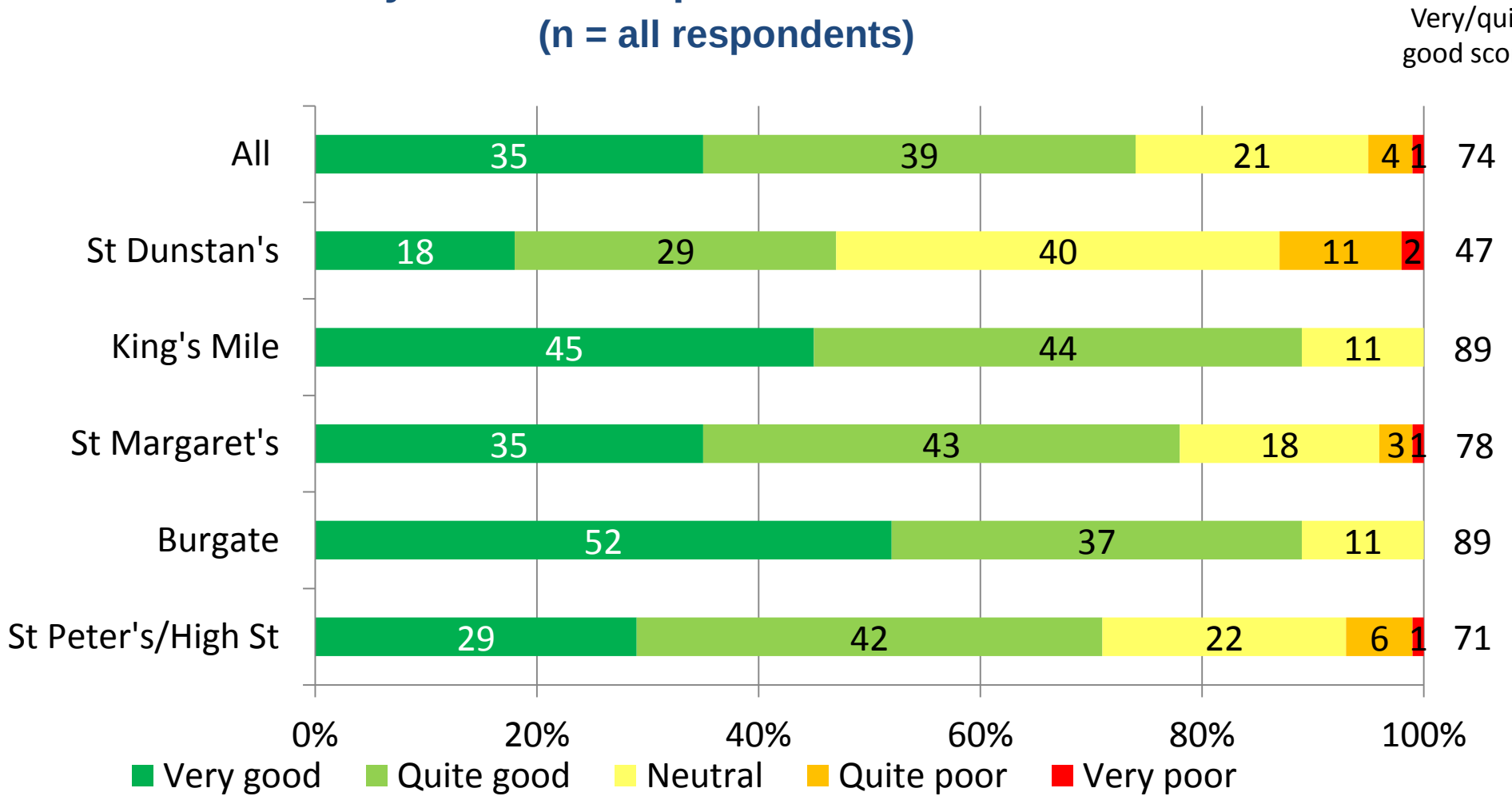
Area ratings: Cleanliness (Spring 11)

How would you rate this specific area for its Cleanliness?
(n = all respondents)



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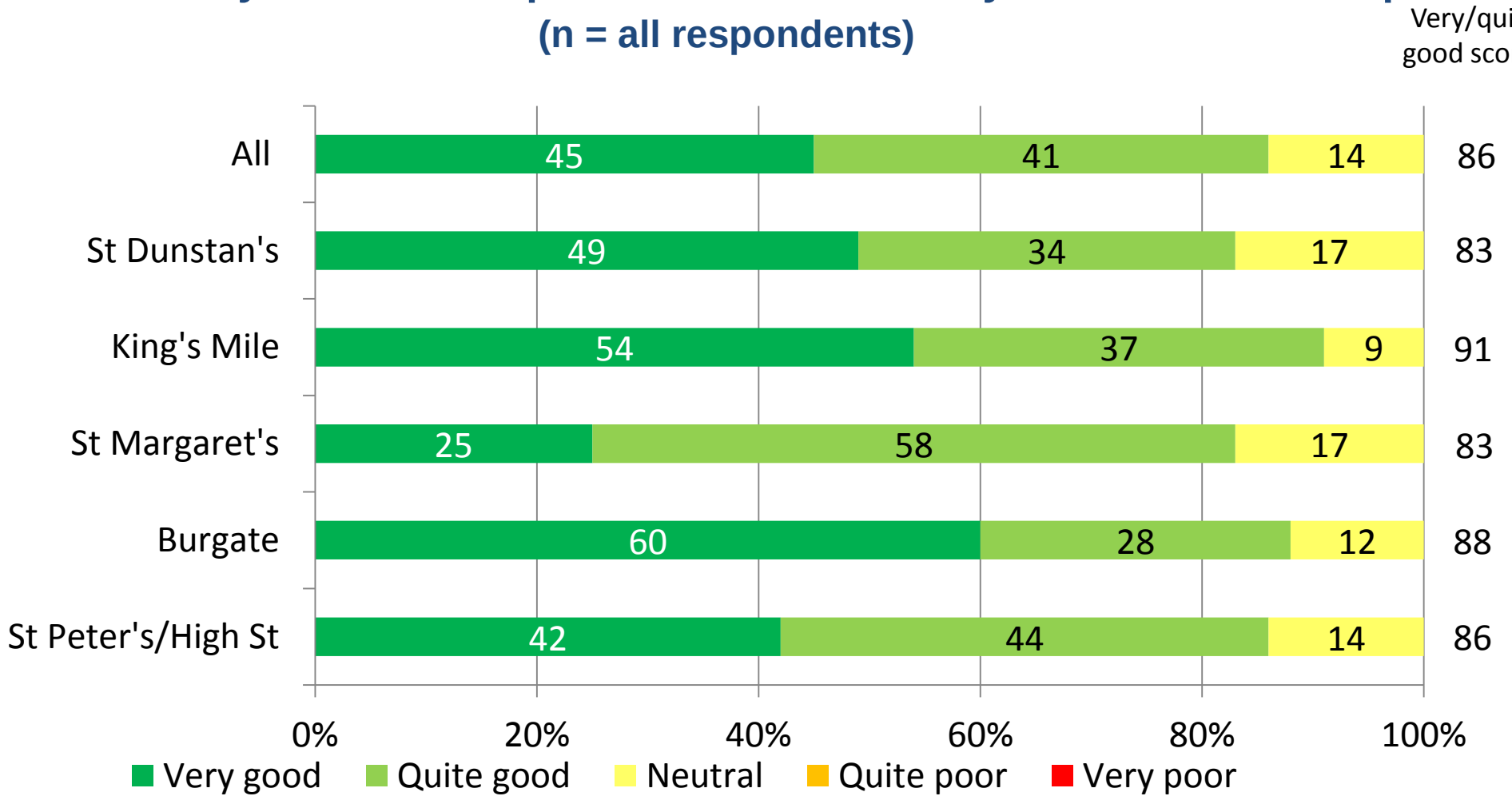
Area ratings: Service in the shops (Spring 17)

How would you rate this specific area for Friendly Service in the shops?
(n = all respondents)



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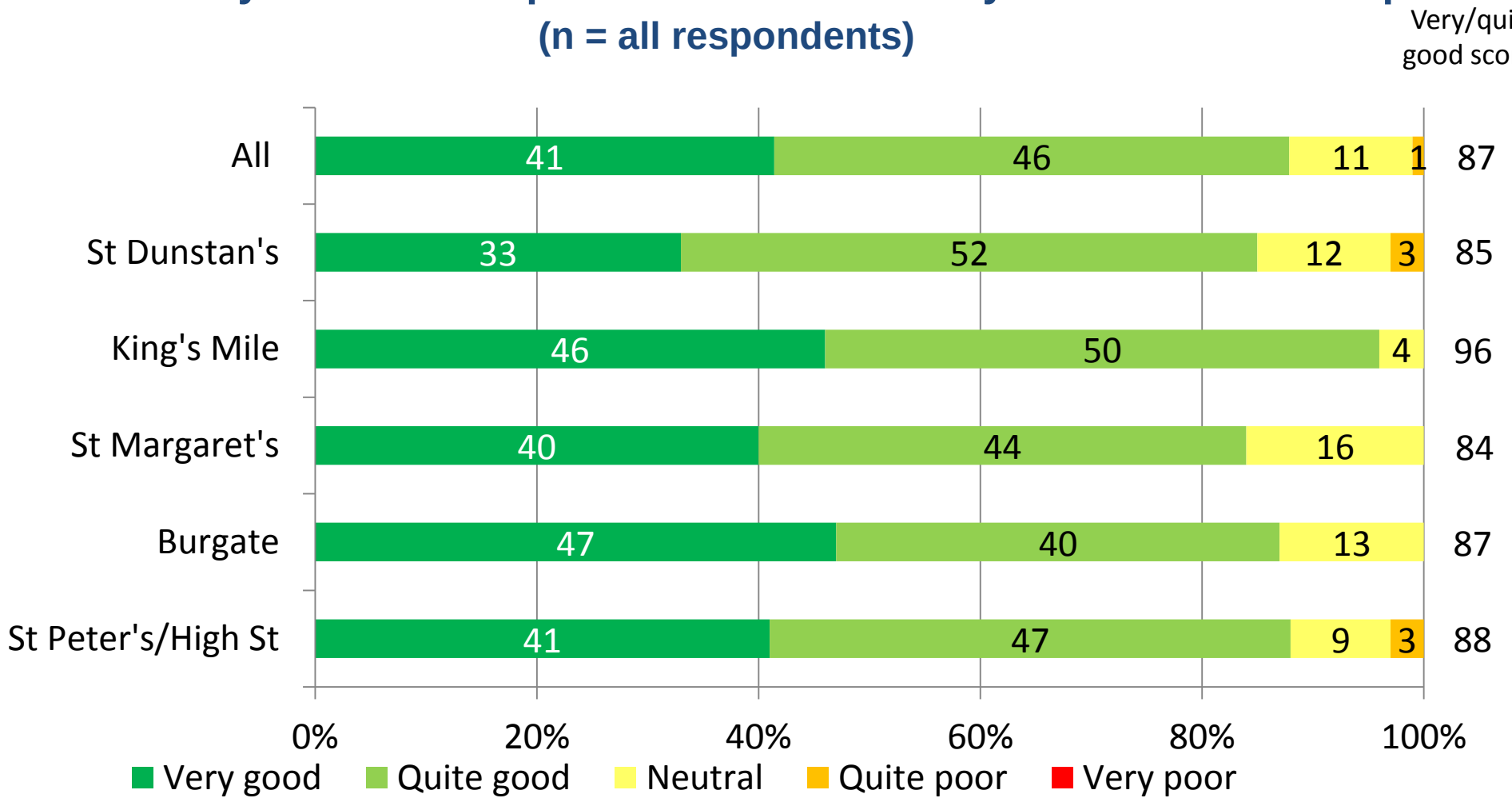
Area ratings: Service in the shops (Spring 15)

