Canterbury Connected

BUSINESS IMPROVEMENT DISTRICT

Canterbury City survey Research Report Spring 2015

Prepared for:	**Lucy Martin**
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Fieldwork dates:	**10th June – 14th June 2015**
Report date:	**22nd June 2015**

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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 both 2013 and 2011, using the same methodology and approach.

Fieldwork took place between 10th and 14th June 2015, 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 (56%). Although we know this is less strong than we would expect from a typical shopper survey, it is consistent with both the 2013 and 2011 research.
2. In age terms, the 2015 profile appears closer to that of 2011 than 2013; however 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 18-24, and the smallest being aged 35-44 years.
3. In social grade terms, the proportion of ABs has fallen, but with corresponding growth in the C1s. Taken as a whole ABC1 respondents made up 78% of all those interviewed in 2015 so this is identical to previous years. At the same time we saw a smaller proportion of DEs compared to previous research here.
4. Party size (1.6) was identical to 2013, so both are more in line with a typical shopper survey than 2011.
5. Looking at the demographics across the five sampling points, we can see that in 2015 the gender profile is highly consistent across the entire city centre, and more similar to 2011 than to 2013.

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Key Findings

6. The age profiles show some differences between the different locations, with St Dunstan's appearing to have an older profile and King's Mile and St Margaret's the youngest. Interestingly this is almost a reversal of the pattern in 2013, but otherwise the age profile is broadly similar across the city.
7. In social grade terms the fewer ABs is reflected across all sampling points, but again the proportion of ABC1s is quite consistent, ranging from a low of 75% up to 81% at the different sample points across the city.
8. Across the whole sample 'locals' (63%) made up the largest segment, a very similar proportion to what we saw in both 2013 and 2011. The next biggest group was the 'day trippers/visitors' (23%), followed by the 'tourist/holidaymakers' making up 10%. Again our 'locals' were more prevalent in St Dunstan's (as in previous years) but we also found more in King's Mile than previously. The highest proportion of 'day trippers' this time were to be found in St Margaret's.
9. 43% were 'employed full time' (vs. 38% in 2013 and 41% in 2011), and our next biggest group, the 'retired', made up 20%, but they were a smaller group than either 2013 or 2011. The highest proportions of 'retired' were to be found in Burgate and St Peter's/High Street. 'Students' (15%) were the next largest segment and they show little change across the three Spring surveys.

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Key Findings

10. Those who were 'alone' on the day of their interview (59%) made up a much larger proportion of our sample than previously, and almost three quarters of respondents in St Dunstan's were on their own. We were more likely to find respondents 'with friends' in King's Mile, St Margaret's and Burgate than the two other areas. Overall party composition showed much more variance across the five locations in 2015 than in 2011 and slightly more so than 2013.
11. Average travel time (28 minutes) fell from 2013, but it is also close to the 2011 figure. So once again it is well above a typical shopping centre average (18 mins), reflecting both the sample make up and the larger Canterbury catchment.
12. In travel mode terms, those 'walking' were once more our biggest group (40%), showing another increase over the most recent survey. Those travelling by 'car' (36%) were our next biggest group. Car use appears to have stabilised somewhat from last time, whilst 'bus' use (10%) showed another decline as did use of 'park and ride'.
13. More than 8 out of 10 respondents (84%) were actually shopping on the day they were stopped, back to the same level as 2011, this comes after the decline we saw in 2013. What is interesting is that the proportion of shoppers increased in all locations, the most significant being seen for those in Burgate.

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Key Findings

14. For those shopping on the day of their interview, the average time spent shopping (141 minutes) showed a sharp rise after the decline we saw last time.
15. What is interesting however is that despite the rise in the proportion shopping on the day, the numbers who say they *ever* shop for non-foods in Canterbury has fallen across the city with the one exception of St Peter's/High Street which has held up well.
16. The proportion who claim they *ever shop for groceries* in Canterbury city centre also shows a fall from 2013 (note: this was not measured in 2011). The decline is across all sampling points with the lowest level being measured in St Margaret's and the biggest fall vs. 2013 being seen in St Dunstan's.
17. Following the same theme, the number who say they *ever visit Canterbury for entertainment* reasons also shows a fall, although this is not to the same degree as with grocery shopping. Again this fall is consistent in all five of our sample areas.
18. Despite the decline in those claiming to ever shop for non-foods, the average visit frequency for those that do shop shows a healthy increase, up to 52 visits per annum. This is a good recovery after the decline we saw last time. We can see growth across the city centre vs. 2013, with the biggest increases being measured in Burgate and the King's Mile areas.

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Key Findings

19. The average visit frequency for grocery shopping in the city also rose this year to 78 trips per annum (up from 67 trips in 2013). We can see growth across the board, with the one exception of St Peter's/High Street, where there was no change.
20. The average visit frequency for entertainment in the city was 34 trips per annum, so this was steady vs. 2013. Increases in visit frequency are noted for St Dunstan's and King's Mile, whereas frequency actually fell in both St Margaret's and Burgate.
21. We again explored the main reason for visiting Canterbury on the day of their interview. Here we can see a profile closer to 2013 than to 2011. Those 'just browsing' (22%) make up the largest segment this time although this group is marginally smaller than in 2013. 'Non-food shoppers' (14%), made up our next biggest segment, slightly bigger than in 2013. 11% were 'meeting friends' and 10% 'visiting a particular shop'. St Margaret's had the largest proportion of 'non-food shoppers' and 'browsers', and King's Mile the smallest proportion of 'non-food shoppers', whilst St Peter's/High Street had the largest number of those 'visiting a particular shop'.
22. Exploring purchases by category, non-food conversion (47%) has stabilised after the drop we measured last time. Again there was variance across the five sampling points with the biggest growth being seen in Burgate and the sharpest decline measured in King's Mile.

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Key Findings

23. We can see a small fall in grocery conversion (22%) but the numbers here are most consistent across the three Spring surveys. This figure however hides some more significant movement within each area with good growth in King's Mile and Burgate and with declines elsewhere particularly in St Margaret's.
24. Entertainment conversion (here compared with catering conversion in 2011) increased slightly to 30% and with the exception of St Dunstans's where we saw no movement all other areas saw improvements vs. last time, the best rises being seen in King's Mile and Burgate.
25. We would expect to see spend rise with conversion. Here we have recovery in both non-food (£41.78) and grocery spend (£15.06) figures that are back to the levels seen in 2011. The main change however is in entertainment (£23.99) which is up from £15.37 in 2013, and significantly above the £8.19 measured in 2011 (again note this was for catering spend).
26. Once more we explored where shoppers would have made their purchases today if they had not made them in Canterbury. Interestingly, we can see again that around half of respondents only shop in Canterbury – this is consistent in all three surveys, and this is also consistent with our research in Whitefriars. We can see similar patterns to 2011 and 2013. My local town is still the biggest competitor (22%) but has fallen in proportion from last time. Westwood Cross (6%) is still the next biggest destination but again shows signs of decline. The pattern is however similar, with 7% saying they would have shopped 'somewhere else'.

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Key Findings

27. As previously we looked at ratings for the city centre across a number of criteria. The highest scores were achieved for 'choice of restaurants/cafés' and 'pleasant atmosphere'. In all, four criteria scored 90% or higher, with three in the 80s and one in the 70s. There are some movements in scores notably the improvements in restaurants and cafés since 2011 but 'signposting' appears to be the weakest criteria once more.
28. We also looked at several ratings specifically for the five sample points.
    - **'Choice of shops**' scored 56% (very good/quite good) which was down vs. last time but back to 2011 level. St Dunstan's scored the weakest once again, with both Burgate and St Margaret's scoring poorly. King's Mile scored the highest again**.**
    - **'Safety/security'** was down vs. last time but better than 2011. St Dunstan's again scored poorest, but elsewhere results were closer to 2011 although St Peter's/High Street held up well.
    - **'Cleanliness'** also seems to have dropped slightly after the improvement seen in 2013. St Dunstan's is again the poorest scorer, but King's Mile also appears to have weakened since 2013.
    - **'Service in the shops**' also however improved overall and this appears to be something that is true across all areas.
    - Finally **'signposting'** although rating relatively weaker than other criteria does show some improvement vs. last time and oddly St Dunstan's and St Peter's/High Street score highest of the five areas.

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Key Findings

29. We also looked at the market. As before, the higher scores were achieved for 'friendly service' (76%) and 'location' (77%), but all four criteria scored below 2013 levels this time, but were above the 2011 ratings.
30. Asked how the market could be improved as an open ended question, the responses included similar themes as in 2013. There were clearly some calls for relocating the market and some did not want it there at all, but many of the comments related to the quality and quantity of the stalls, so we might conclude that respondents wanted to see ‘more variety’ and ‘better quality products’ on ‘more stalls’.
31. Our overall satisfaction score was 94% (almost identical to both 2013 and 2011) but the poorest area by far was St Dunstan’s (83%).
32. The desire for changes in the retail mix shows little change across the three Spring surveys, having said this however 2015 appears closer to 2011 than 2013. Amongst those who would like to see changes the most common theme’ – within other changes was ‘more independents.
33. Service-related changes showed some subtle changes compared to previous years. The strongest demand was again for 'cheaper parking', but this was weaker than previous years. Next came the desire for 'more entertainment' and 'late night opening' but again the demand appeared relatively weaker. The ‘Other’ responses did not generate any clear themes.

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Key Findings

34. We added new questions in 2015 about My Canterbury. Awareness of MyCanterbury was 26% overall, and this ranged from 32% in St Peter's/High Street down to 17% in Burgate.
35. For those aware of My Canterbury the most common methods of communication were from 'someone I know' (25%), ahead of 'social media' (19%), and 'shop window stickers (15%), the same proportion (15%) were aware but could not recall the source.

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Gender & Age profiles

(n = all respondents)

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

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Social Grade profile and Average Party Size

(n = all respondents)

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

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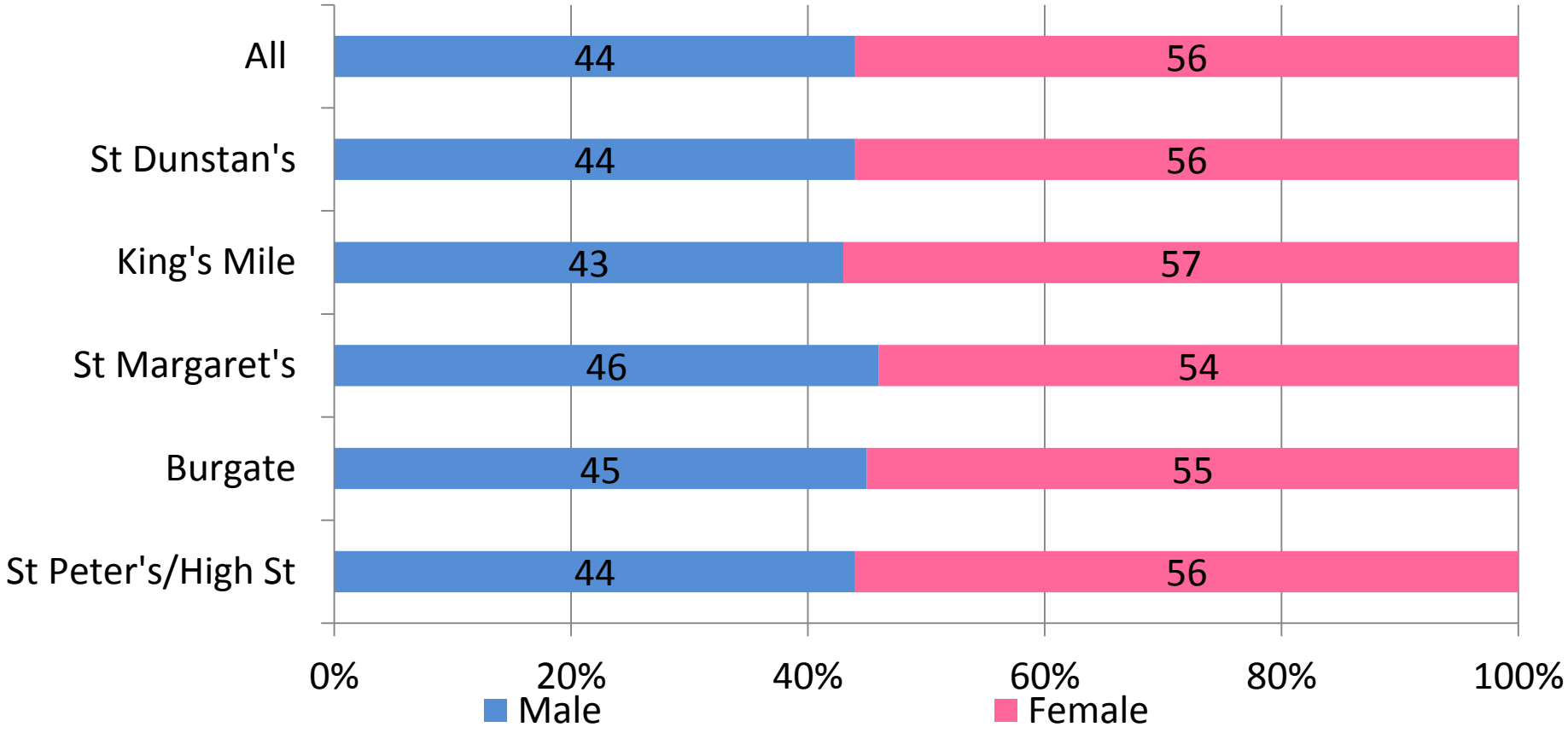
Gender profile (Spring 15)

Respondents by gender

(n = all respondents)



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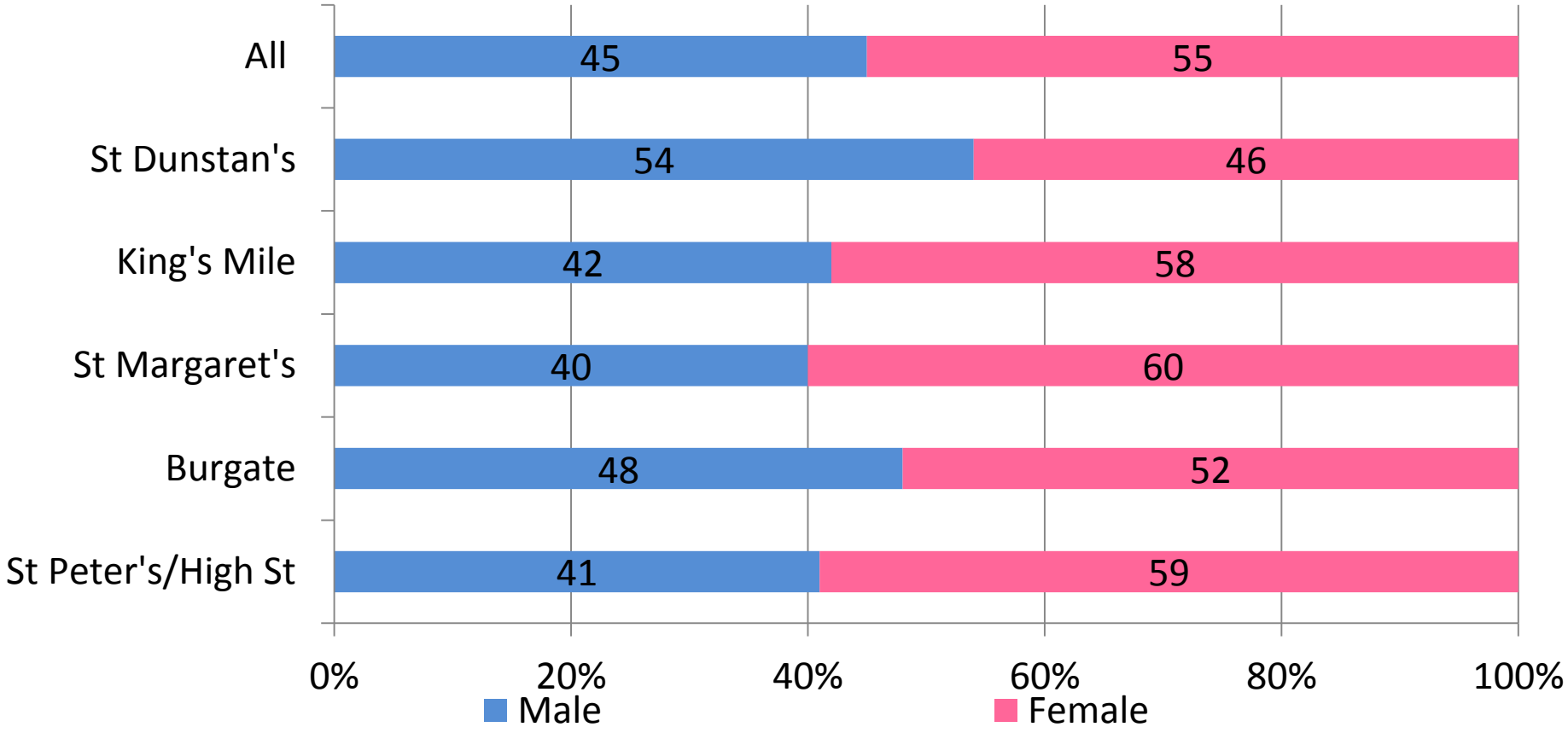
Gender profile (Spring 13)

Respondents by gender

(n = all respondents)