How would you rate this specific area for Friendly Service in the shops?
(n = all respondents)



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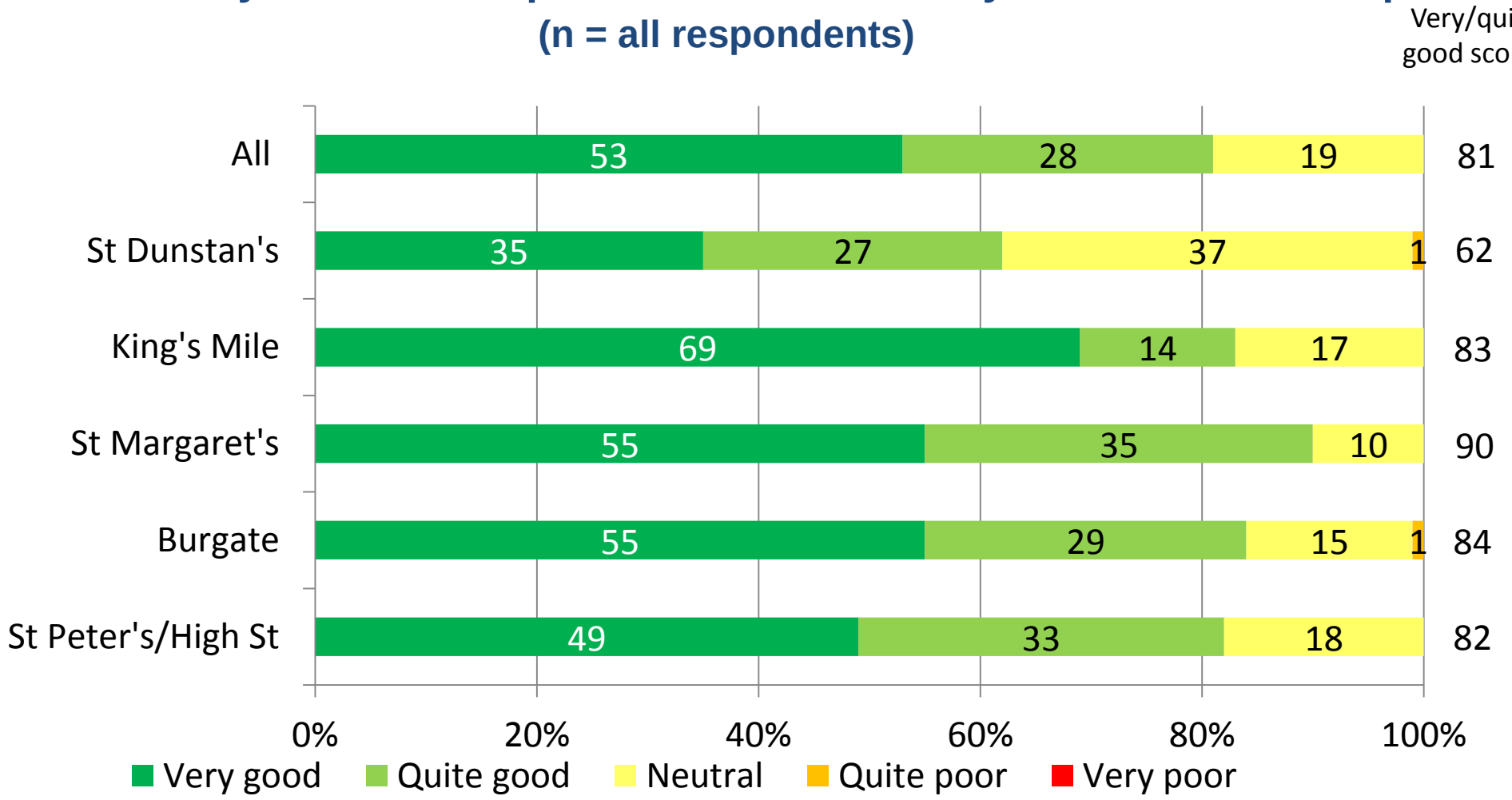
Area ratings: Service in the shops (Spring 13)

How would you rate this specific area for Friendly Service in the shops?
(n = all respondents)



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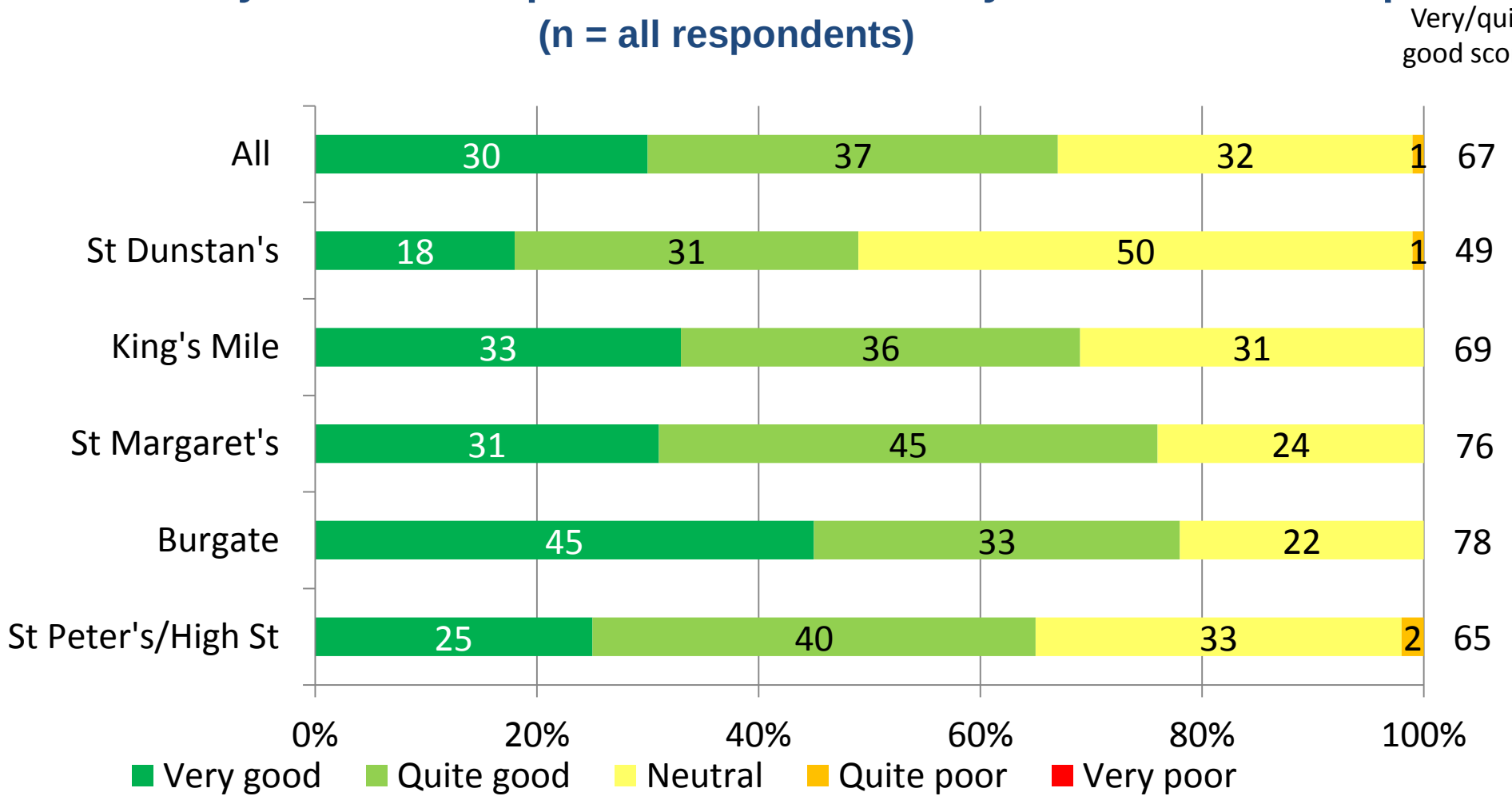
Area ratings: Service in the shops (Spring 11)

How would you rate this specific area for Friendly Service in the shops?
(n = all respondents)



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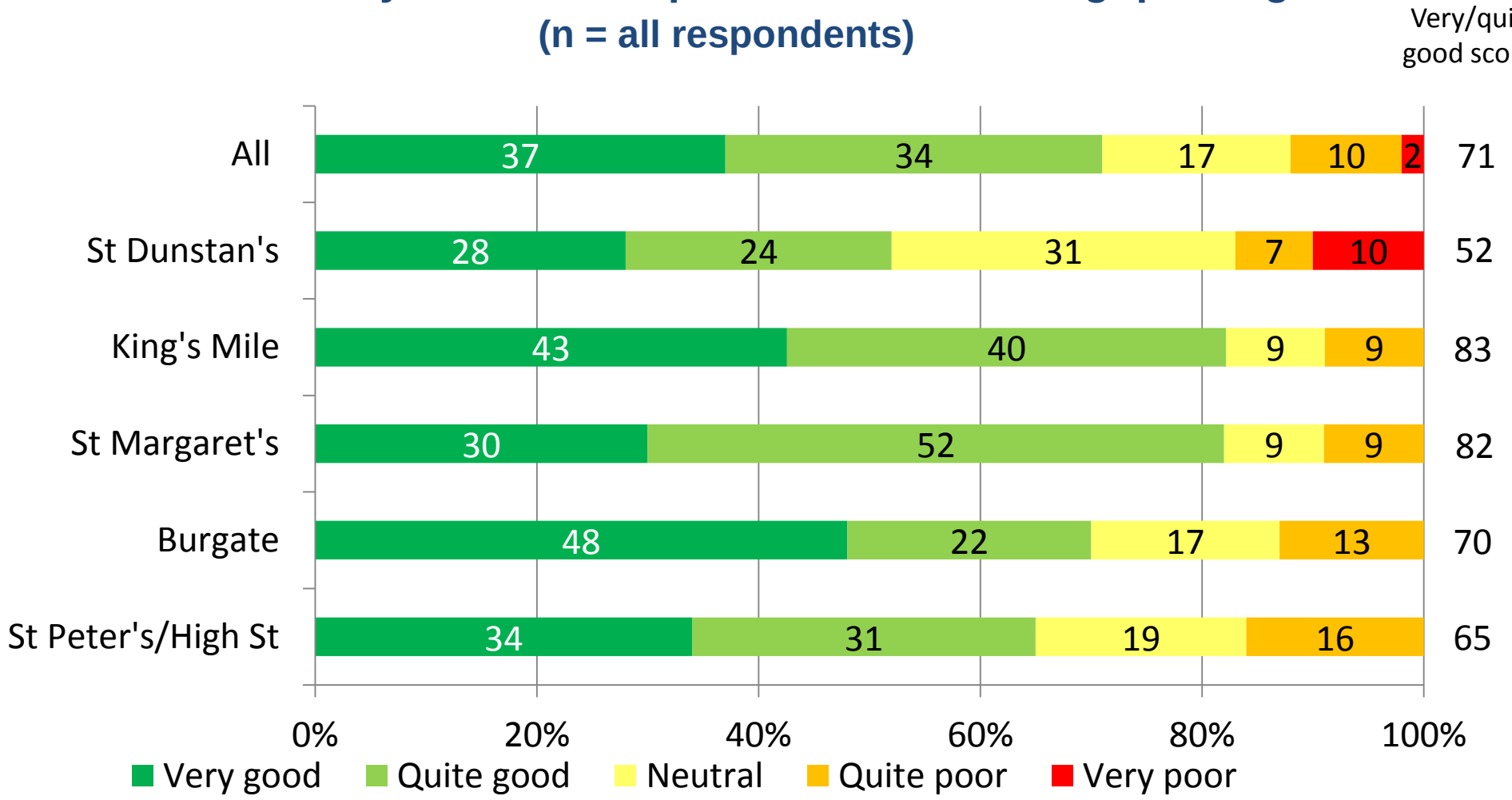
Area ratings: Signposting (Spring 17)

How would you rate this specific area for its Signposting?
(n = all respondents)



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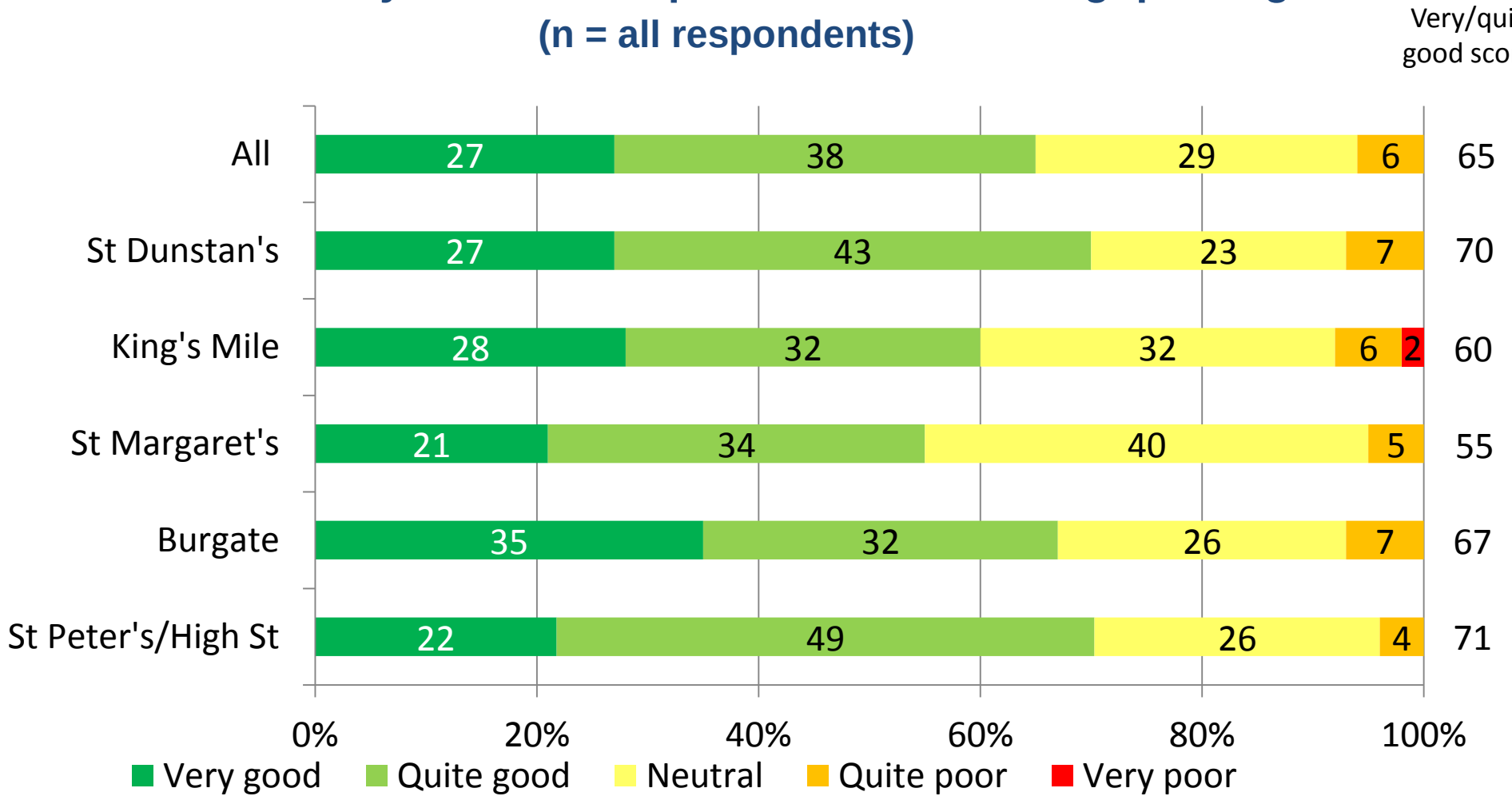
Area ratings: Signposting (Spring 15)

How would you rate this specific area for its Signposting?
(n = all respondents)



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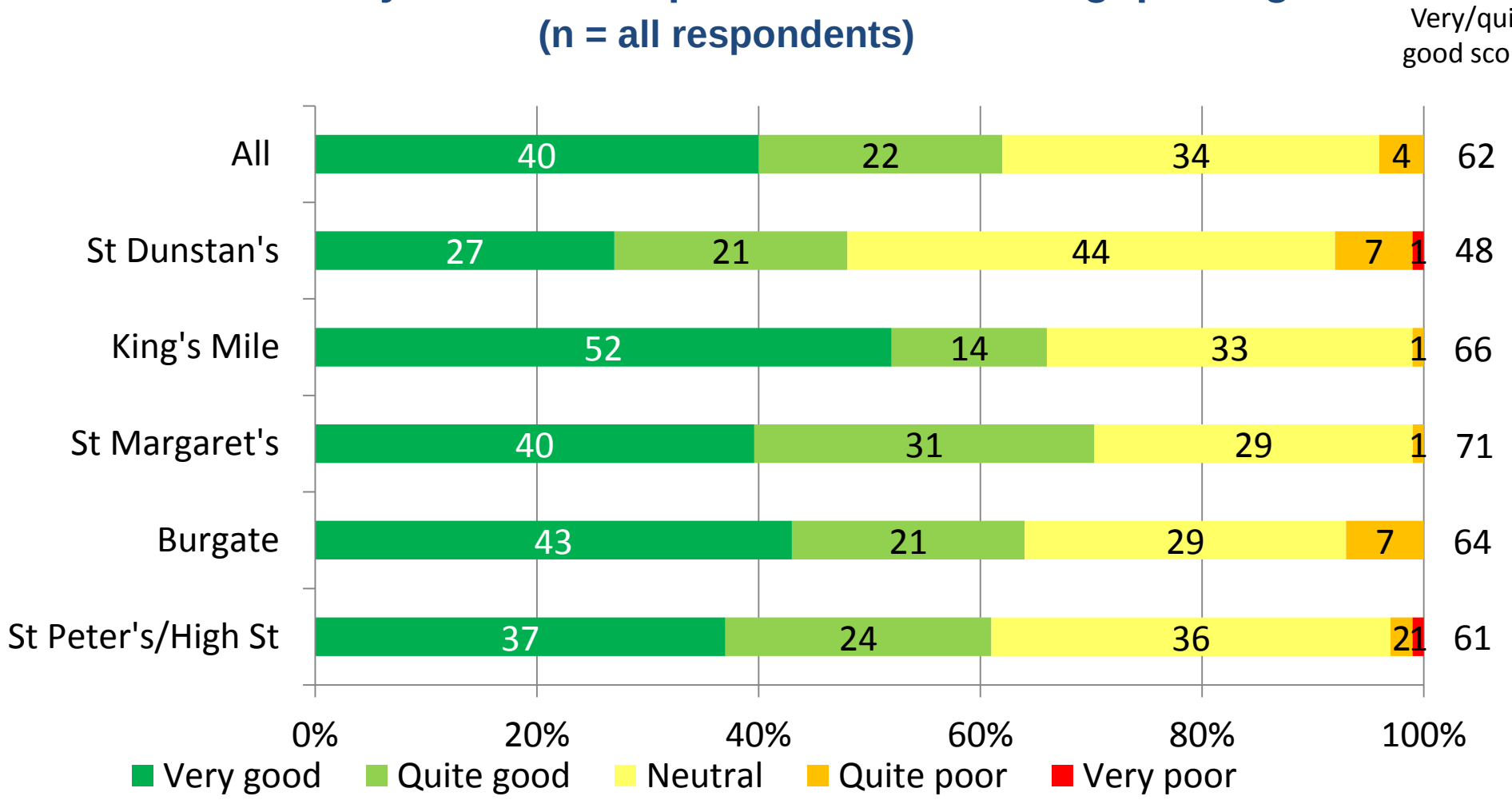
Area ratings: Signposting (Spring 13)