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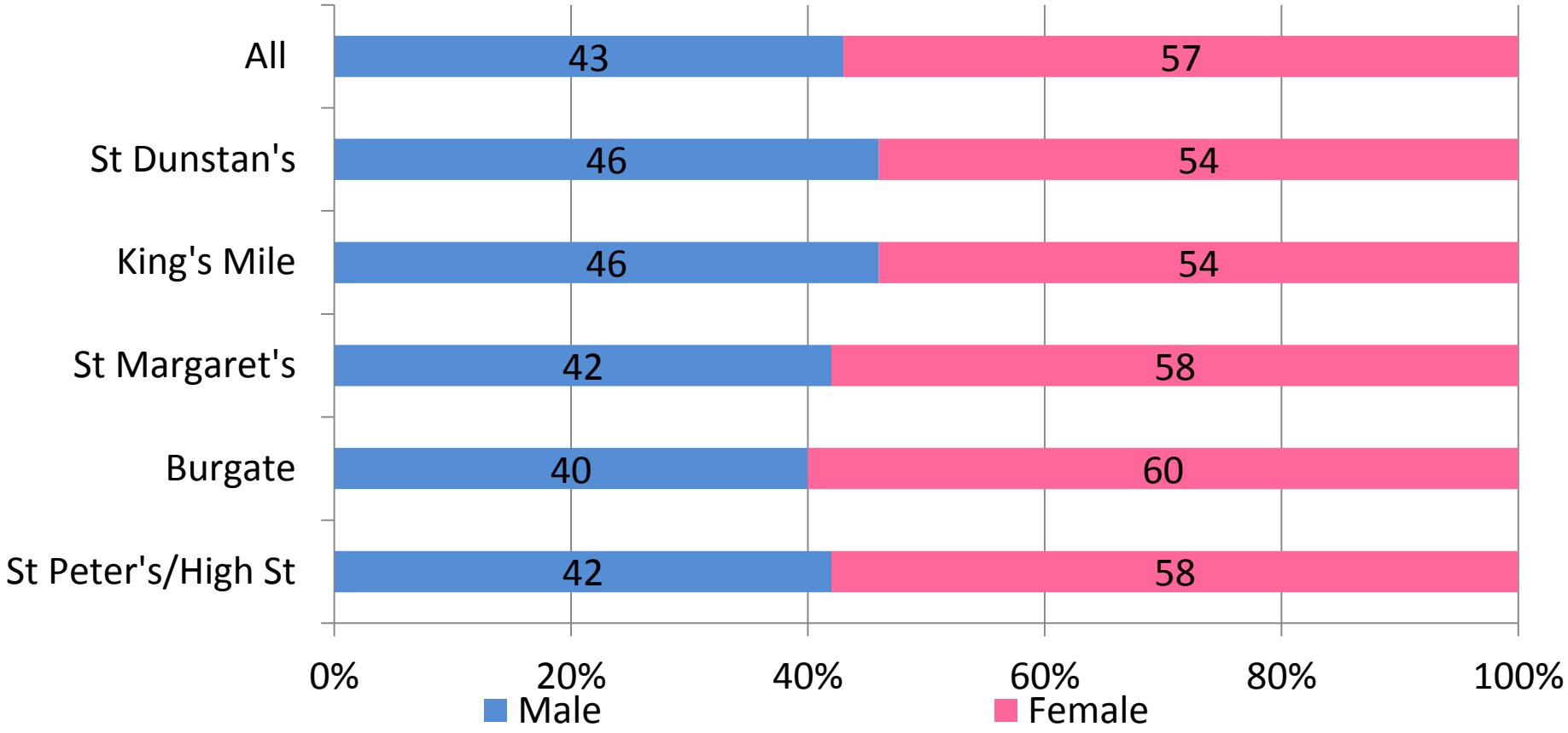
Gender profile (Spring 11)

Respondents by gender

(n = all respondents)



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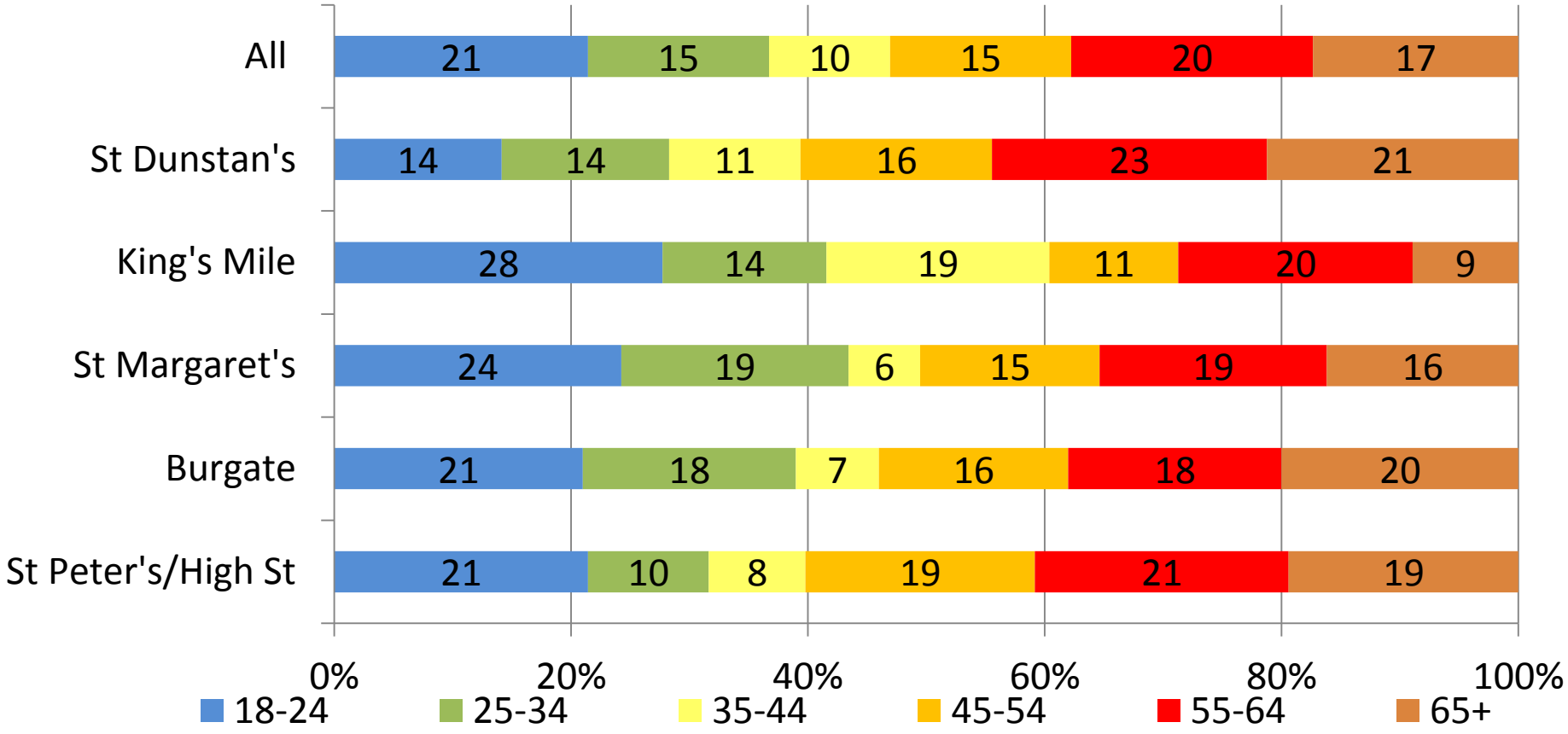
Age profile (Spring 15)

Please tell me your age?

(n = all respondents)



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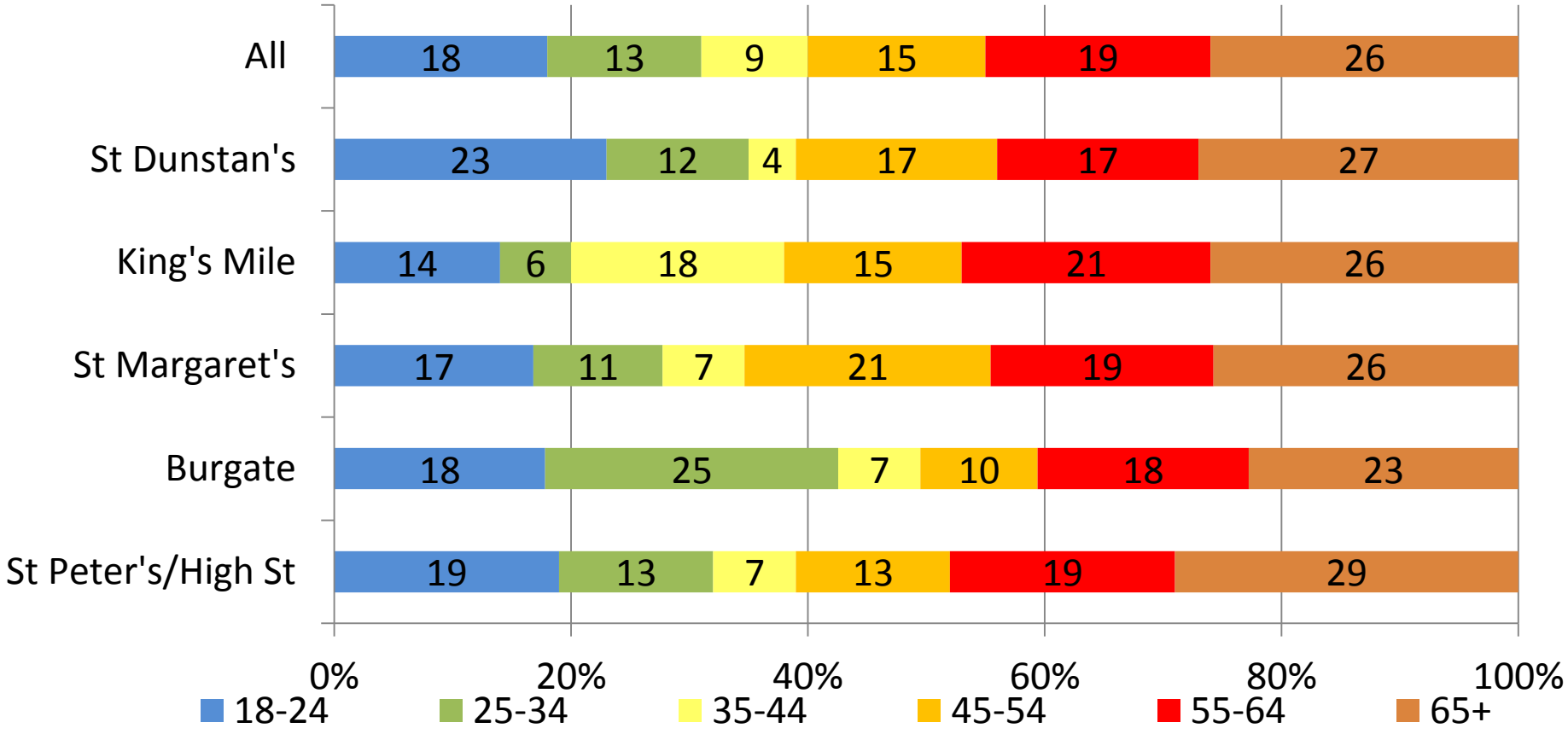
Age profile (Spring 13)

Please tell me your age?

(n = all respondents)



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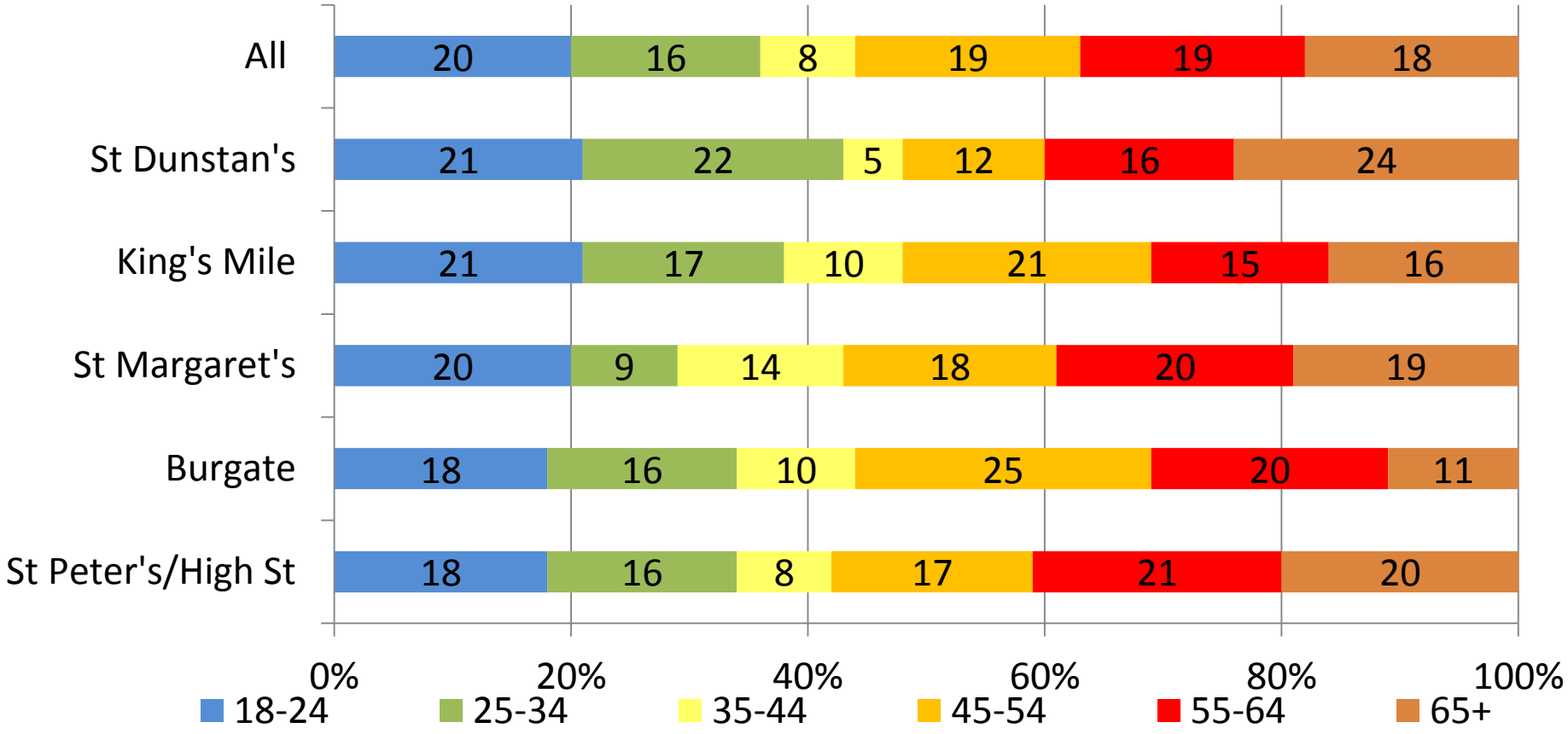
Age profile (Spring 11)

Please tell me your age?