How would you rate this specific area for its Signposting?
(n = all respondents)



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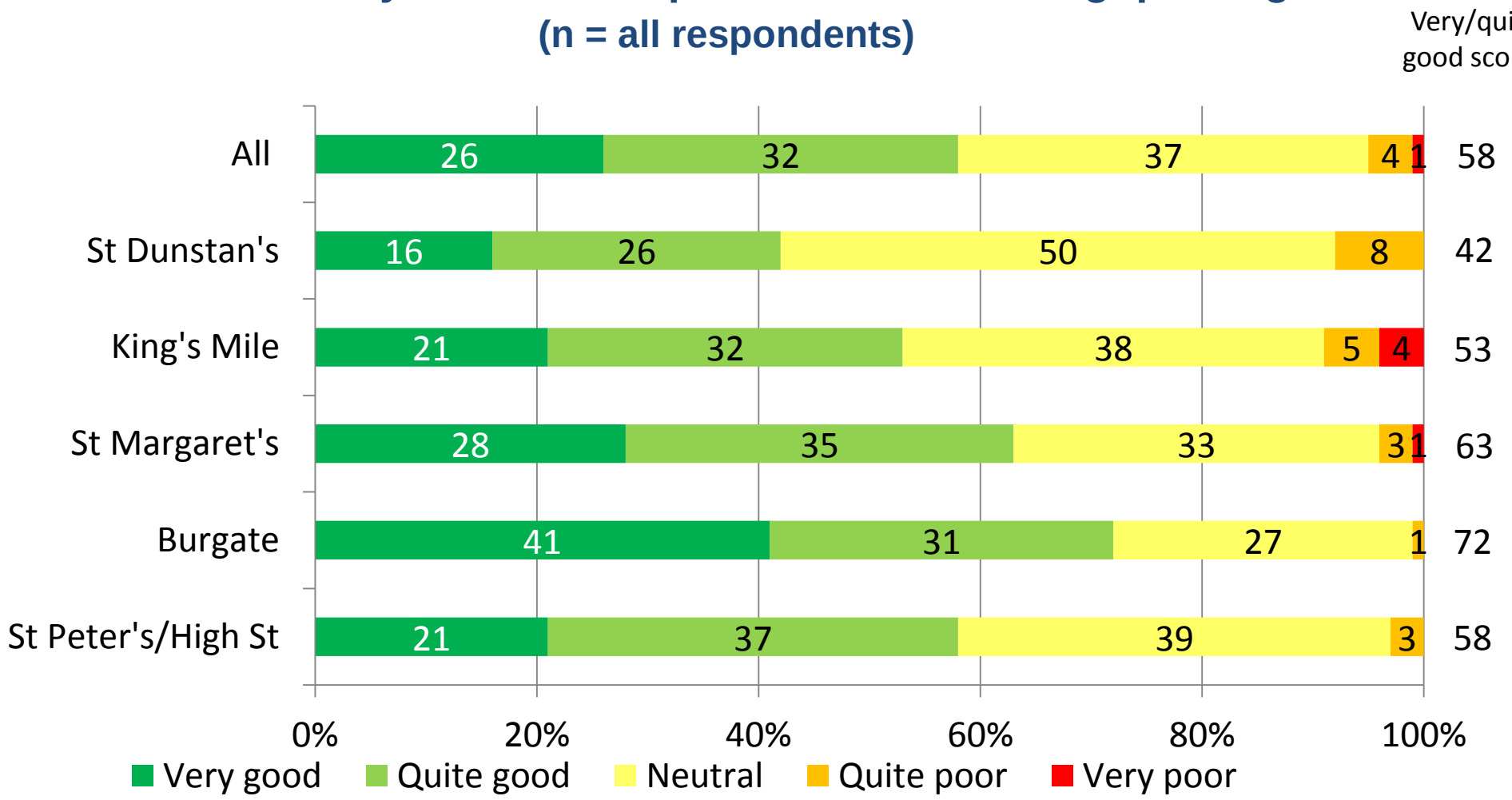
Area ratings: Signposting (Spring 11)

How would you rate this specific area for its Signposting?
(n = all respondents)



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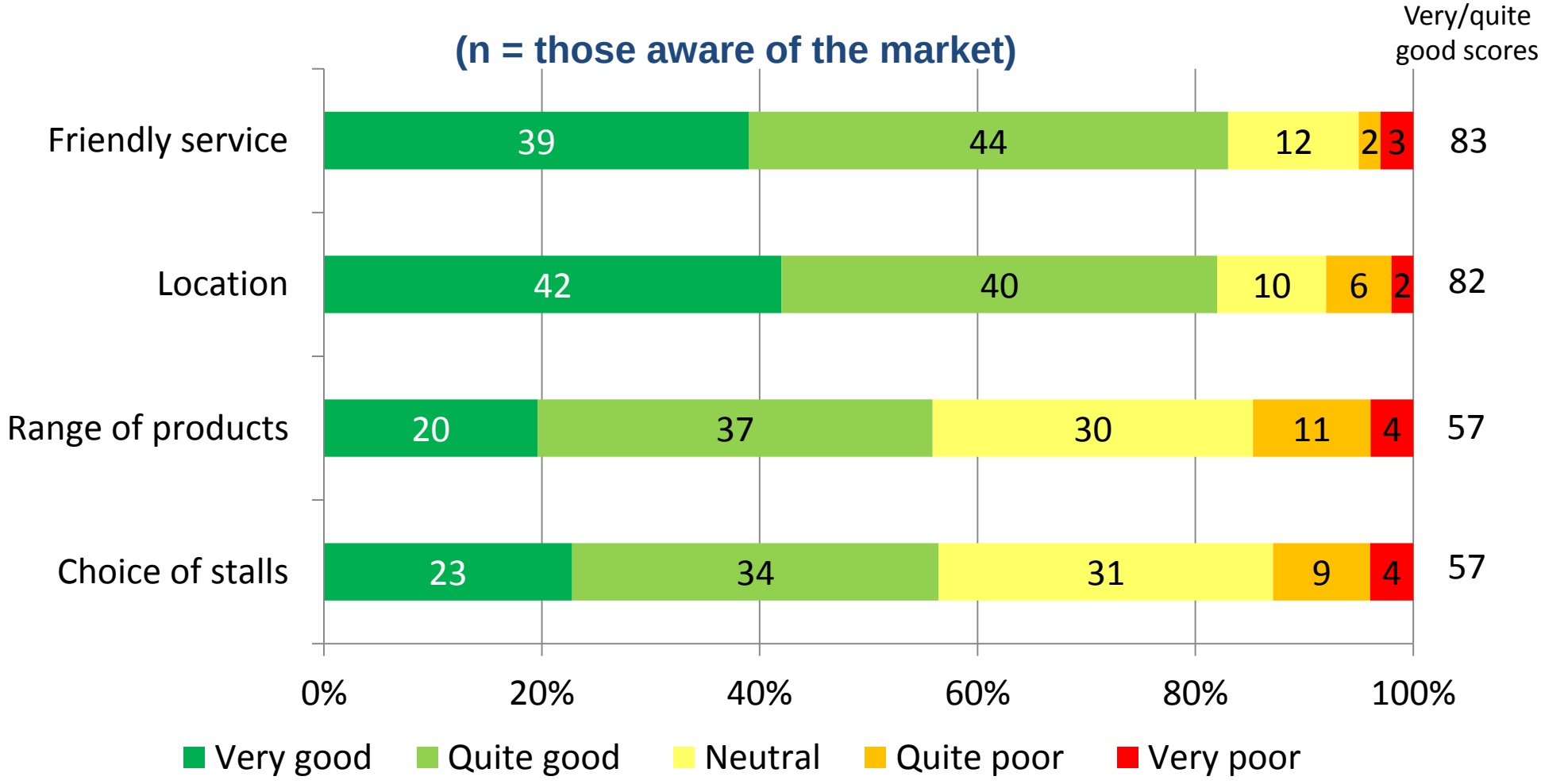
Market Ratings (Spring 17)

How would you rate Canterbury's retail market on the following?