(n = all respondents)



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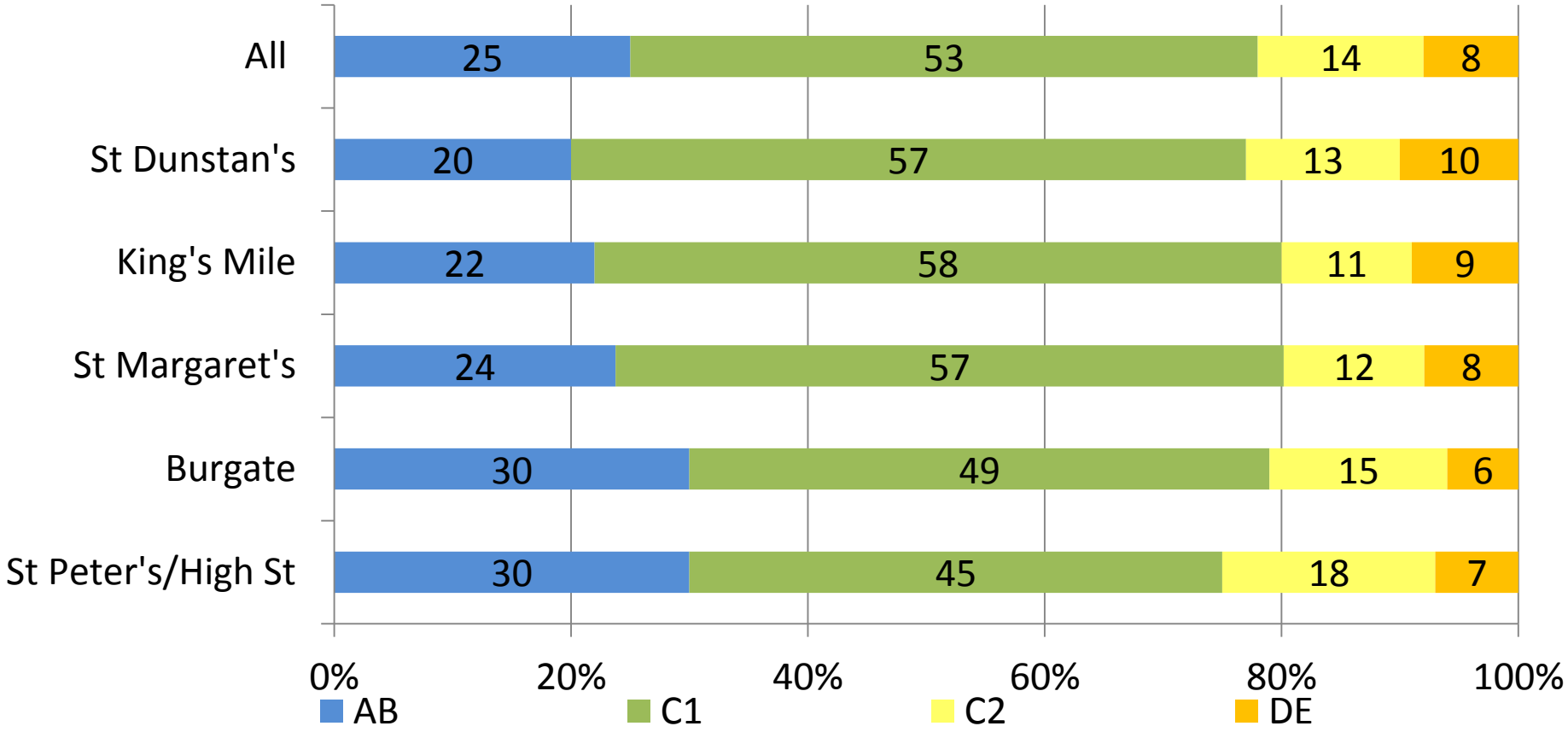
Social grade (Spring 15)

Respondents by SEG profile

(n = all respondents)



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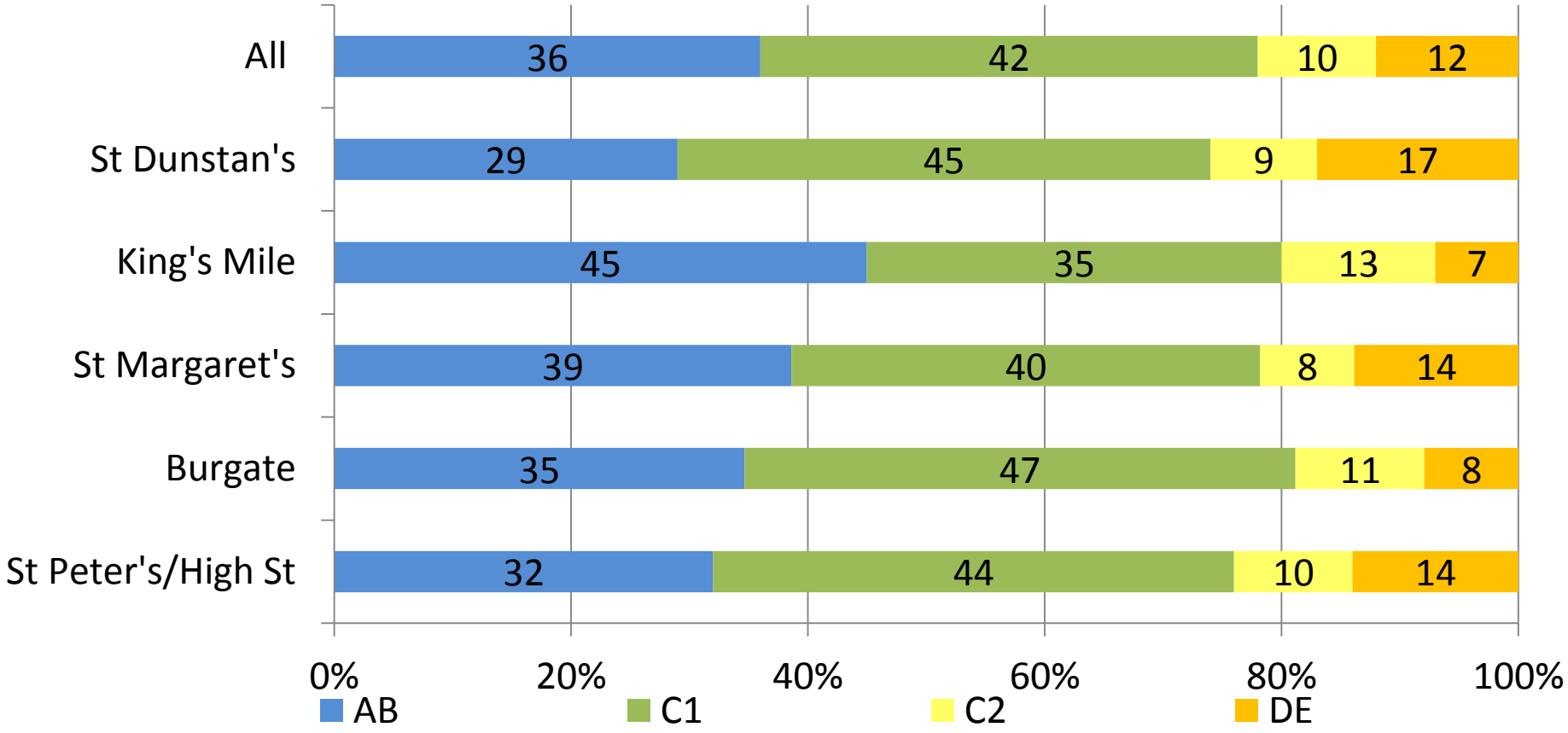
Social grade (Spring 13)

Respondents by SEG profile

(n = all respondents)



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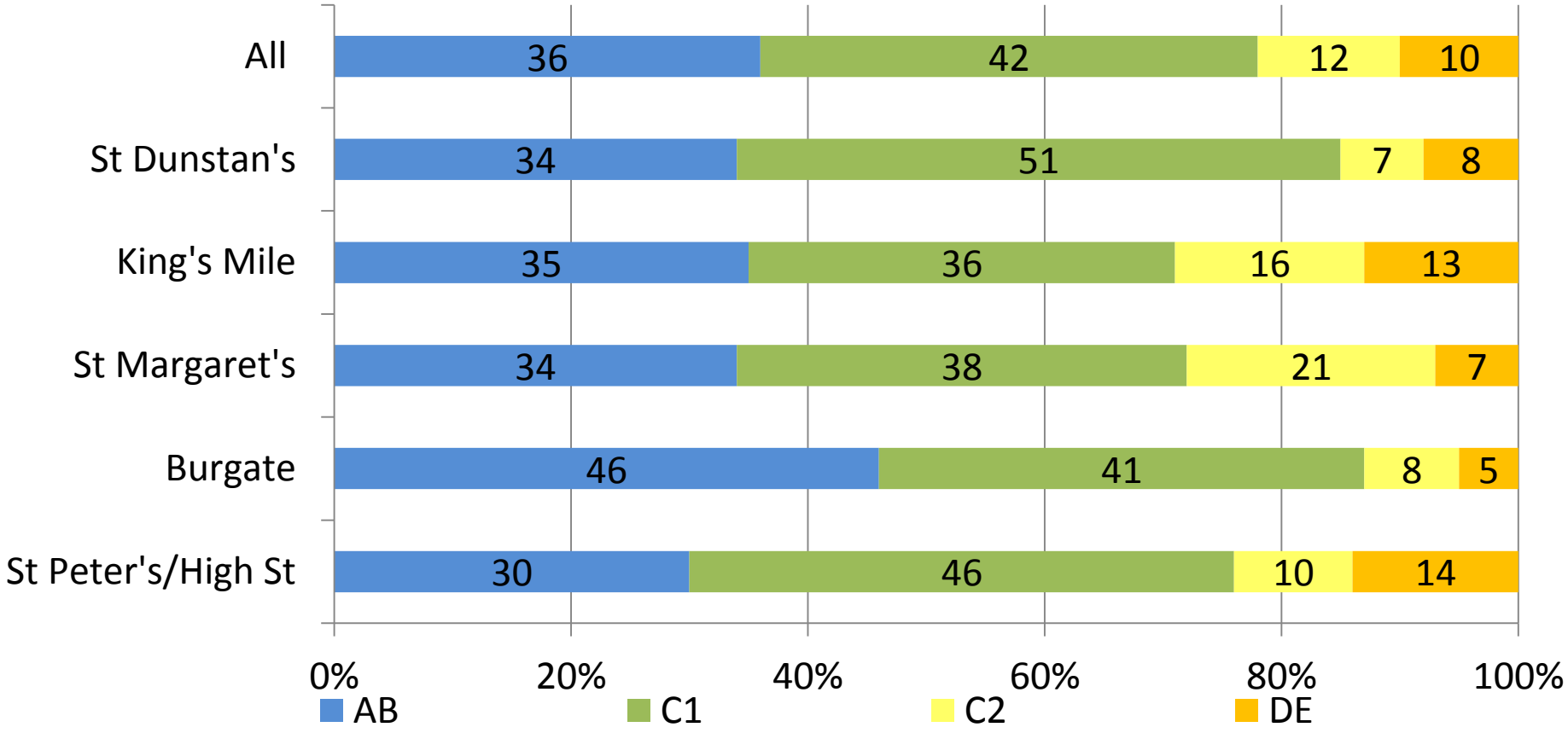
Social grade (Spring 11)

Respondents by SEG profile

(n = all respondents)



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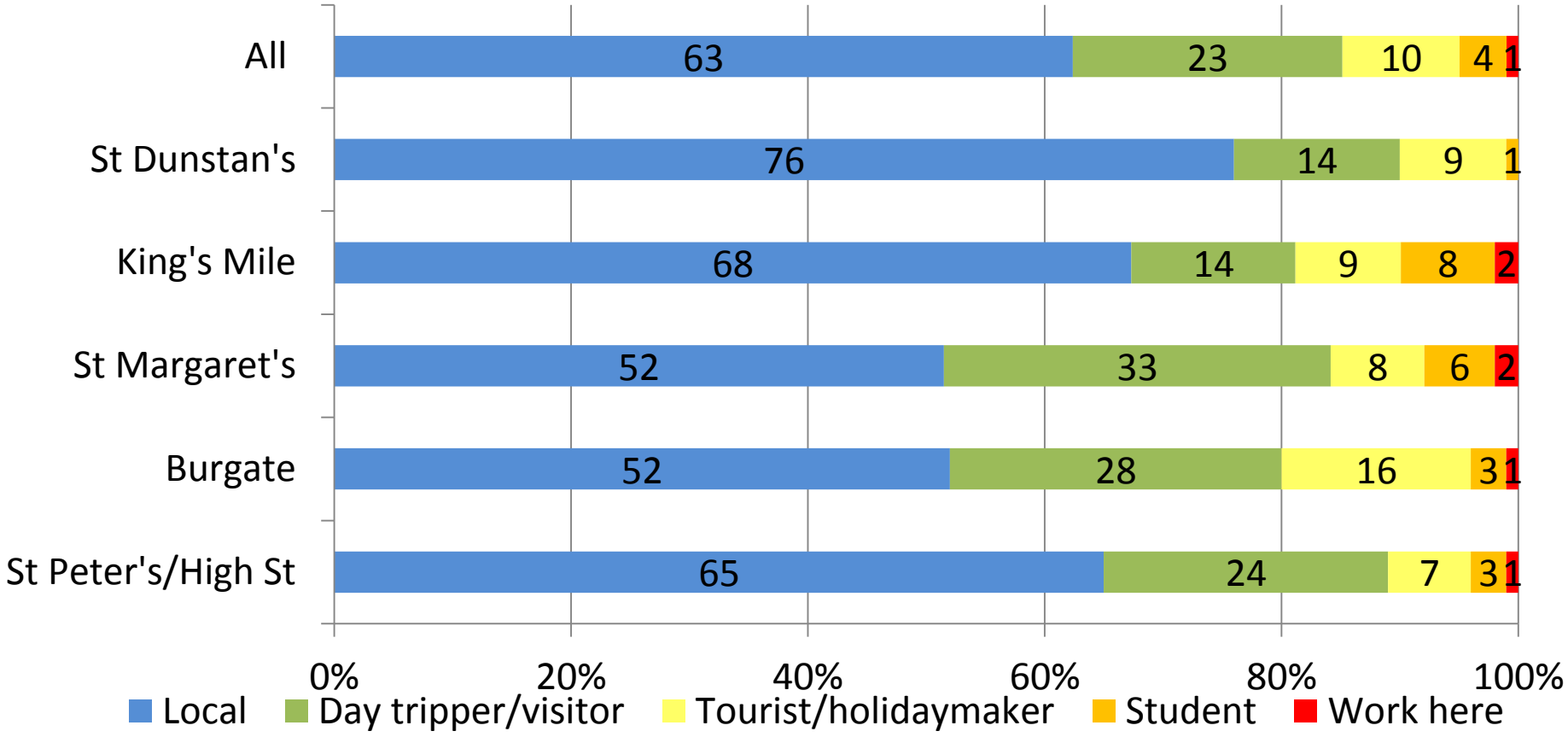
Respondent Description (Spring 15)

Which of these best describes you?

(n = all respondents)



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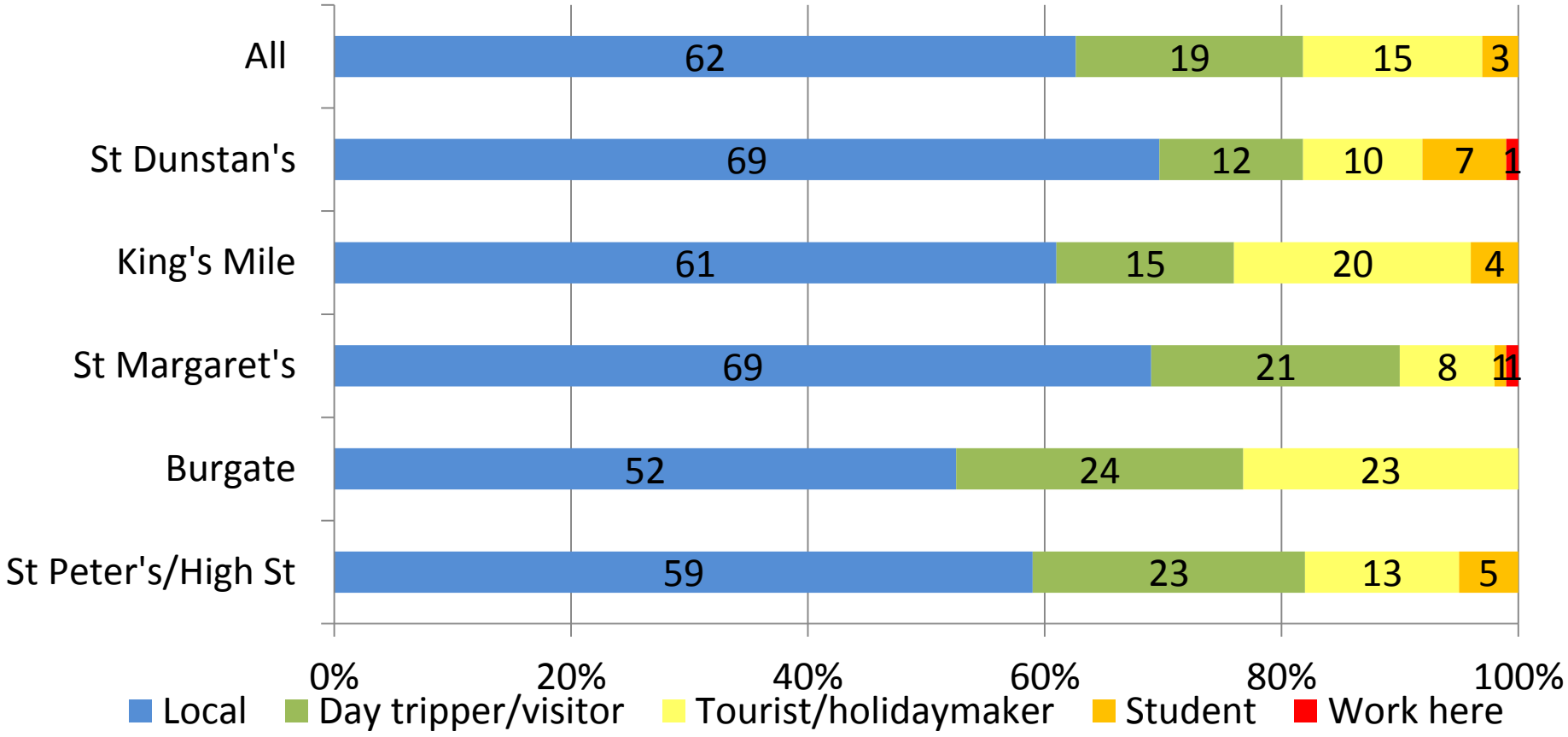
Respondent Description (Spring 13)

Which of these best describes you?

(n = all respondents)



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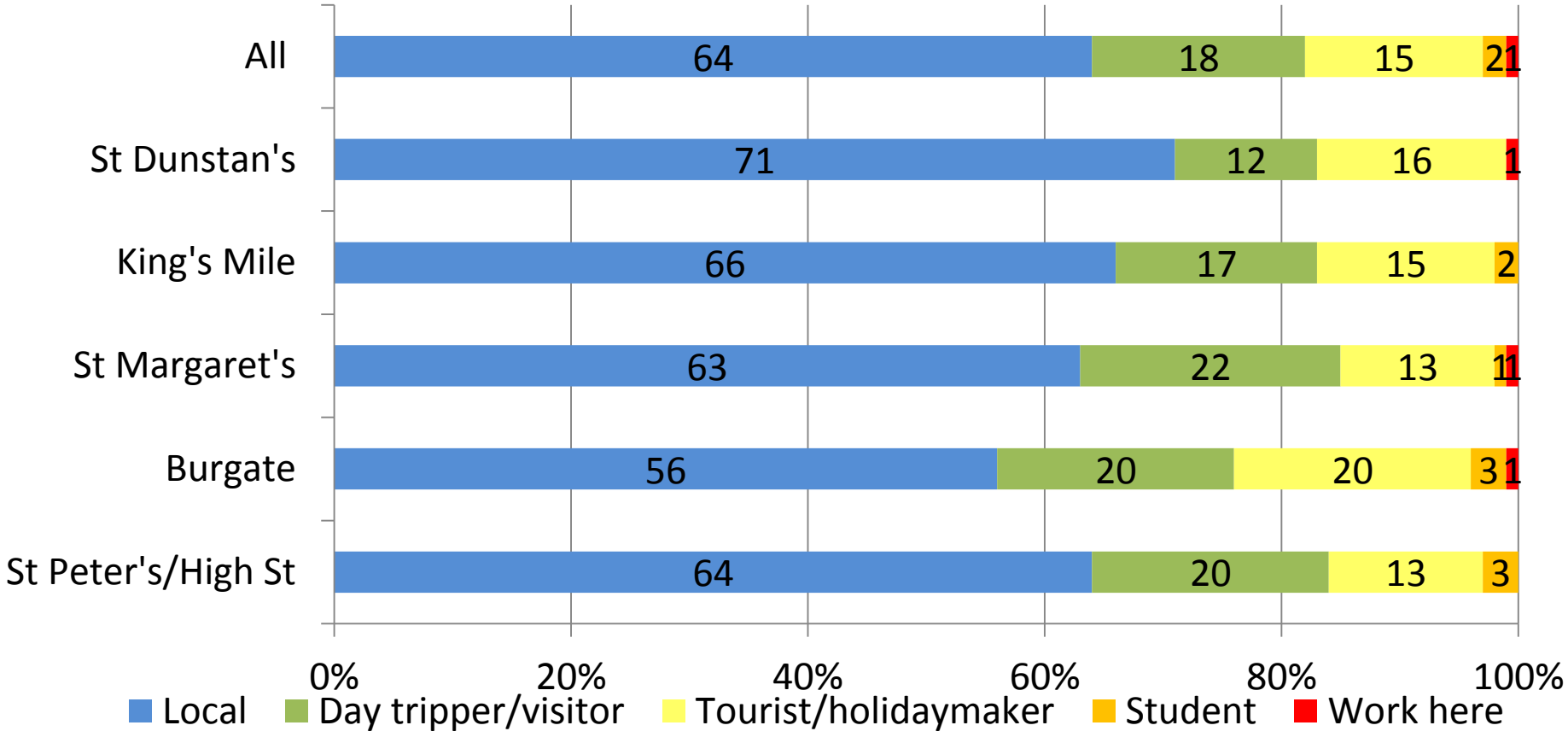
Respondent Description (Spring 11)

Which of these best describes you?

(n = all respondents)



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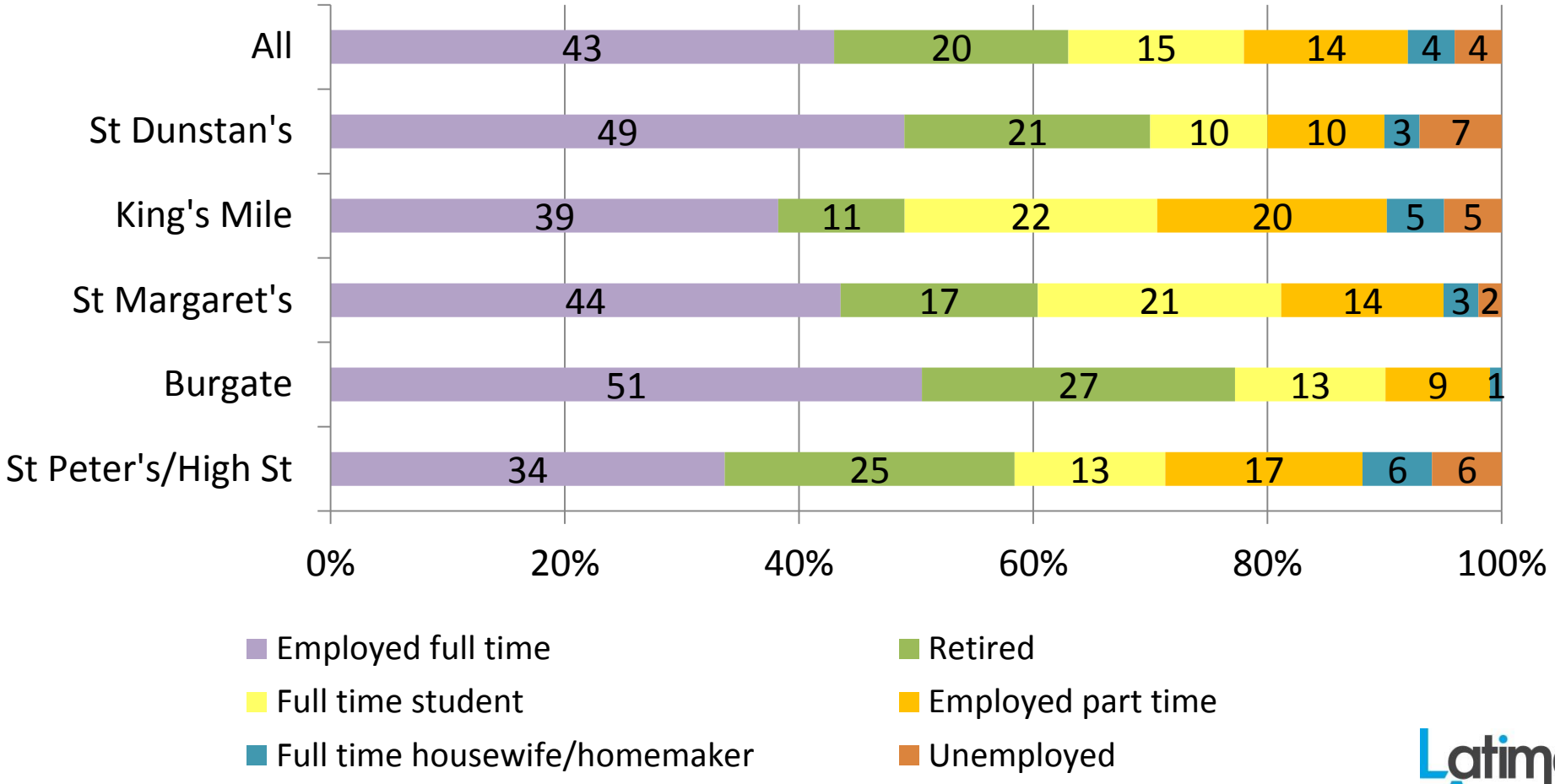
Personal Description (Spring 15)

Which of these best describes you?

(n = all respondents)



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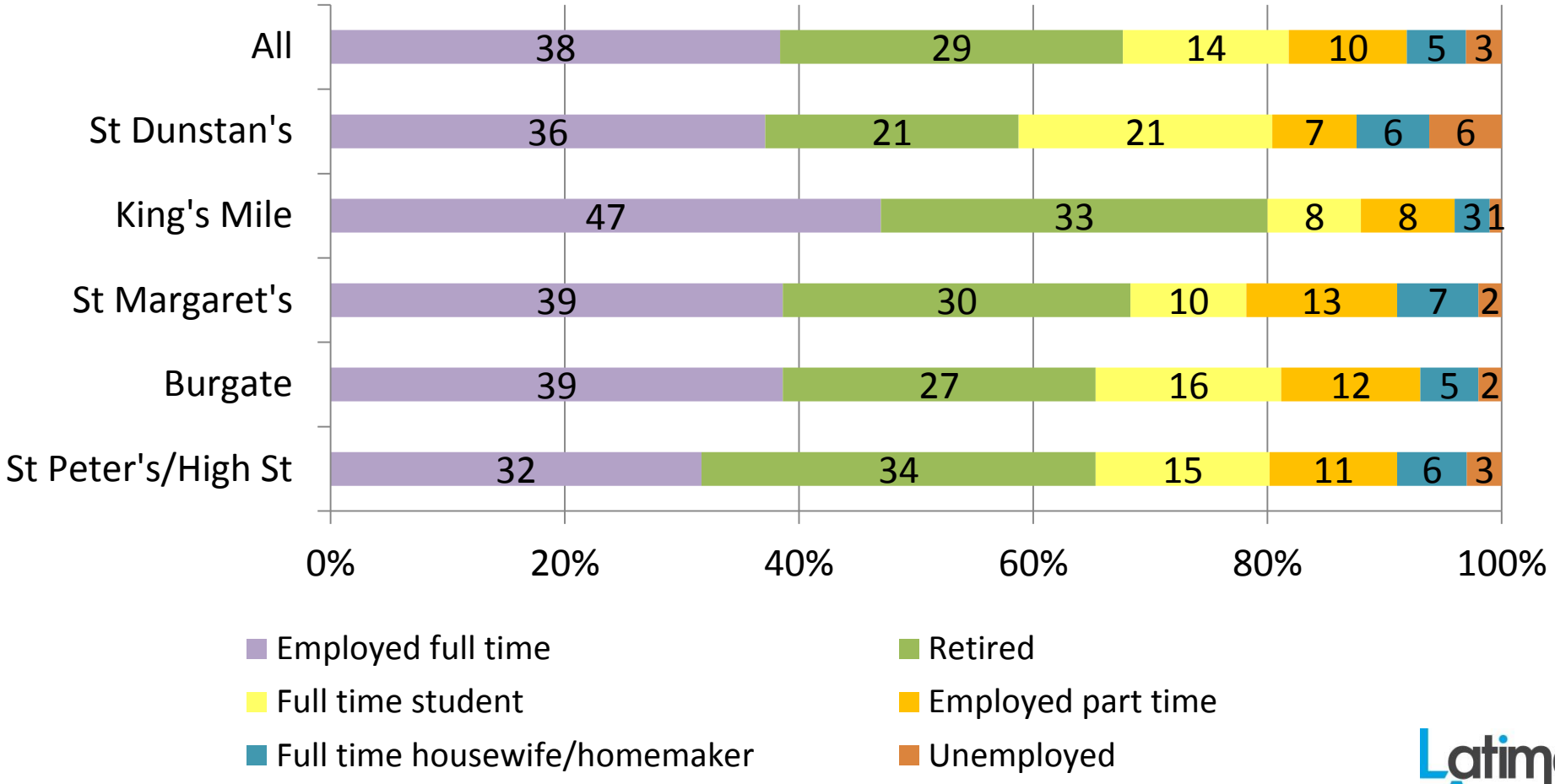
Personal Description (Spring 13)

Which of these best describes you?

(n = all respondents)



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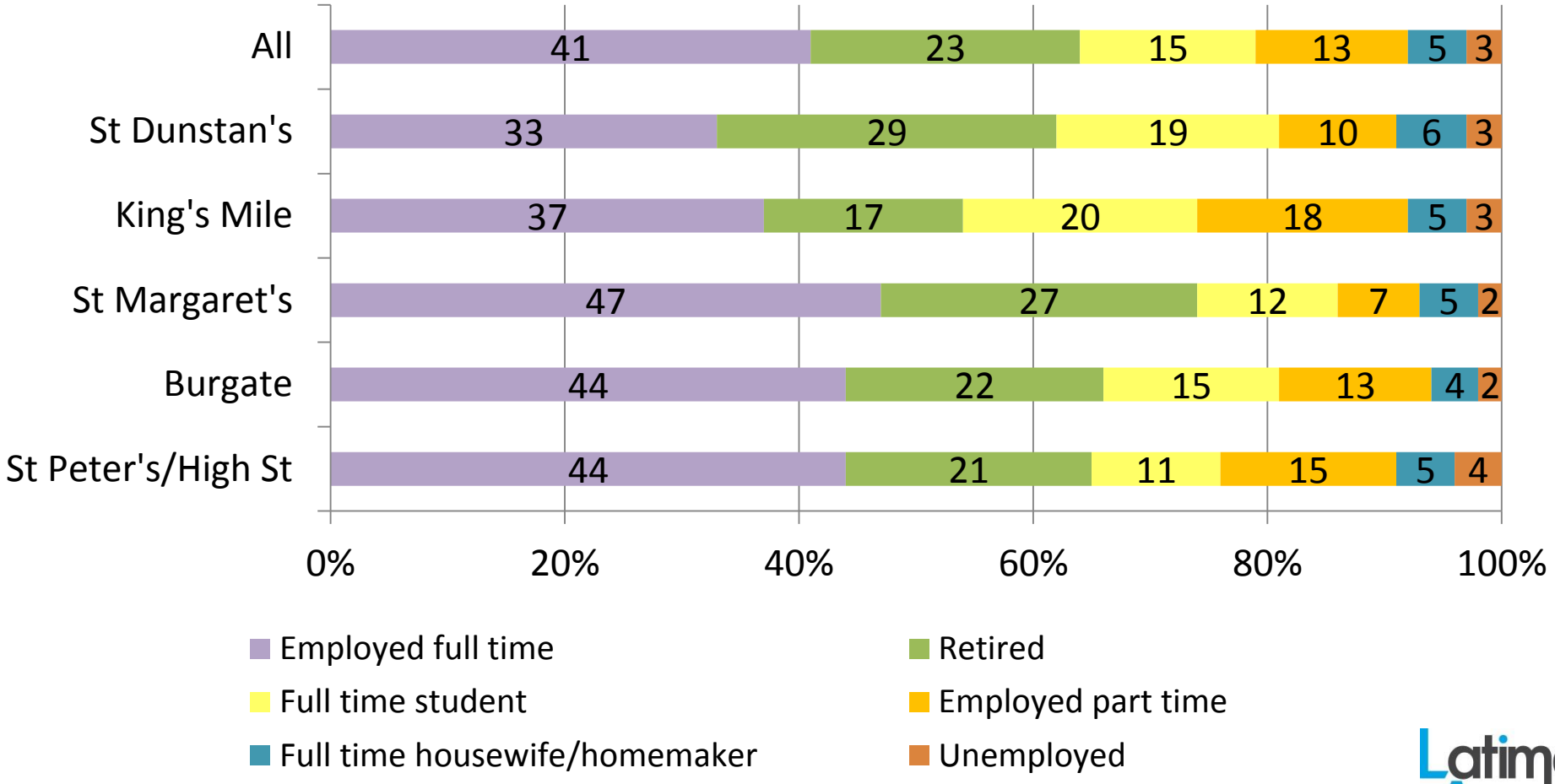
Personal Description (Spring 11)

Which of these best describes you?

(n = all respondents)



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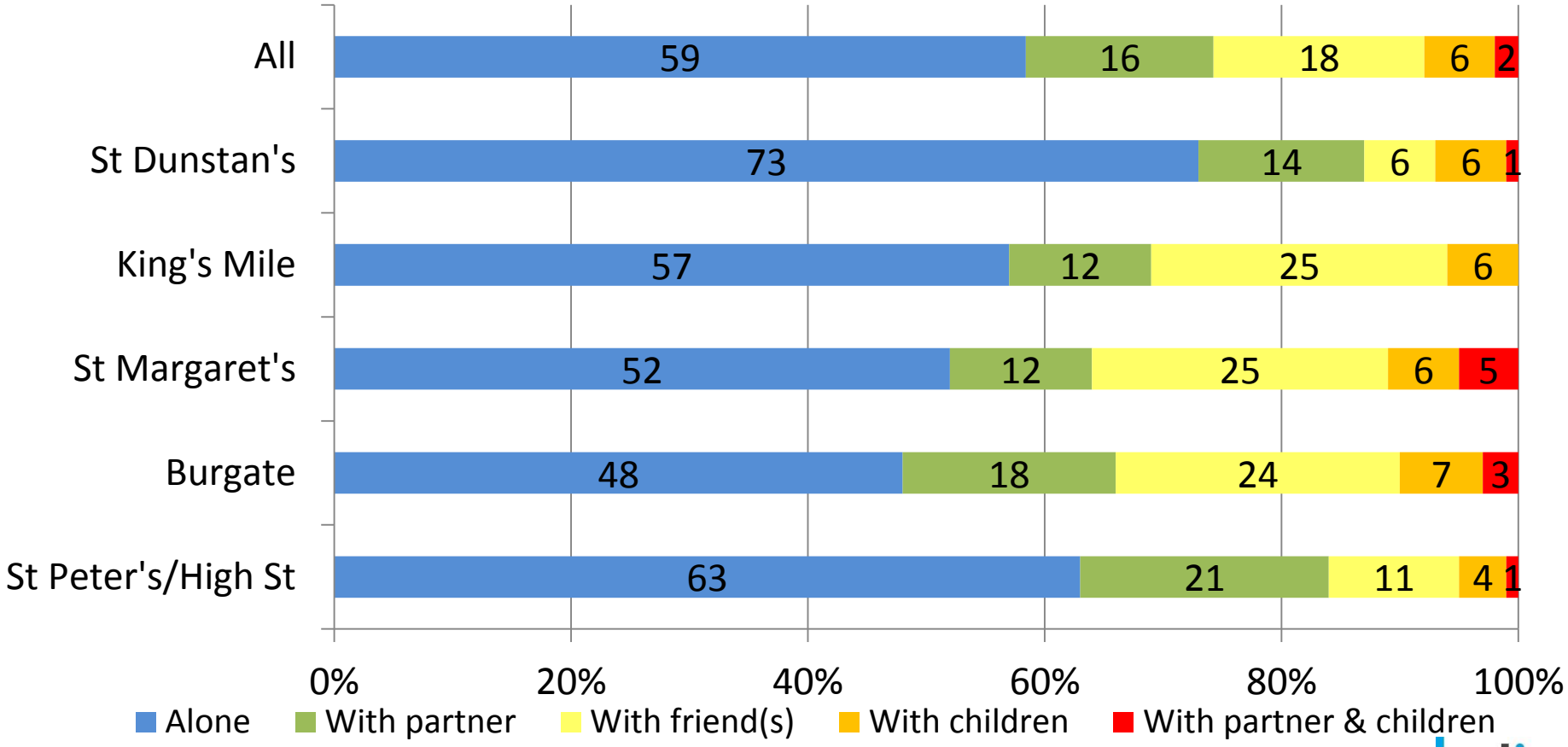
Party Description (Spring 15)

Who are you with today?