(n = those aware of the market)



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Market Ratings (Spring 15)

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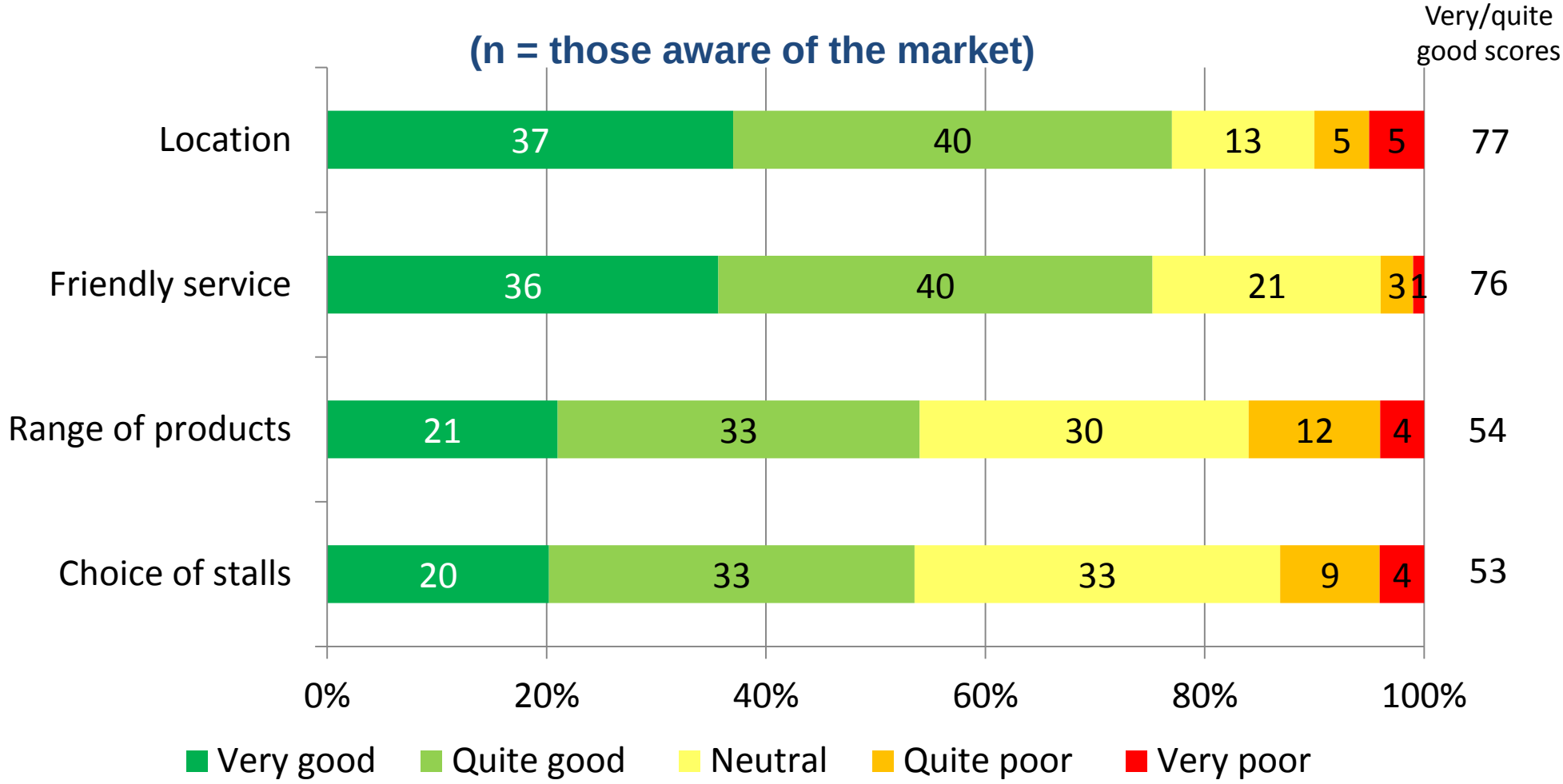

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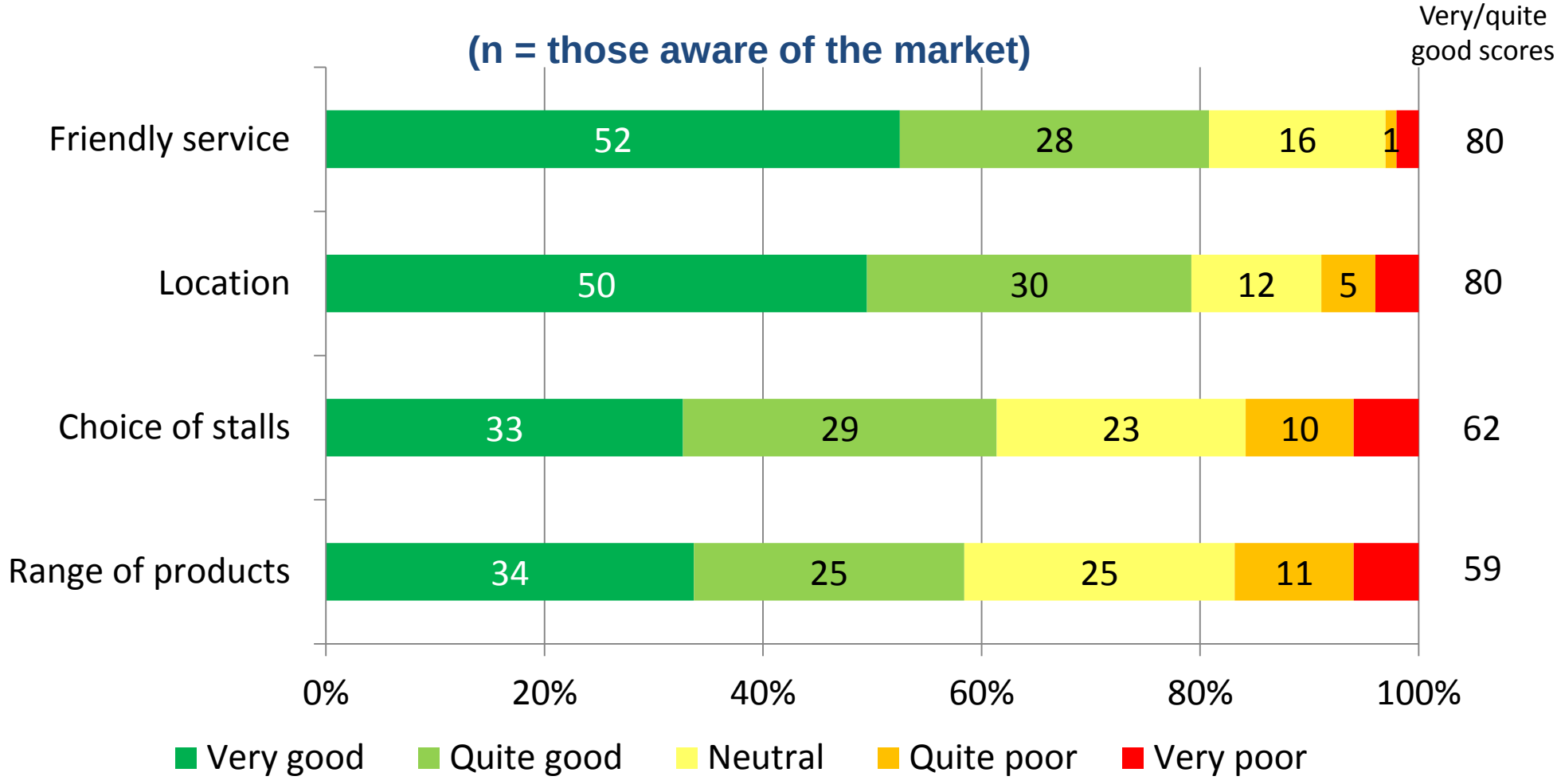
Market Ratings (Spring 13)

How would you rate Canterbury's retail market on the following?



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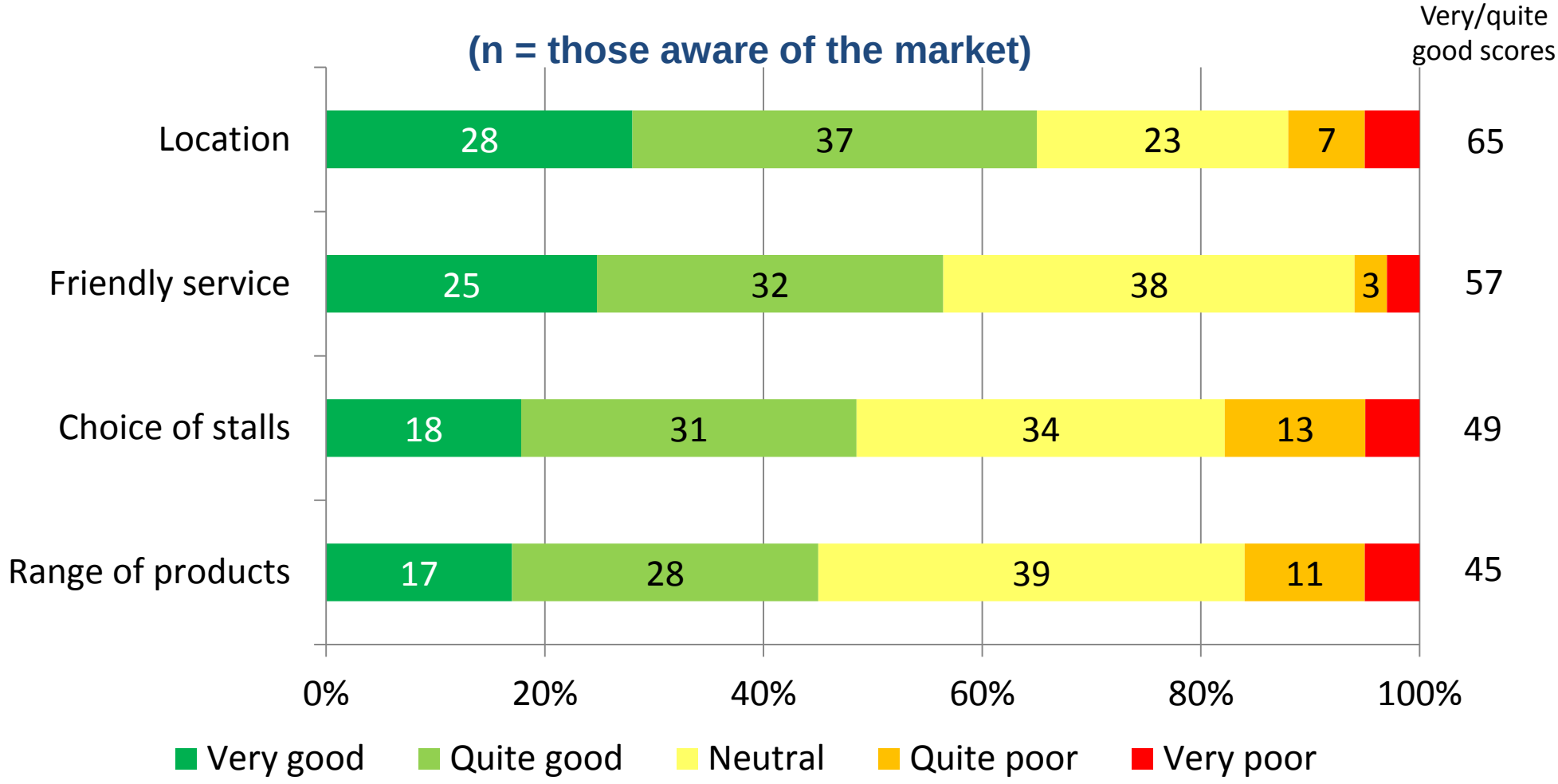
Market Ratings (Spring 11)

How would you rate Canterbury's retail market on the following?