(n = all respondents)



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Party Description (Spring 13)

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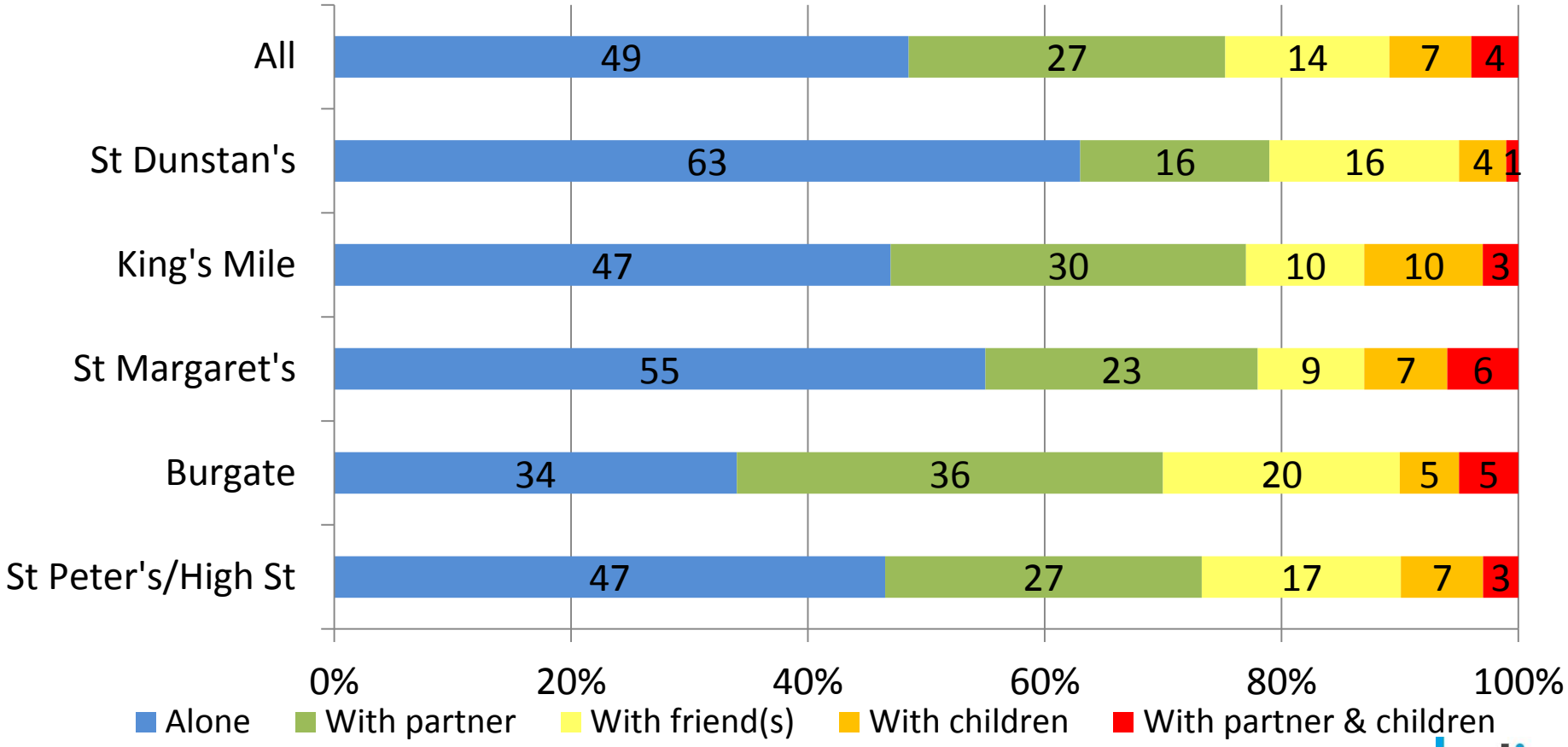
(n = all respondents)



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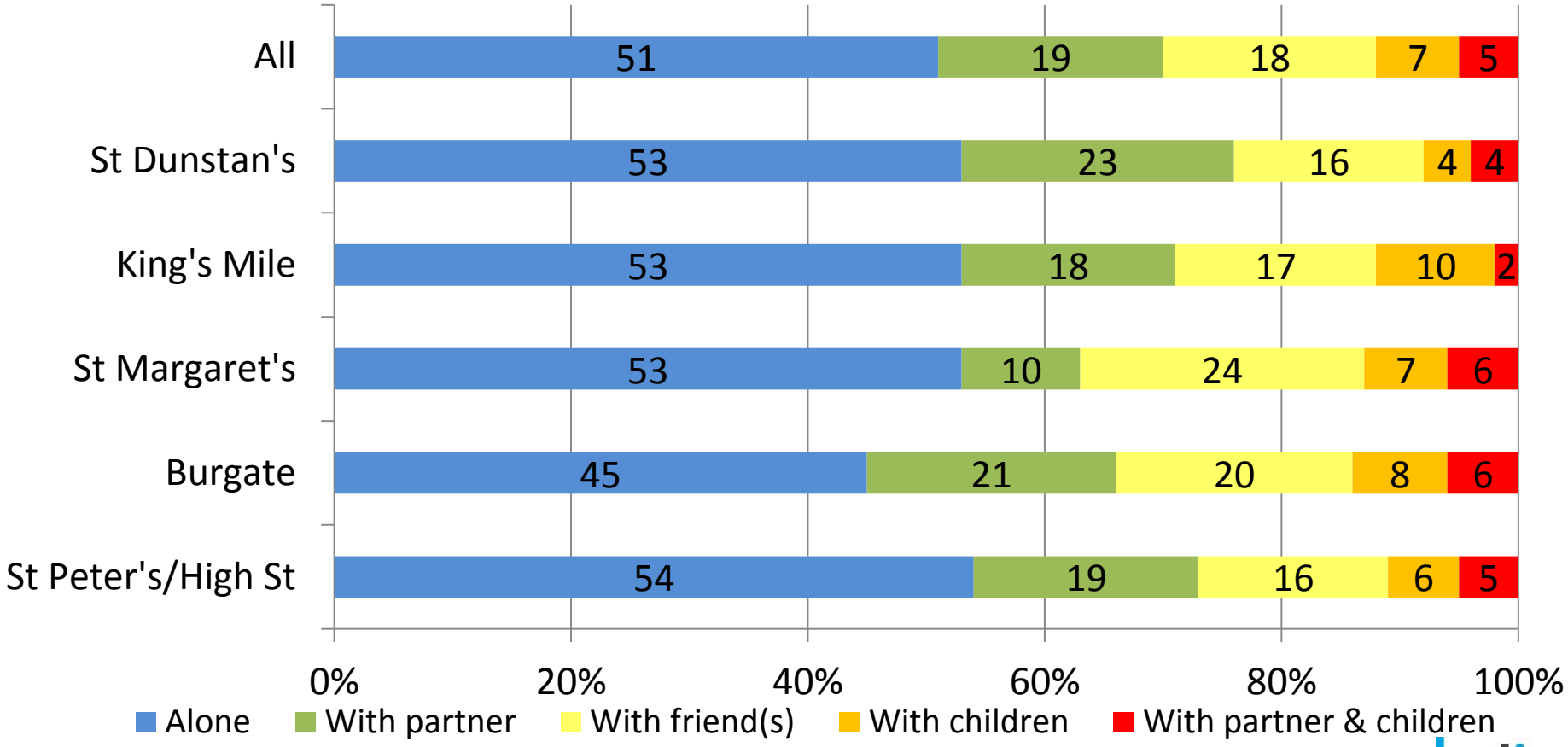
Party Description (Spring 11)

Who are you with today?

(n = all respondents)



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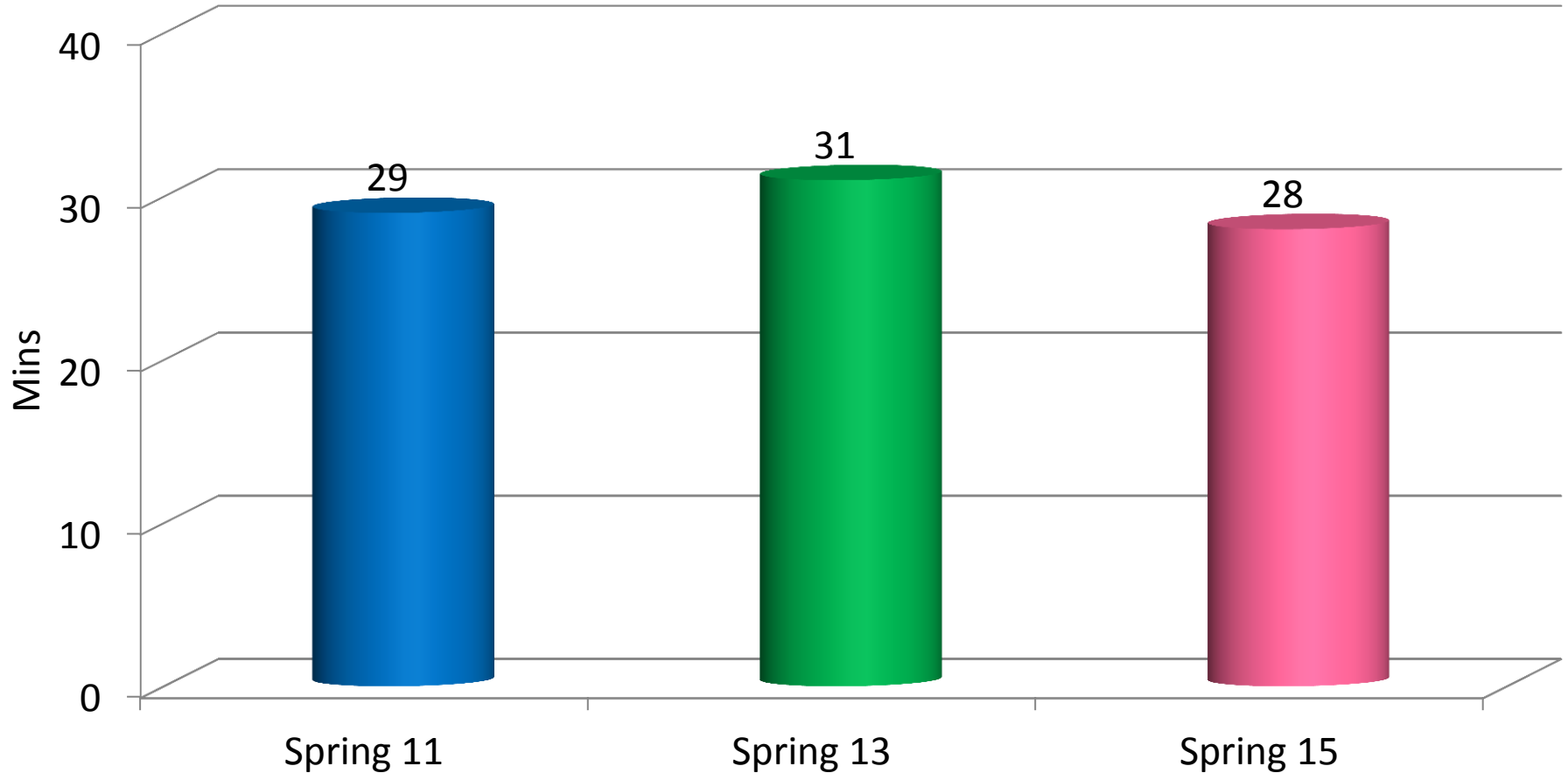
Travel Time

How long did it take you to travel here today?

(n = all respondents)



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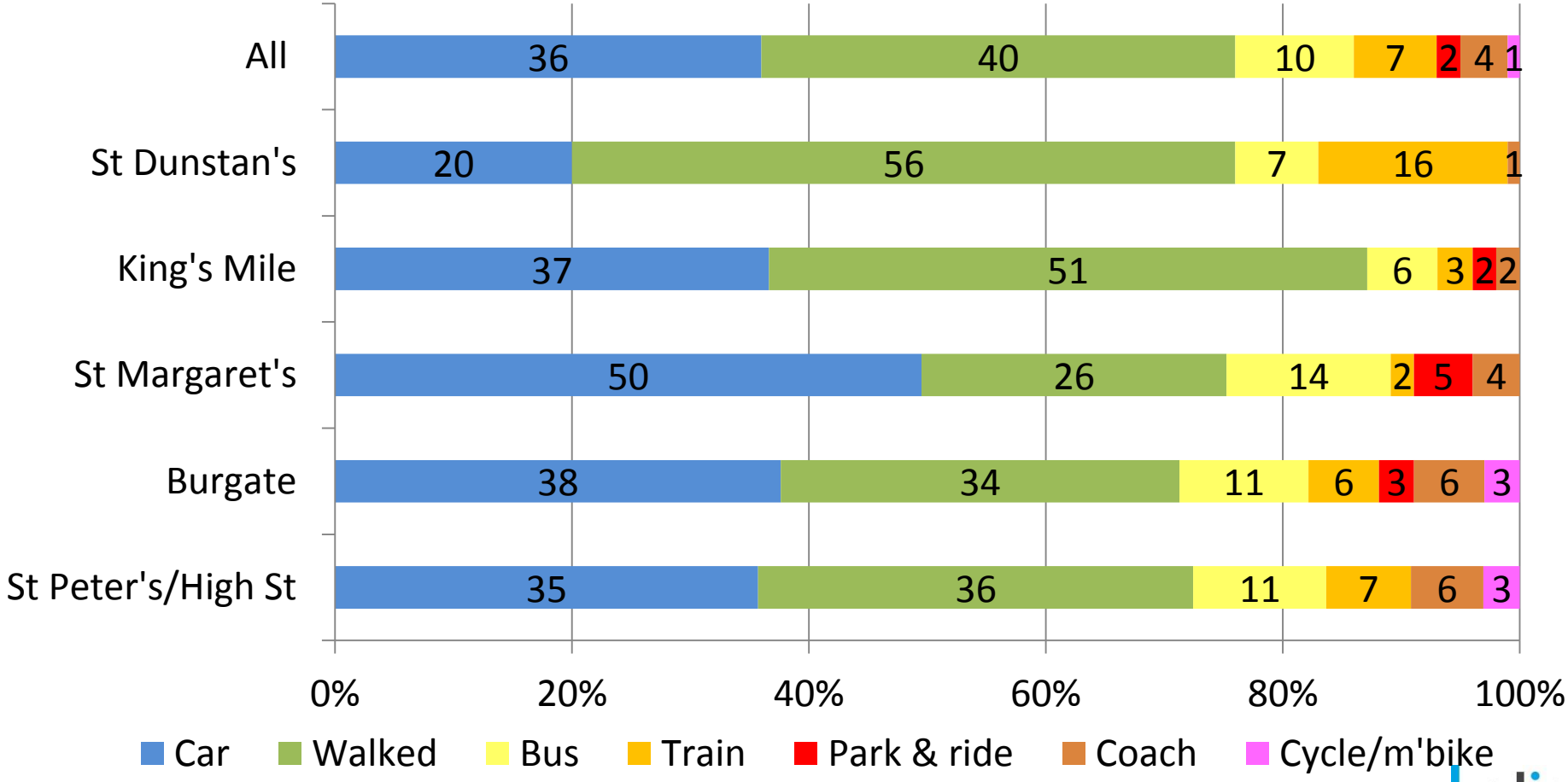
Travel Mode (Spring 15)

How did you travel here today?

(n = all respondents)



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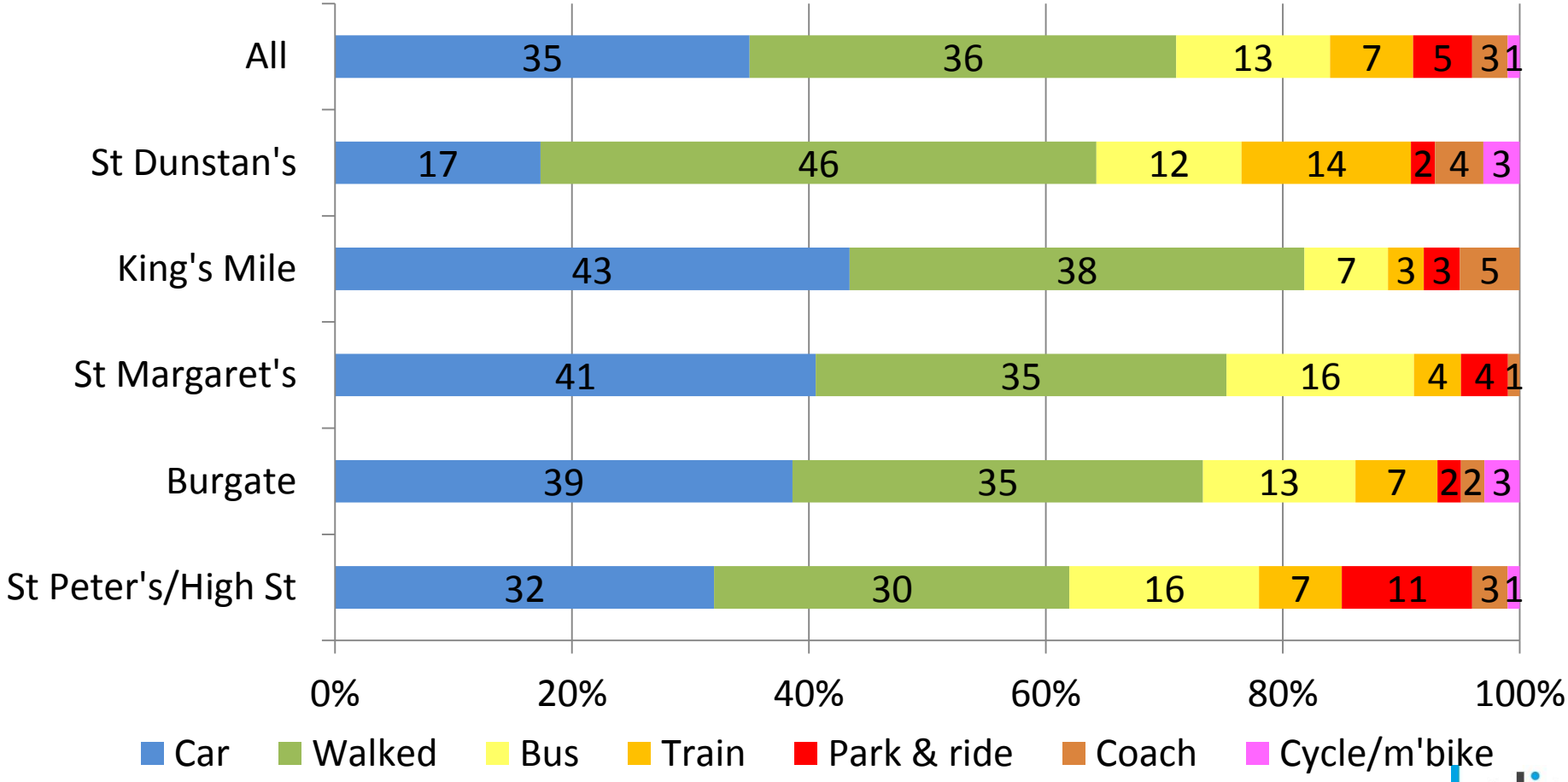
Travel Mode (Spring 13)

How did you travel here today?

(n = all respondents)



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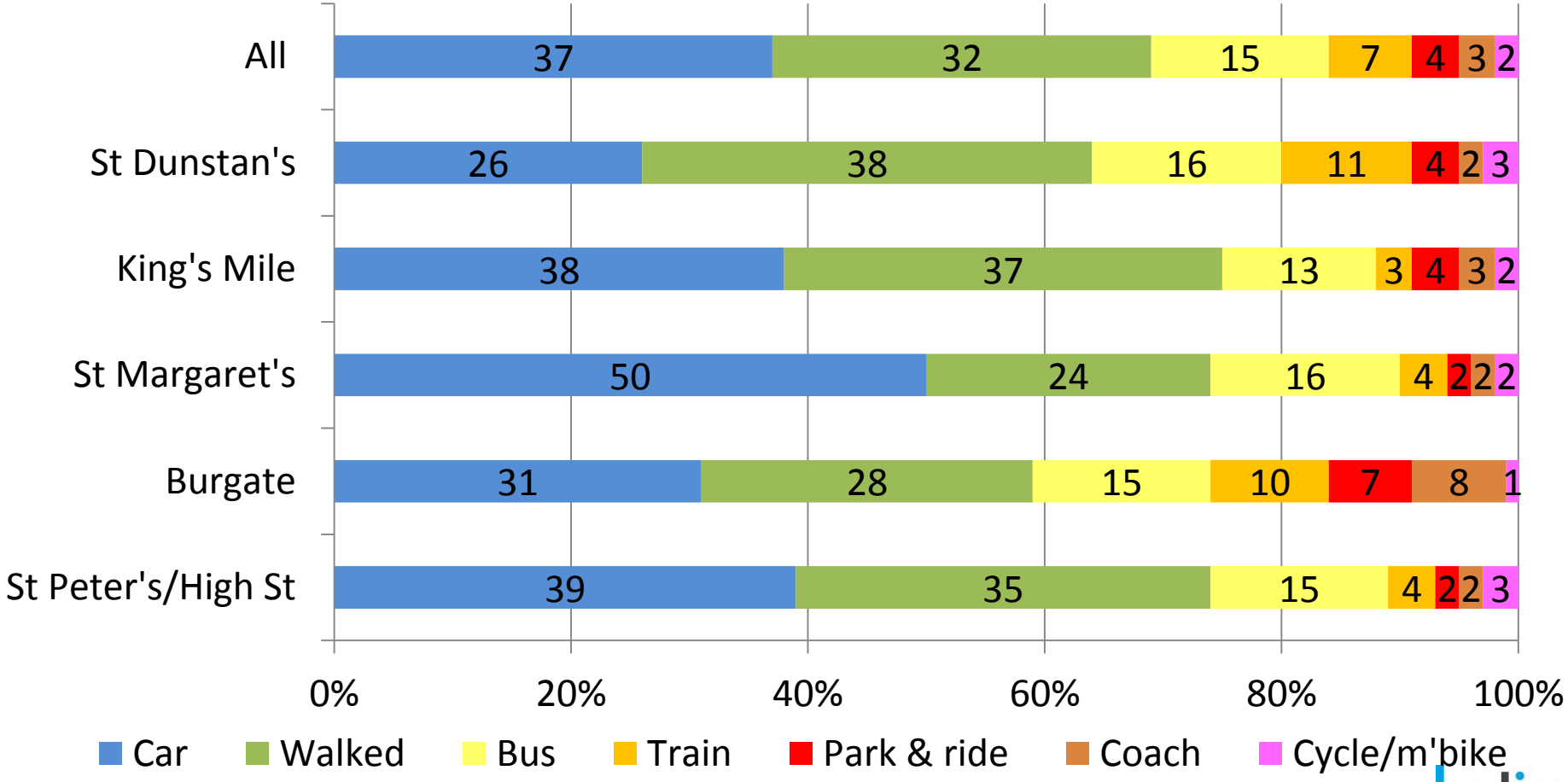
Travel Mode (Spring 11)

How did you travel here today?

(n = all respondents)



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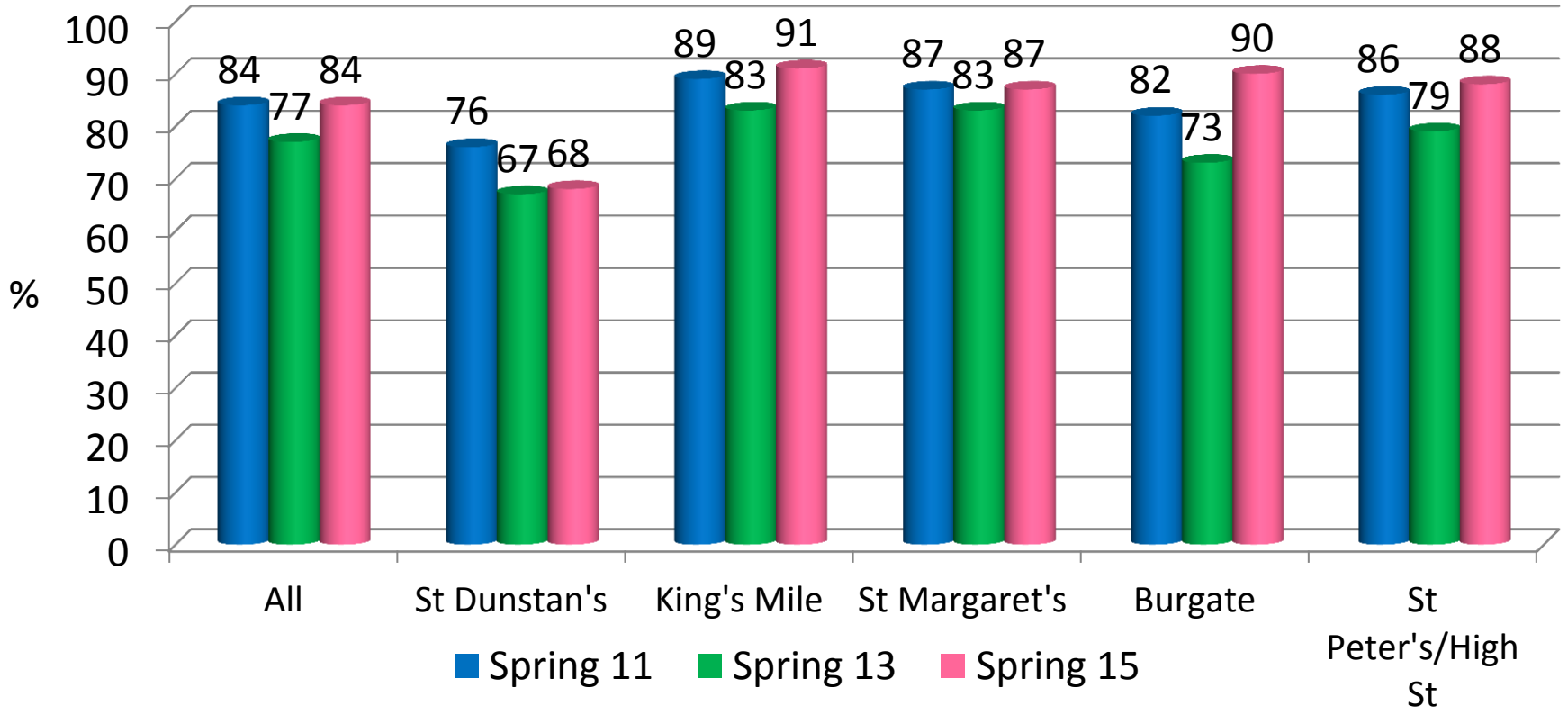
Shopping Today

Proportion shopping in Canterbury city centre today

(n = all respondents)



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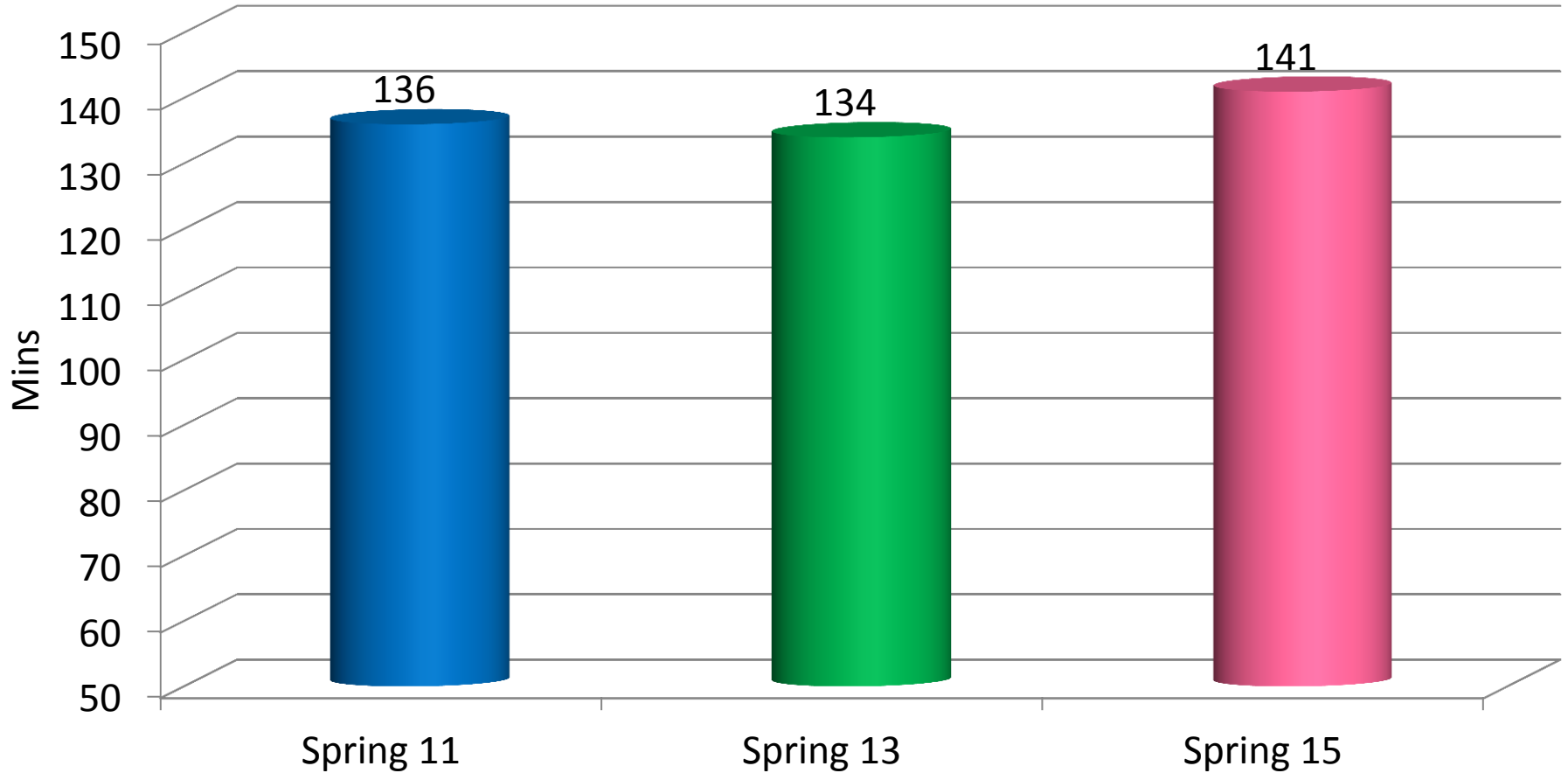
Dwell Time

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

(n = those shopping in Canterbury today)



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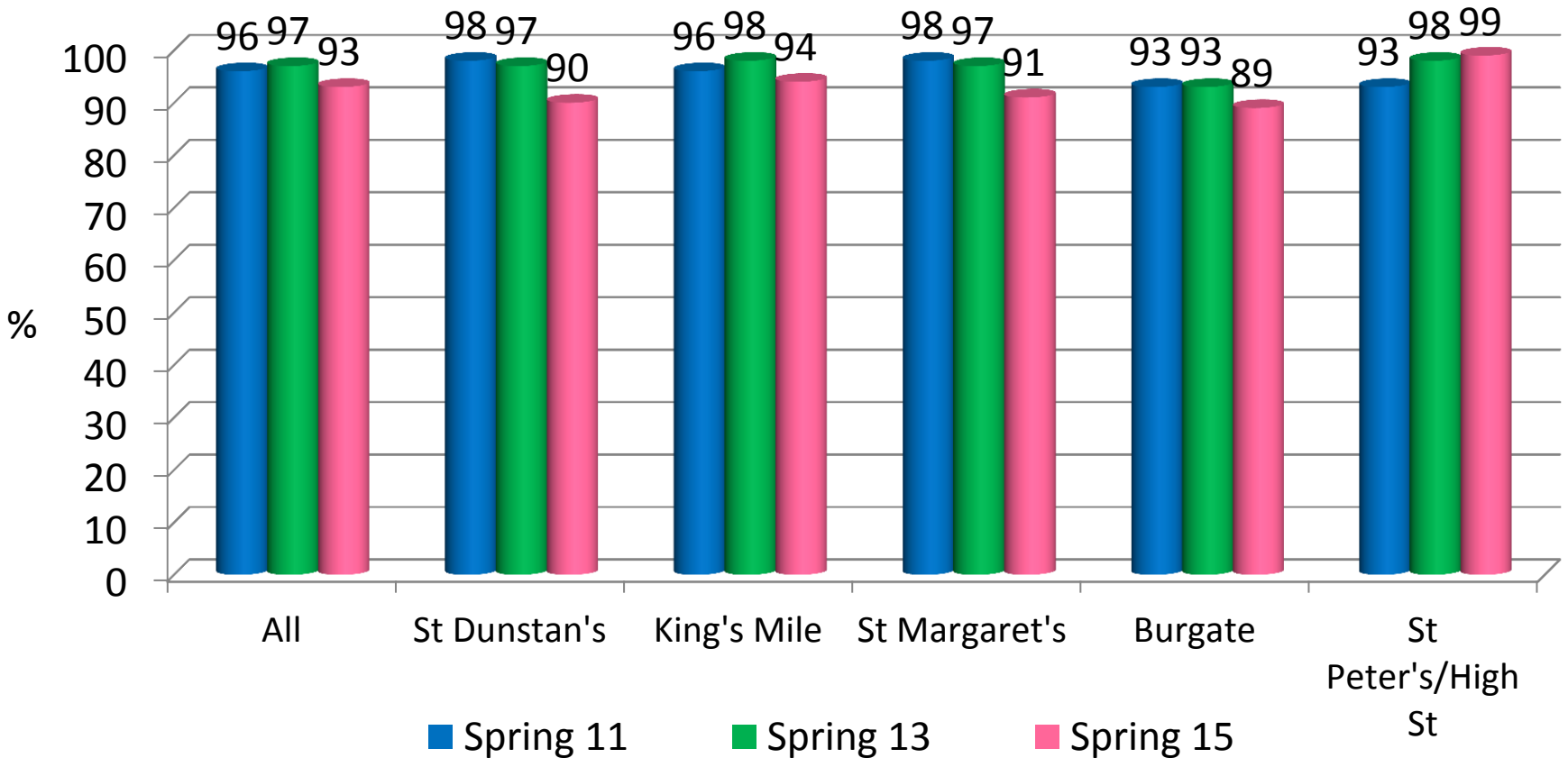
Canterbury Non-food Shoppers