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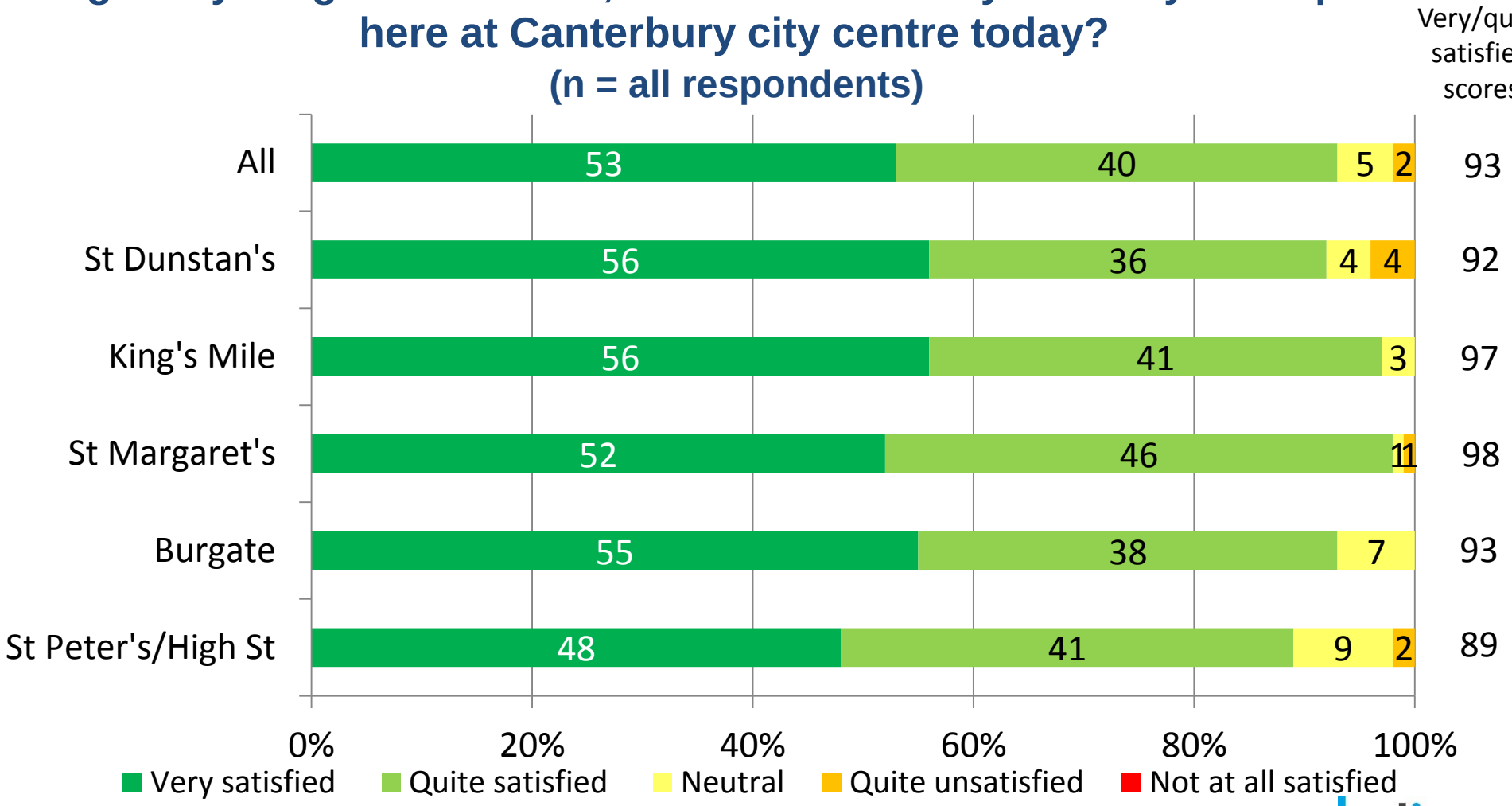
Overall satisfaction (Spring 17)

Taking everything into account, how satisfied are you with your experience here at Canterbury city centre today?
(n = all respondents)



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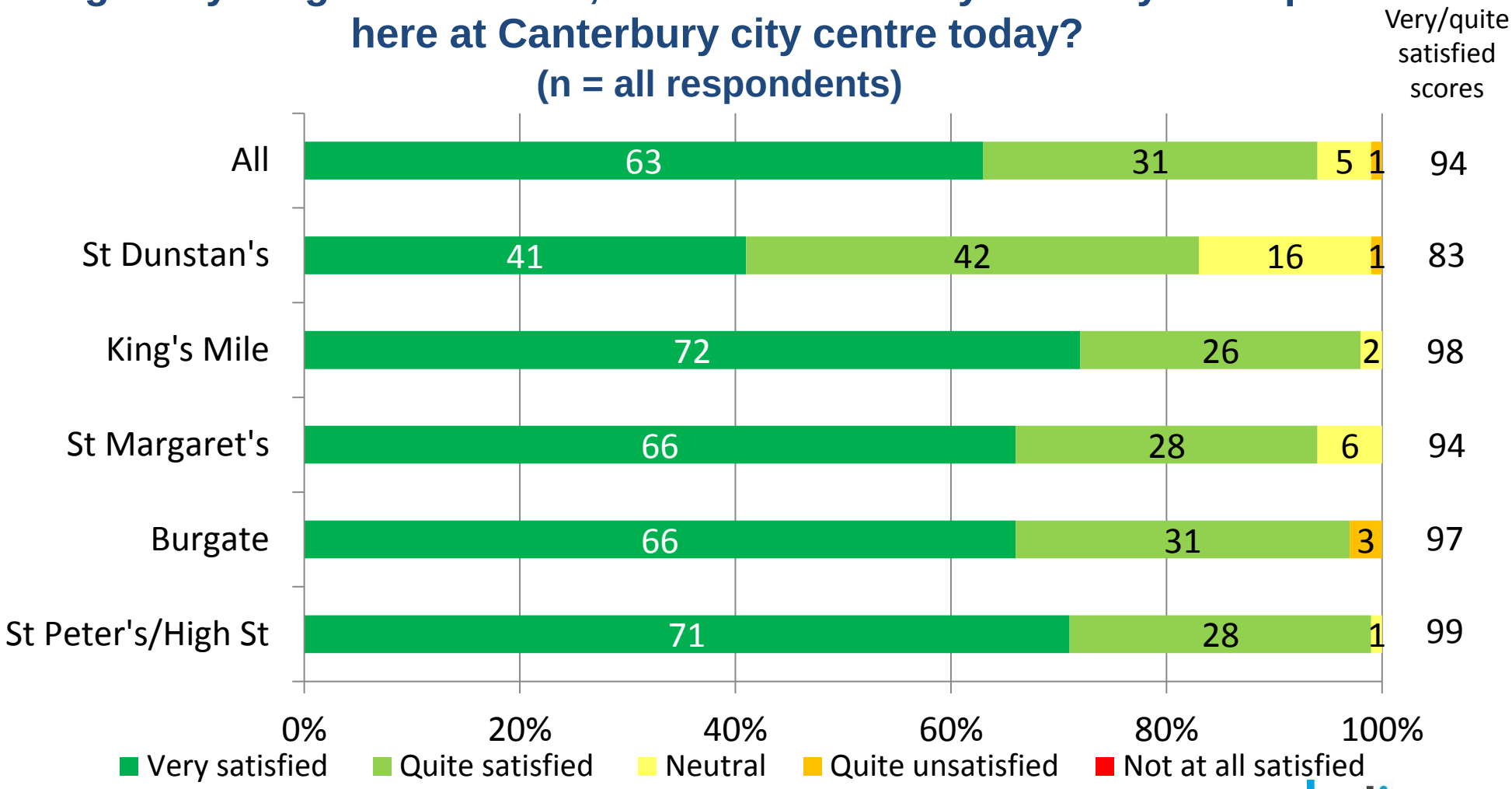
Overall satisfaction (Spring 15)

Taking everything into account, how satisfied are you with your experience here at Canterbury city centre today?

(n = all respondents)



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Overall satisfaction (Spring 13)