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

(n = all respondents)



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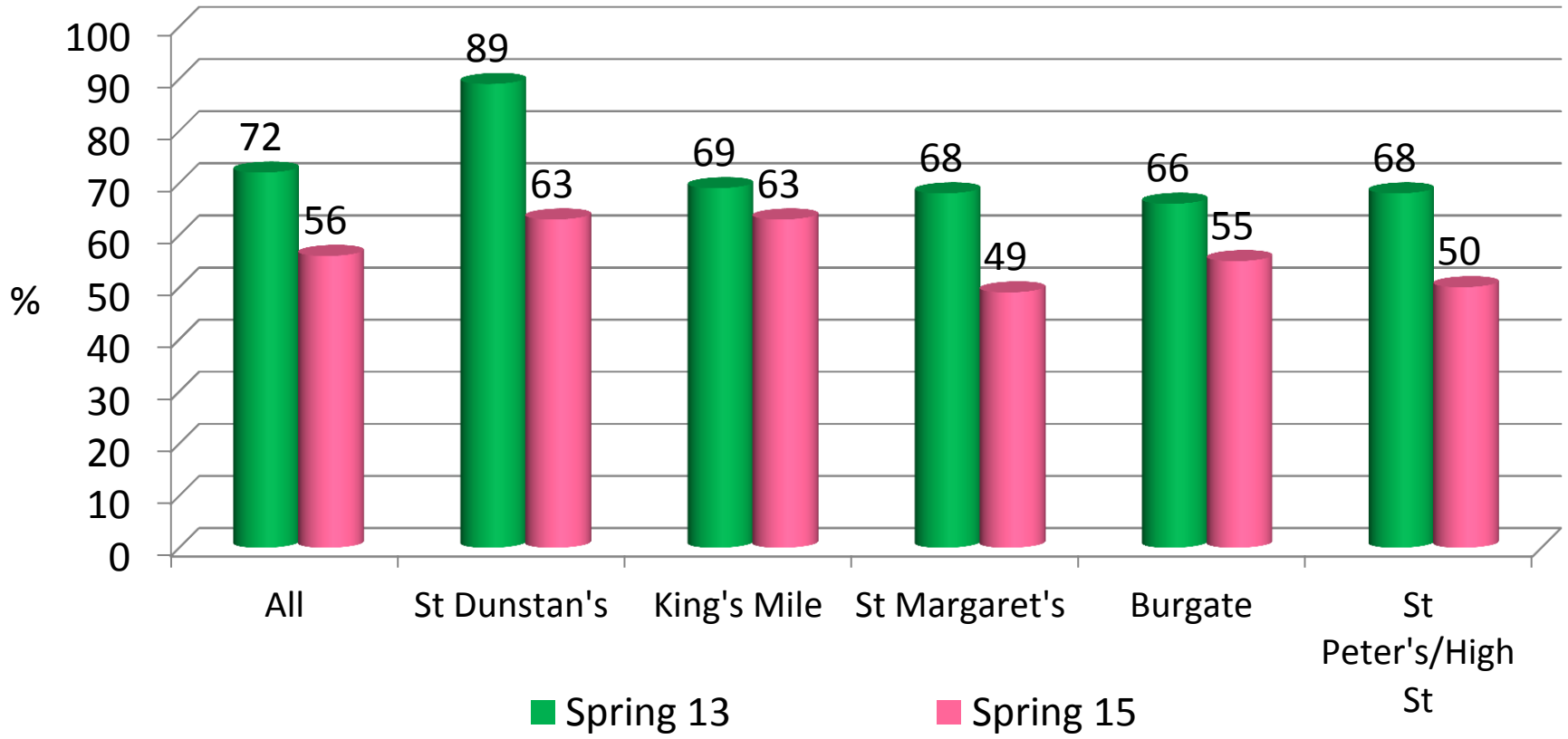
Canterbury Grocery Shoppers

Proportion who ever shop in Canterbury city centre for groceries

(n = all respondents)



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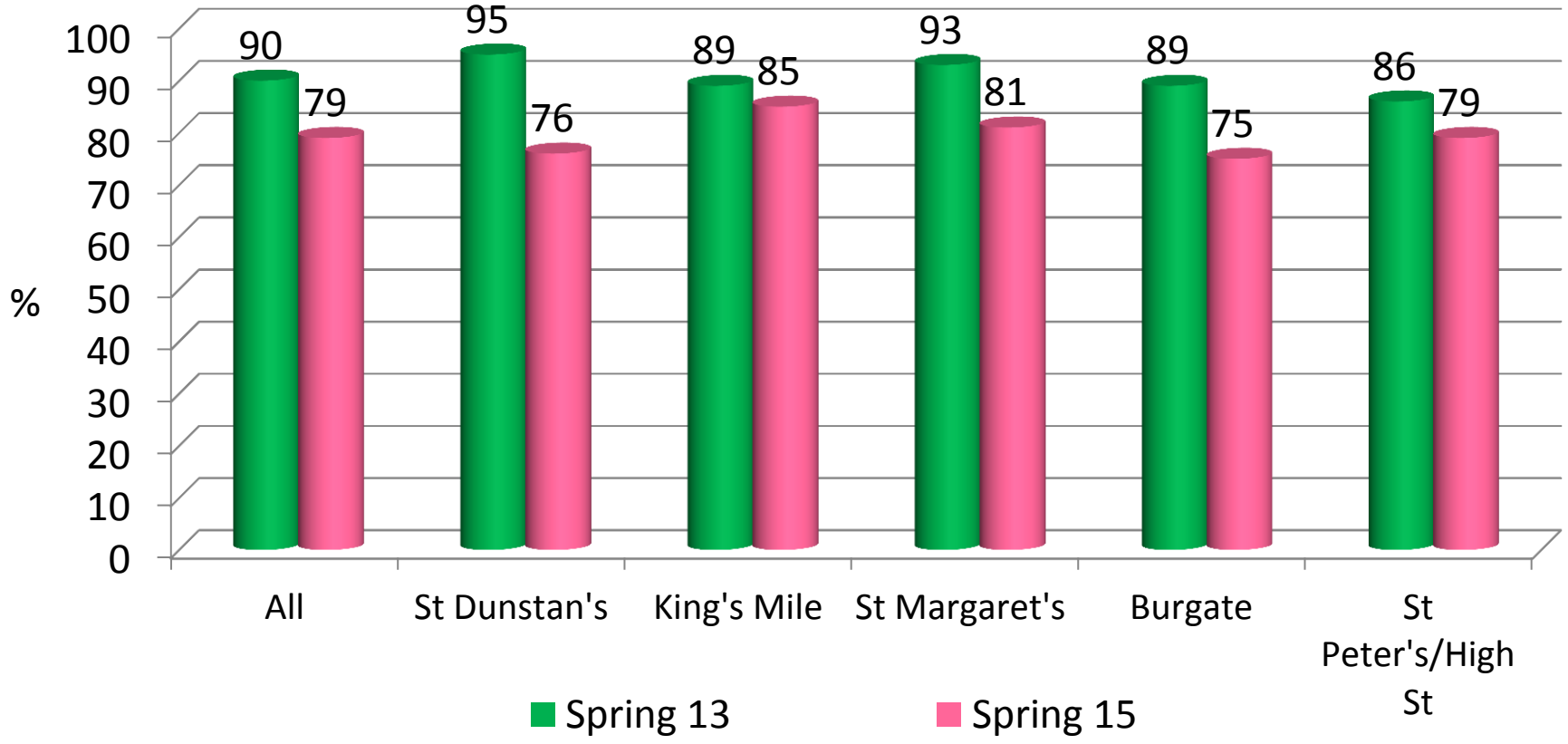
Canterbury Entertainment Visitors

Proportion who ever visit Canterbury city centre for entertainment

(n = all respondents)



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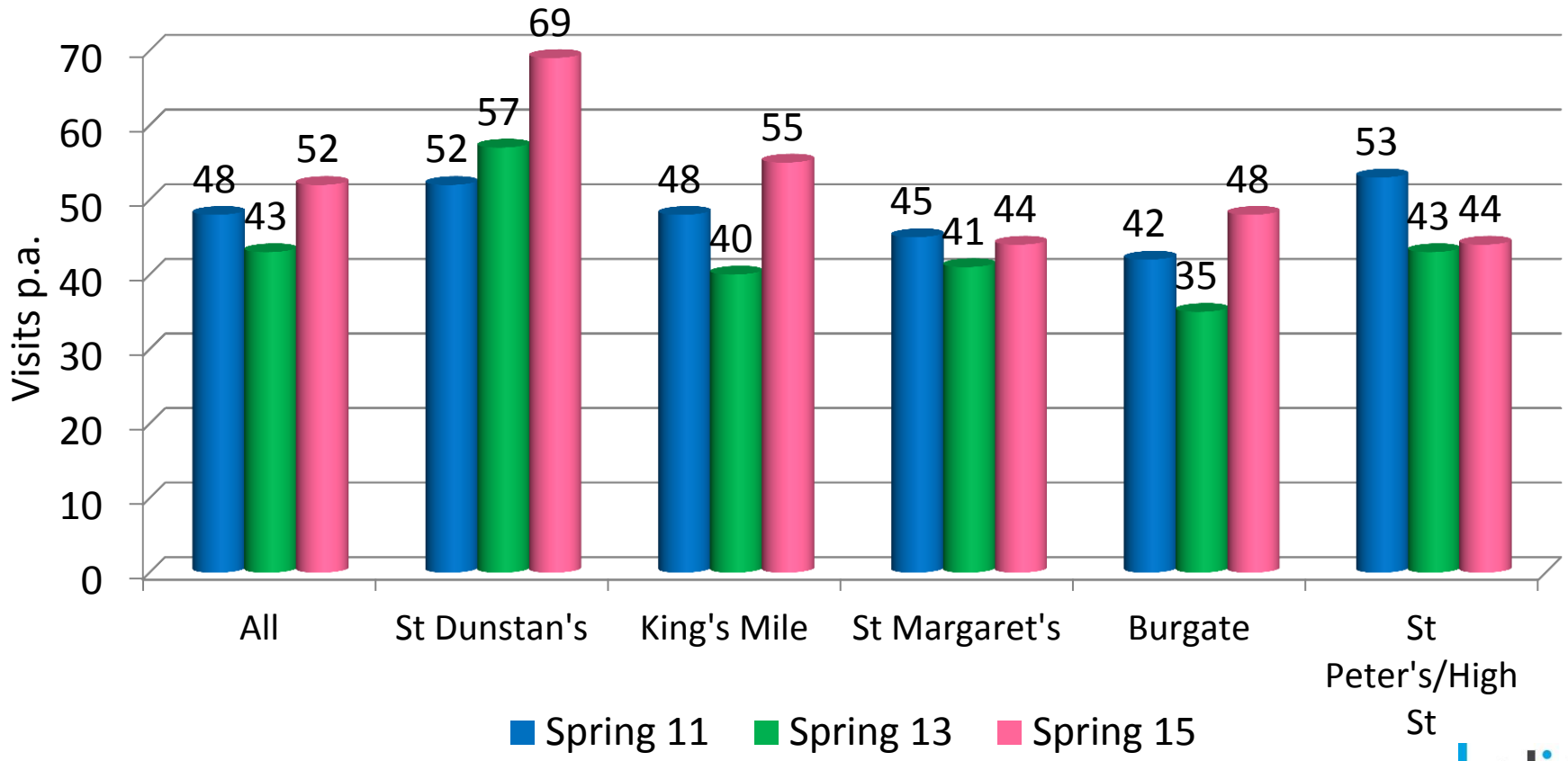
Visit Frequency: Non-foods

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

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



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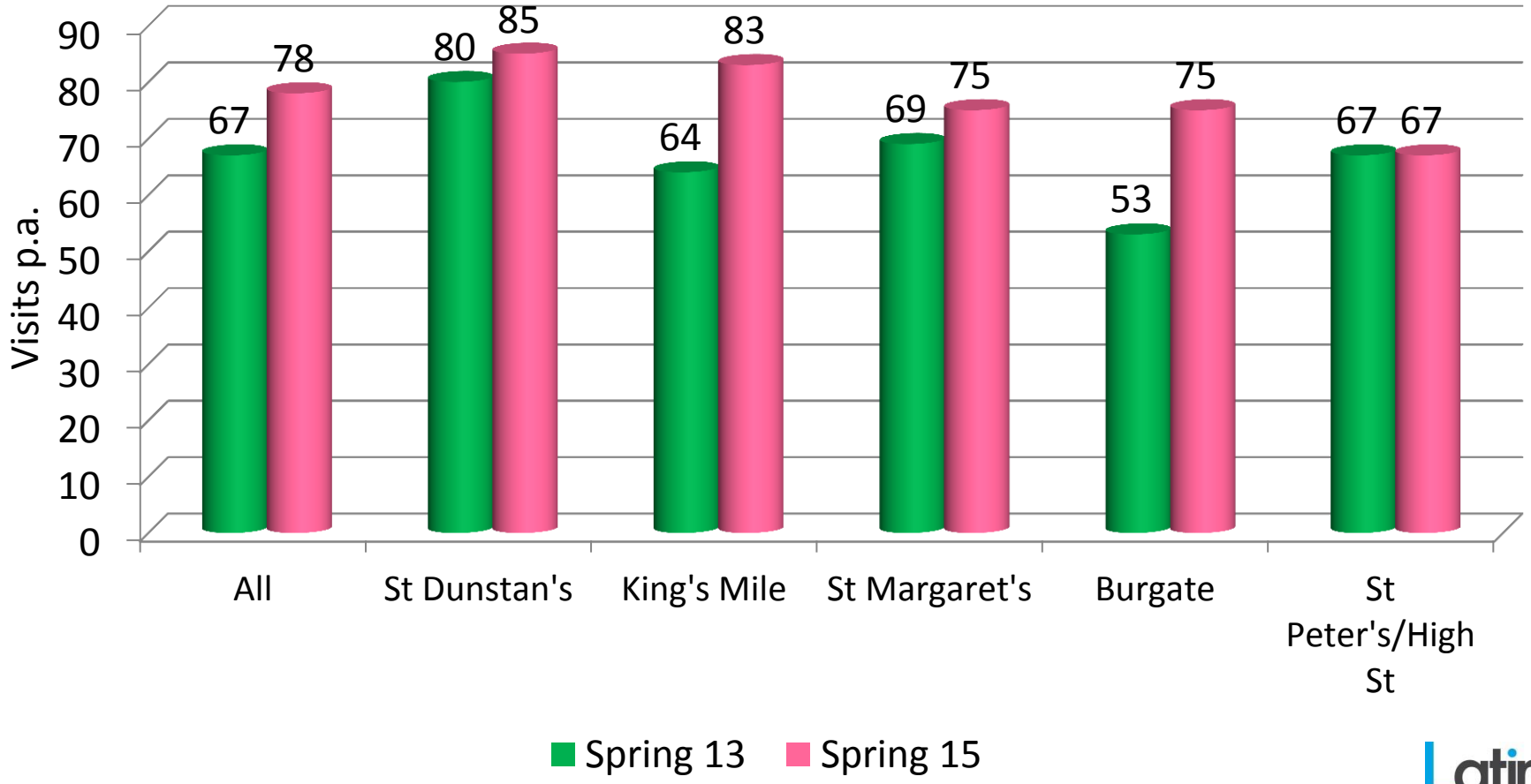
Visit Frequency: Grocery

How often do you visit Canterbury for grocery shopping ?