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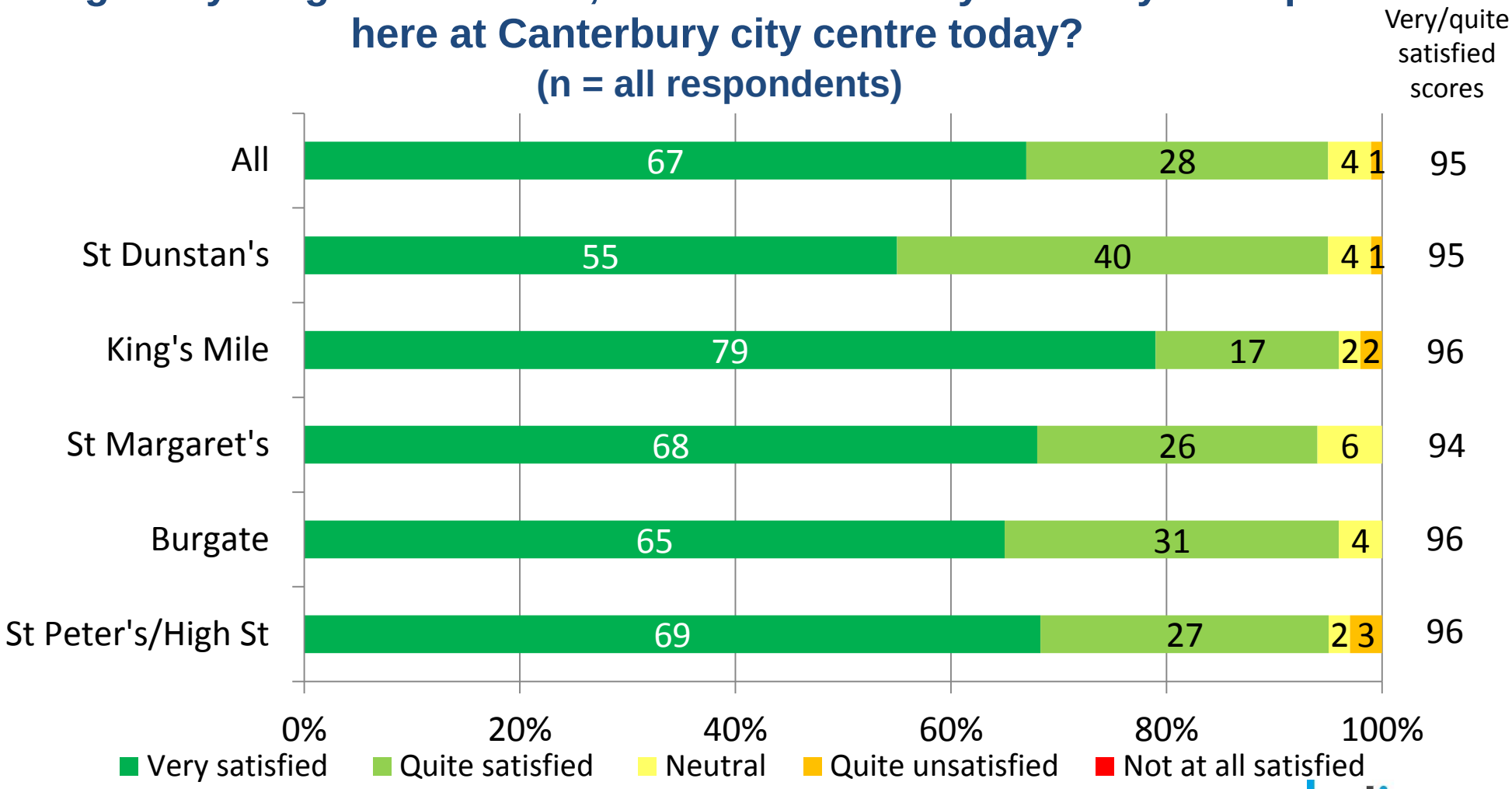
(n = all respondents)



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Overall satisfaction (Spring 11)

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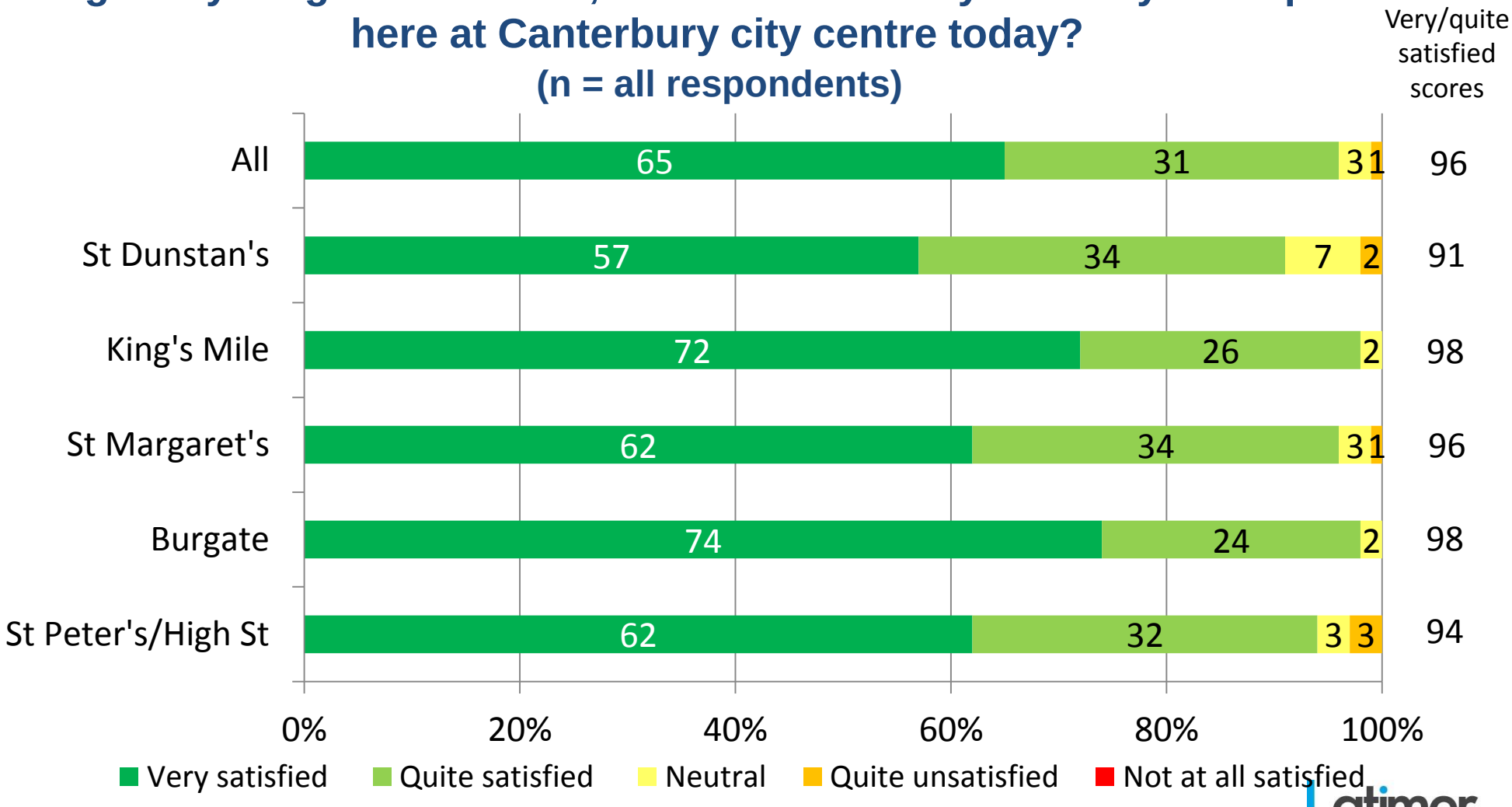
(n = all respondents)



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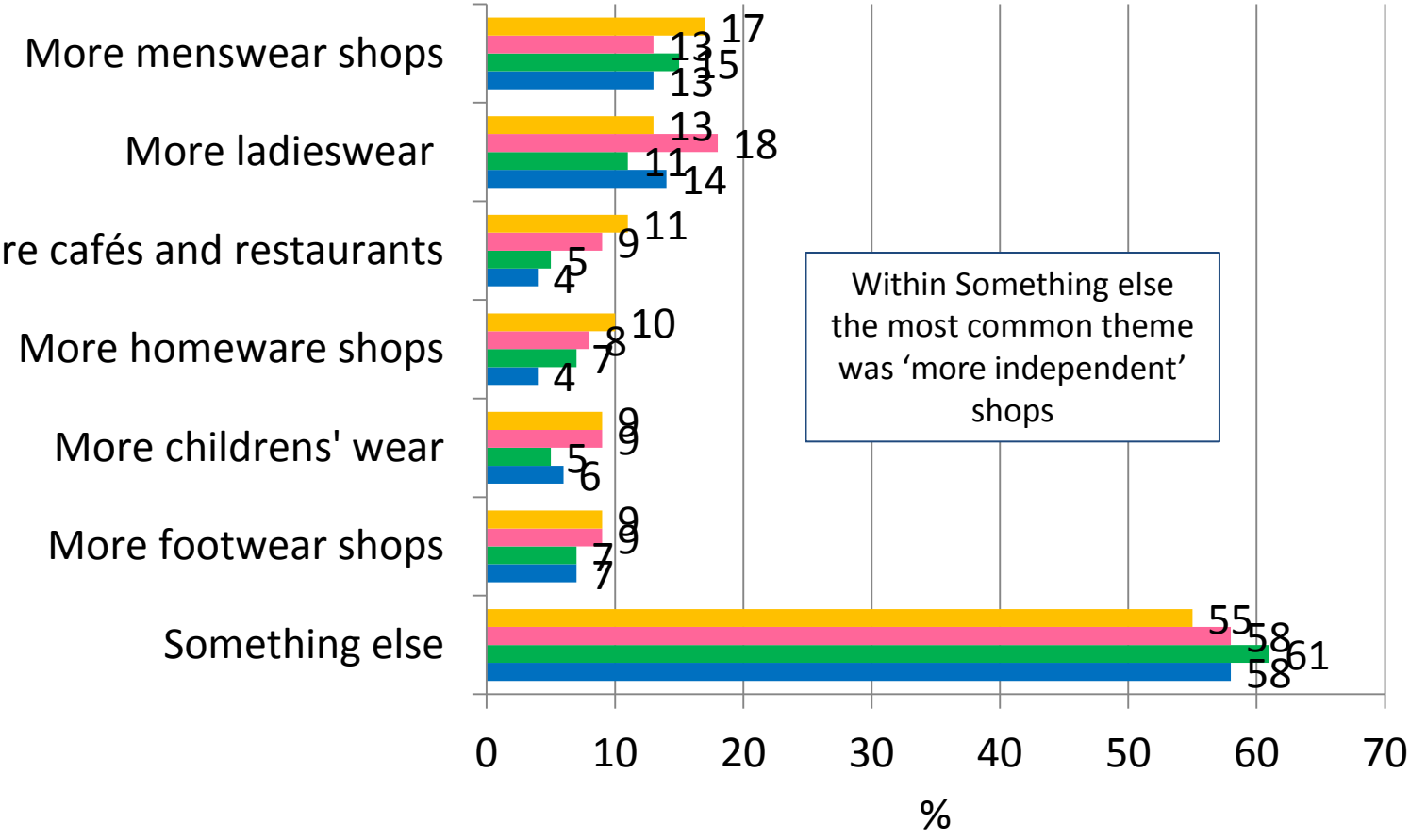
Retail Mix Changes

Which of these changes would make you visit Canterbury city centre more often?

(n = those who would like to see changes made)



Note: Question allowed for multi-response

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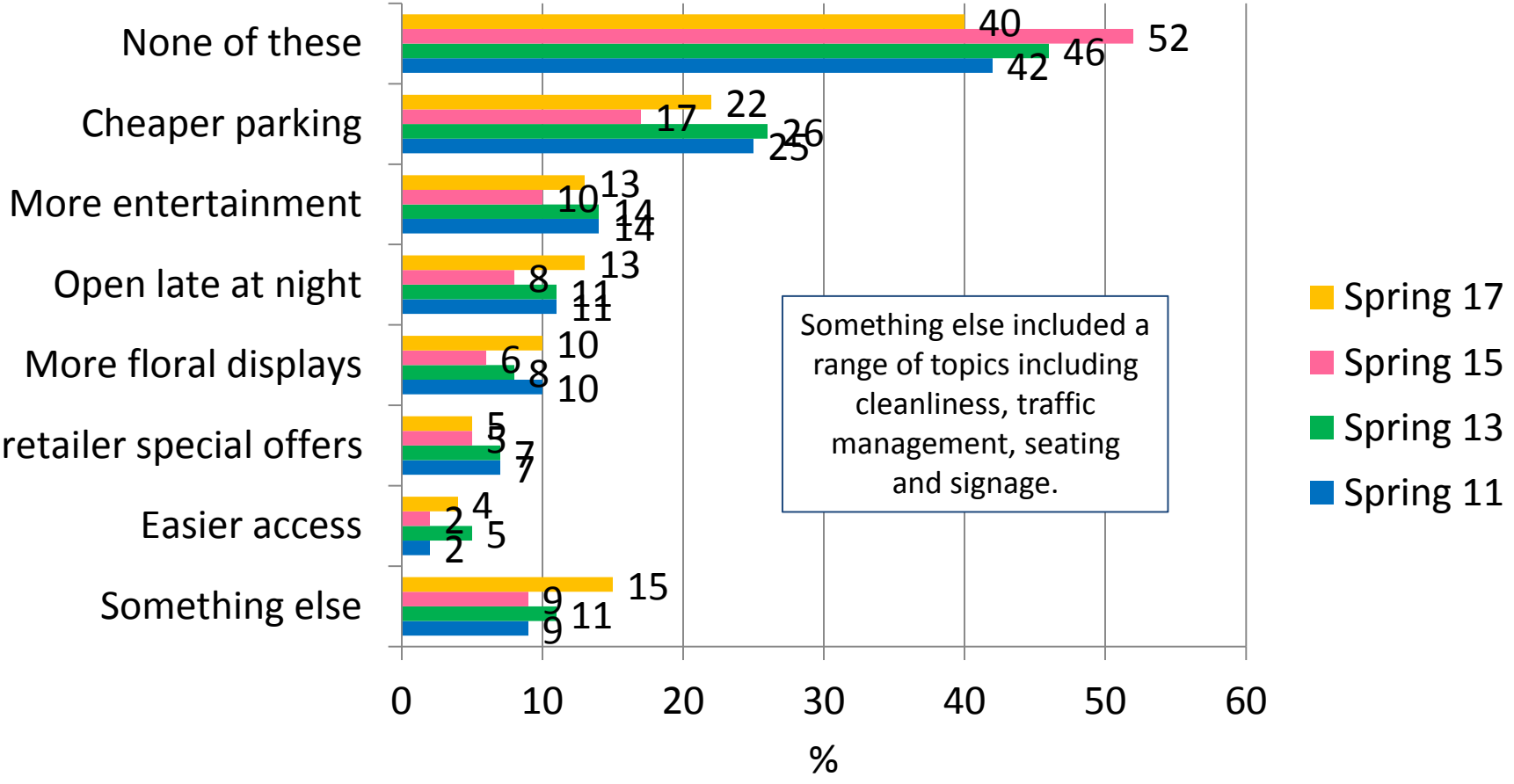
Service-related Changes

Which of these changes would make you visit the city centre more often?

(n = all respondents)



Note: Question allowed for multi-response

Something else included a range of topics including cleanliness, traffic management, seating and signage.

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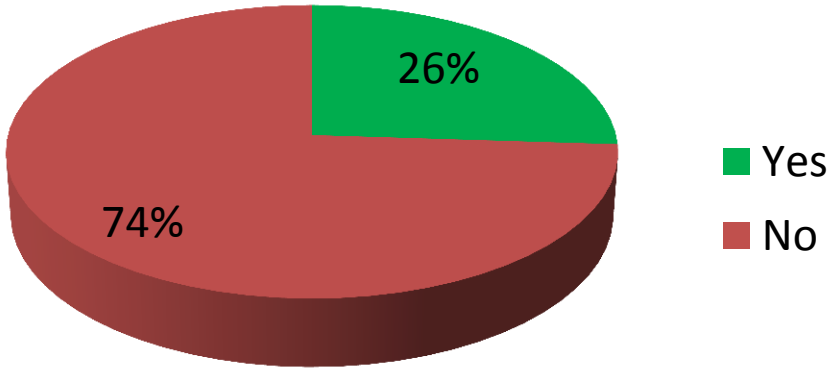
MyCanterbury

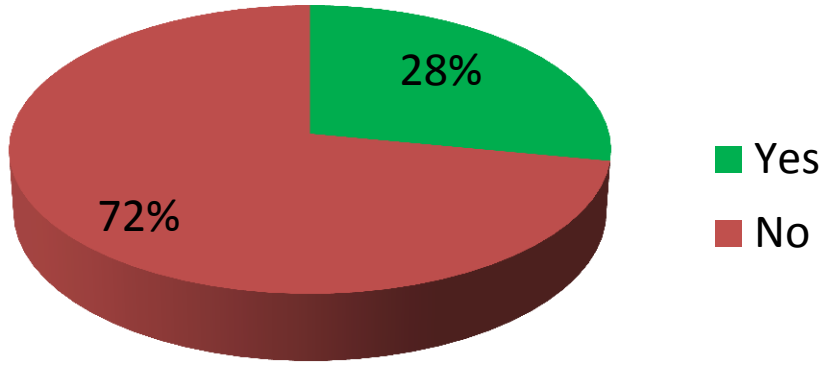
Have you heard of MyCanterbury?

(n = all respondents)

2015



2017



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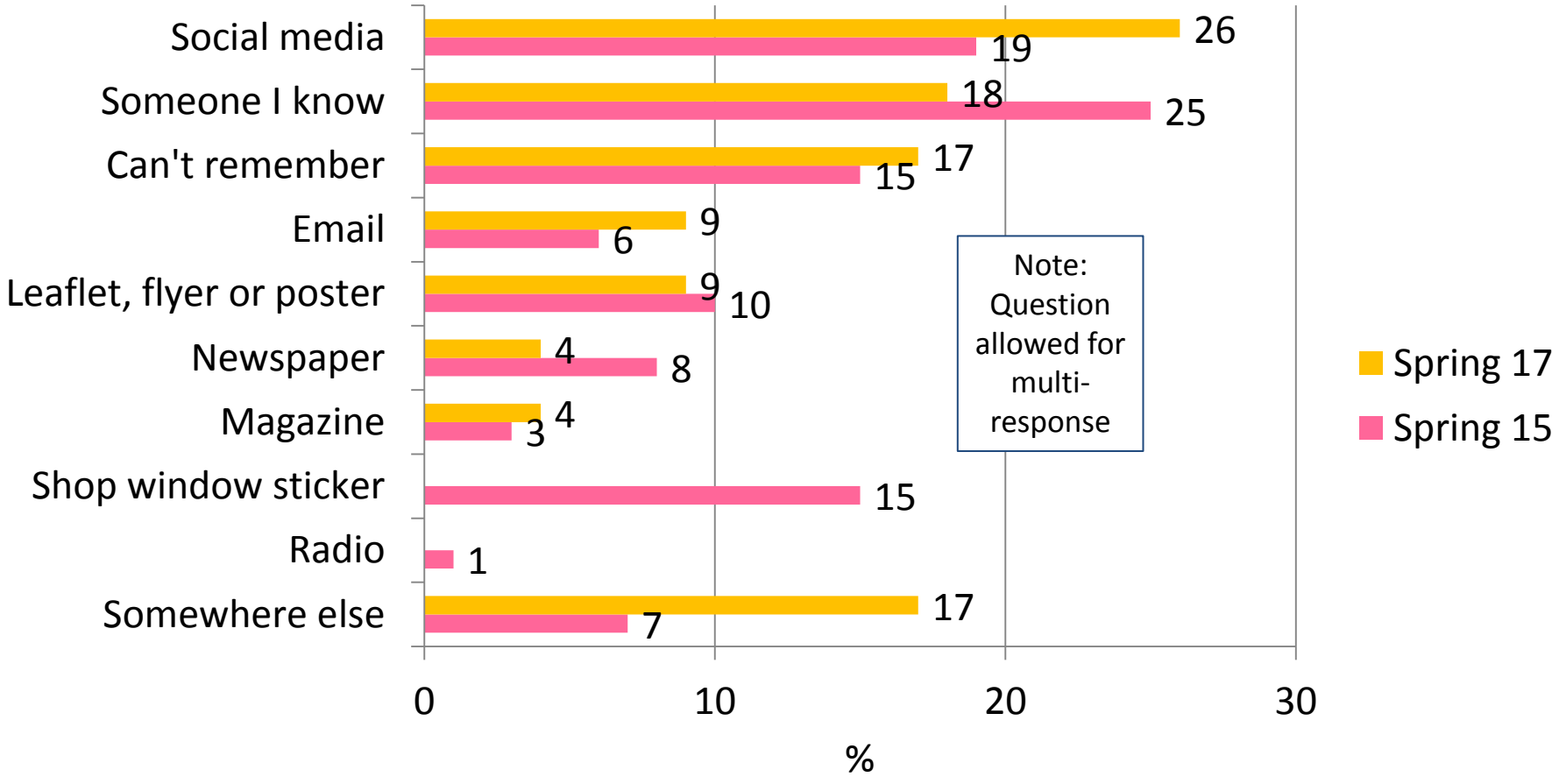
MyCanterbury communication

How have you heard of MyCanterbury?

(n = those aware of MyCanterbury)



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