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



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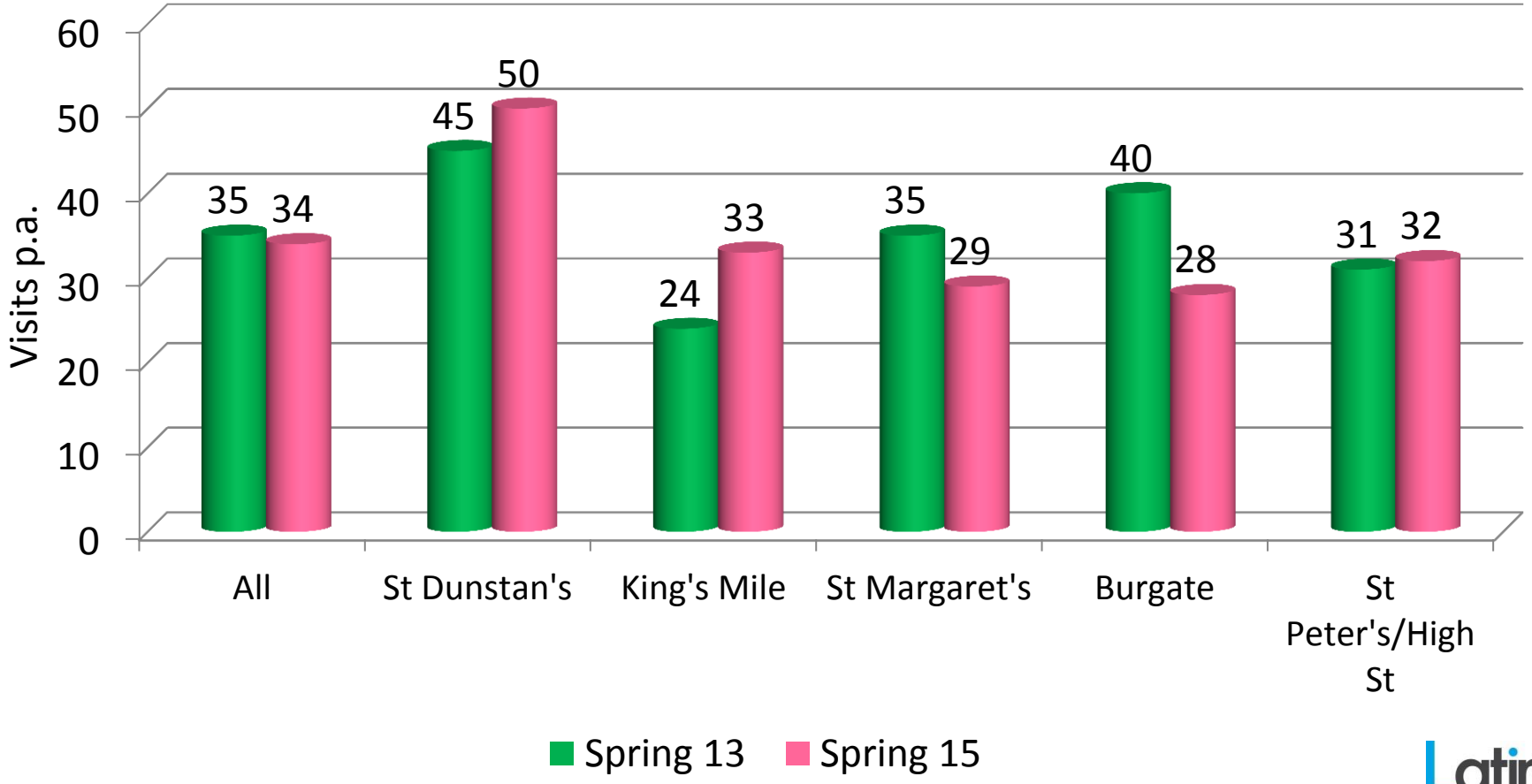
Visit Frequency: Entertainment

How often do you visit Canterbury for entertainment?

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



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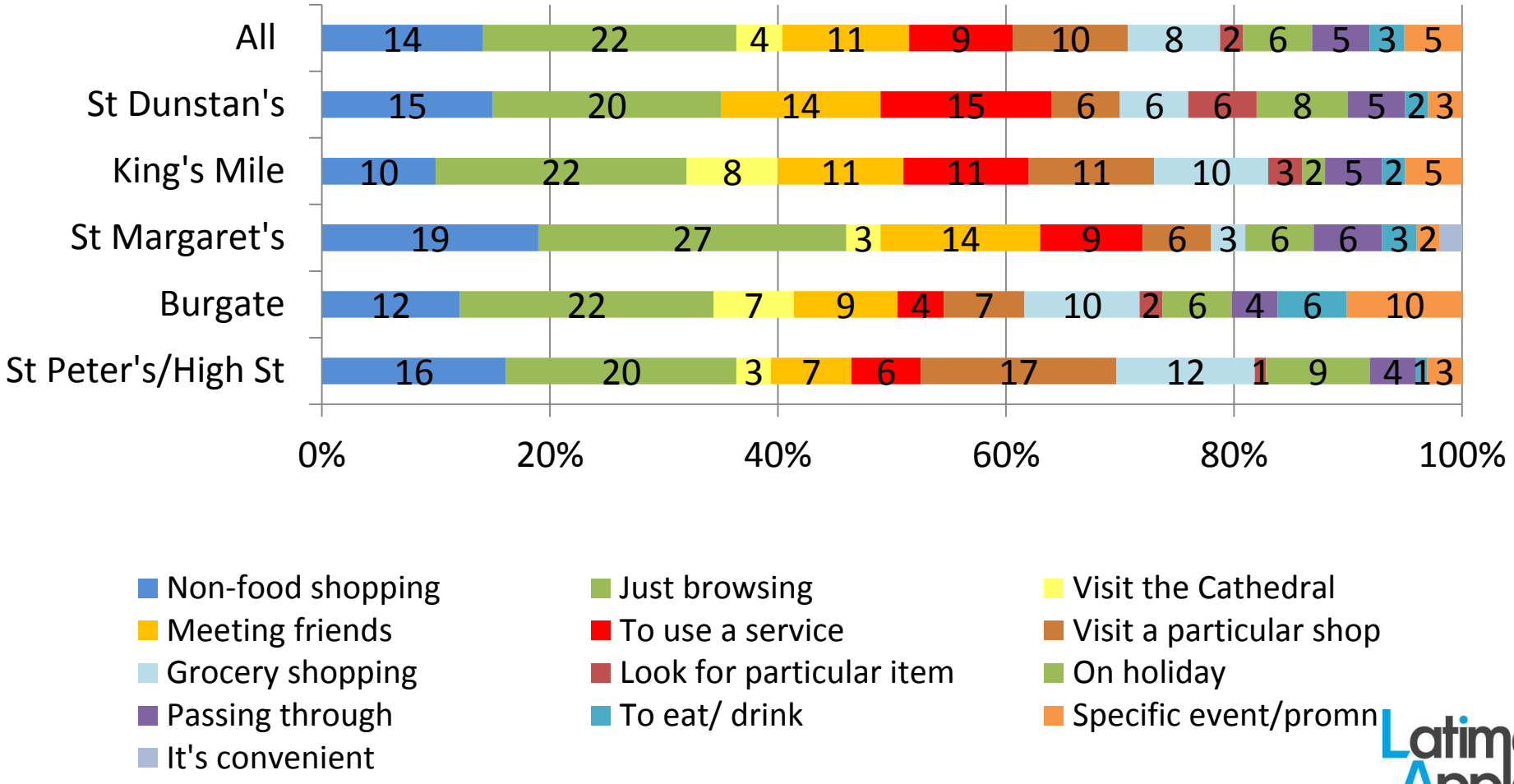
Main Reason for Visit (Spring 15)

What was your main reason for being here today?

(n = all respondents)



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Main Reason for Visit (Spring 13)

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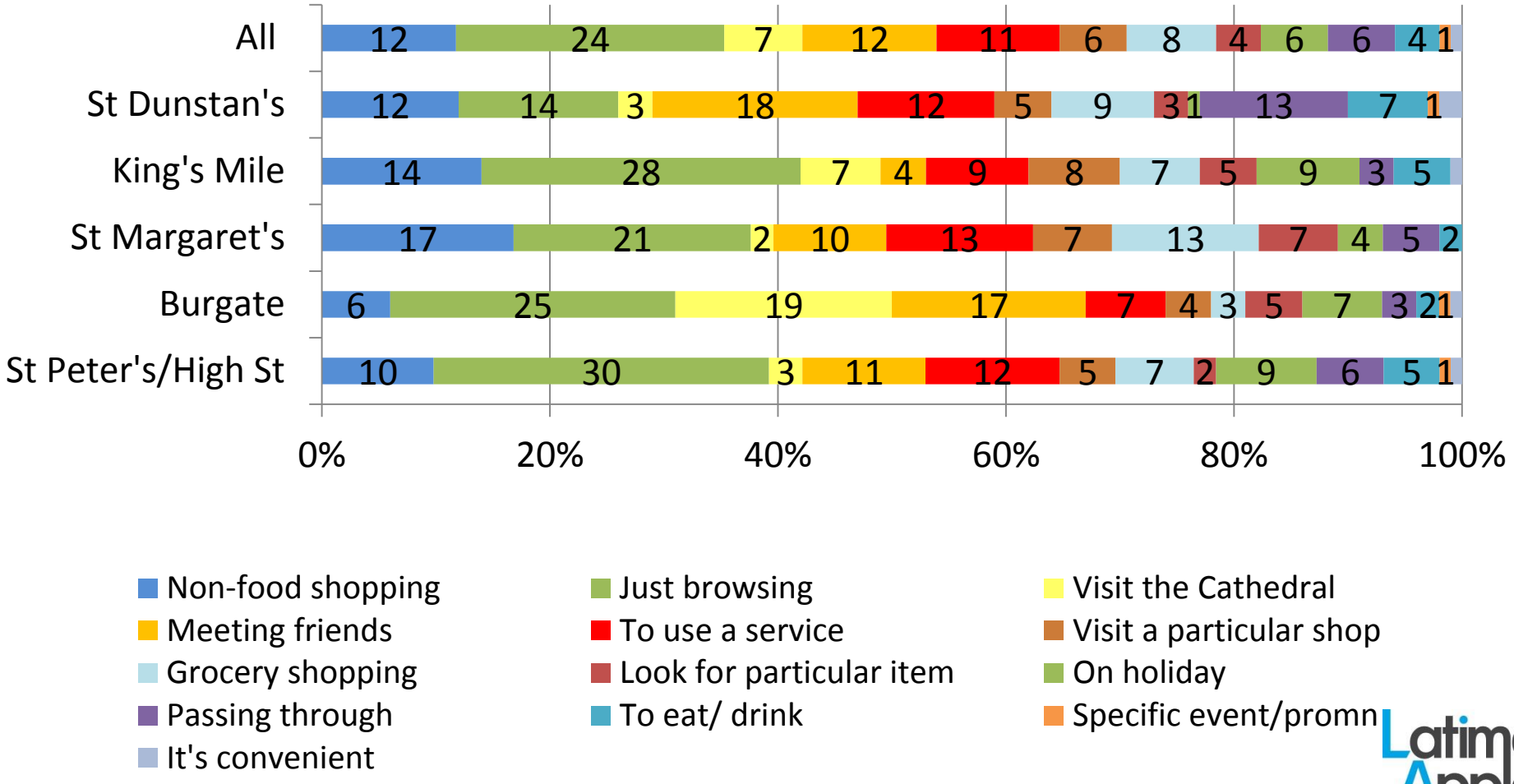
(n = all respondents)



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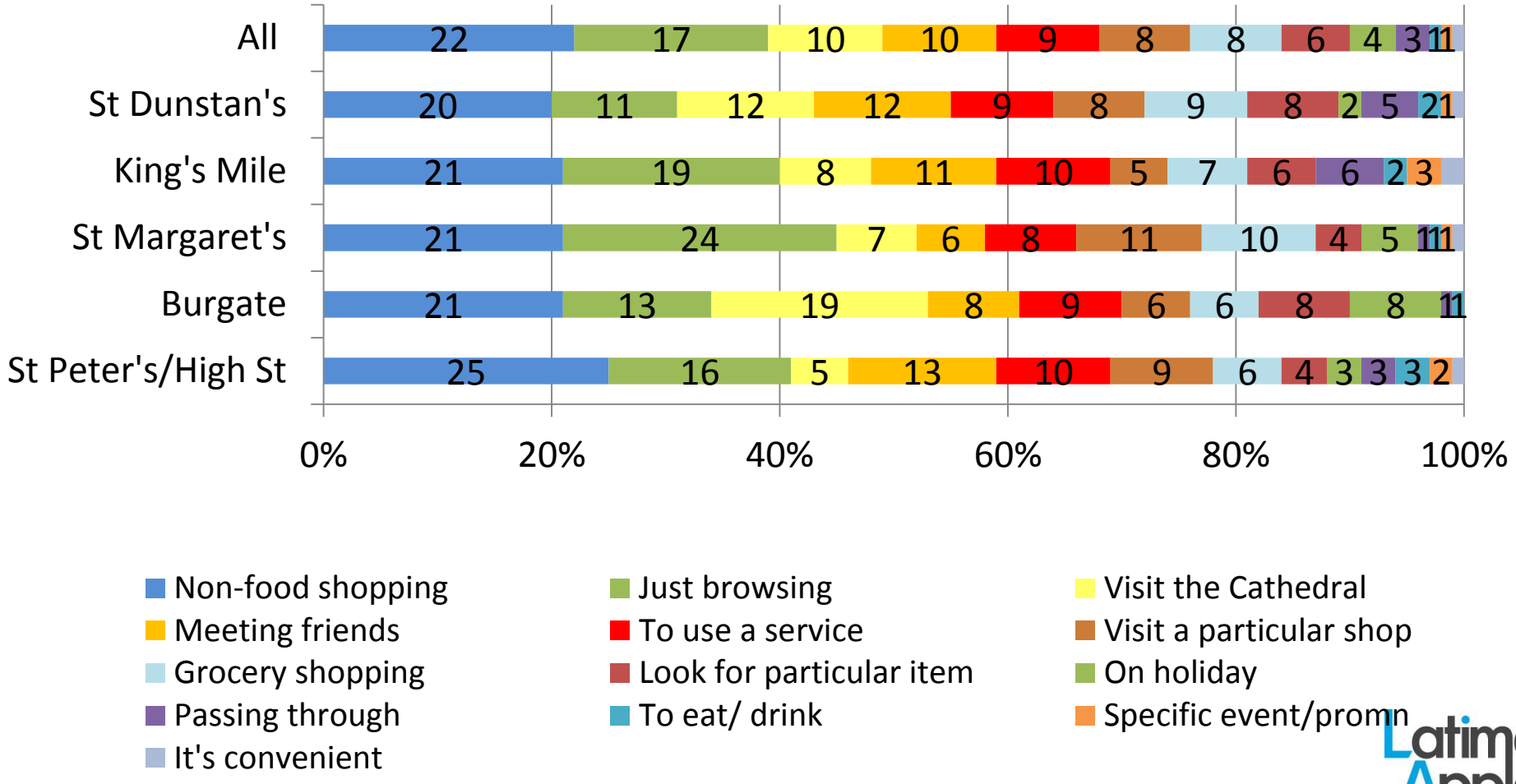

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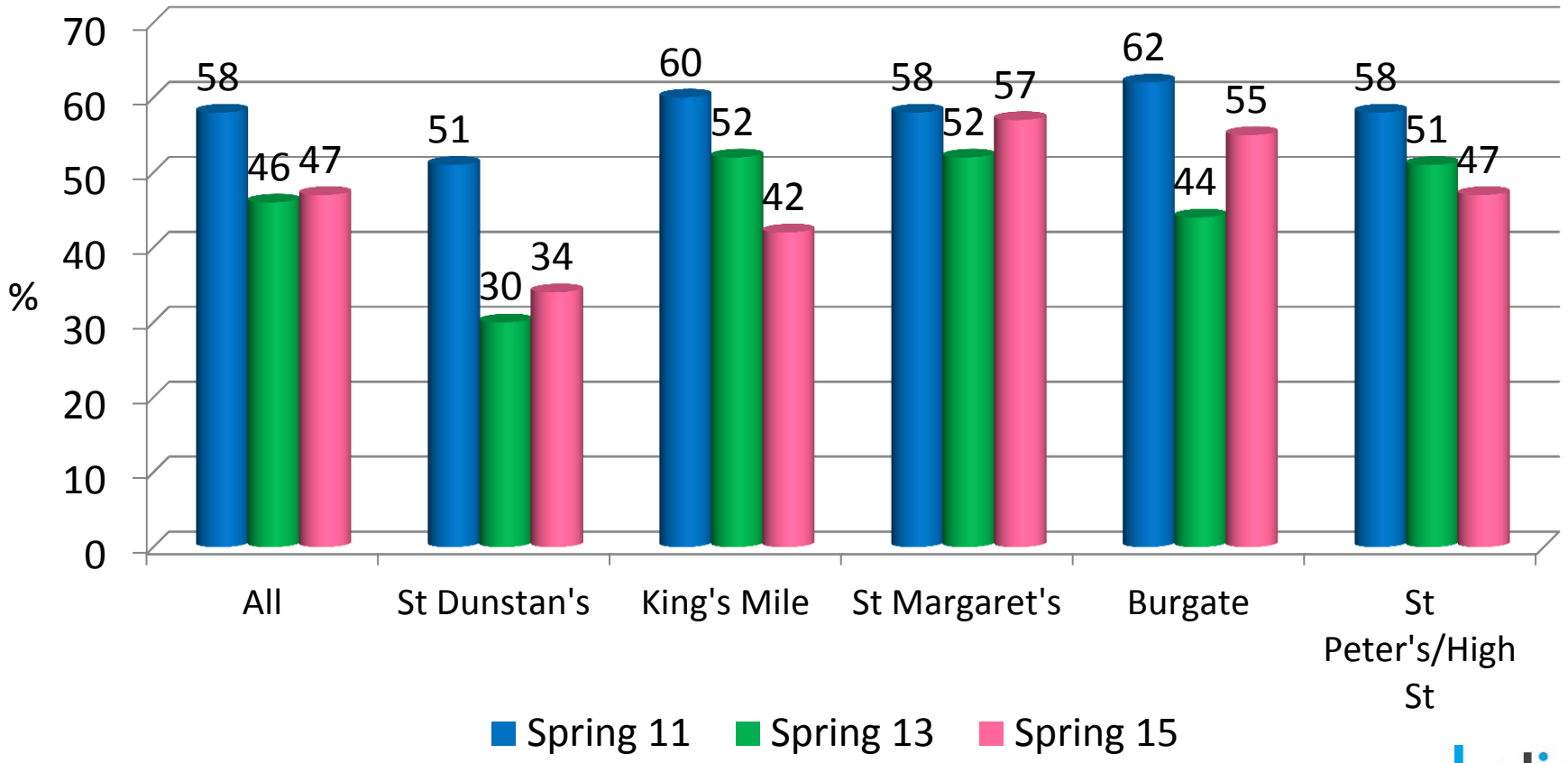
Non-food Conversion

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

(n = all respondents)



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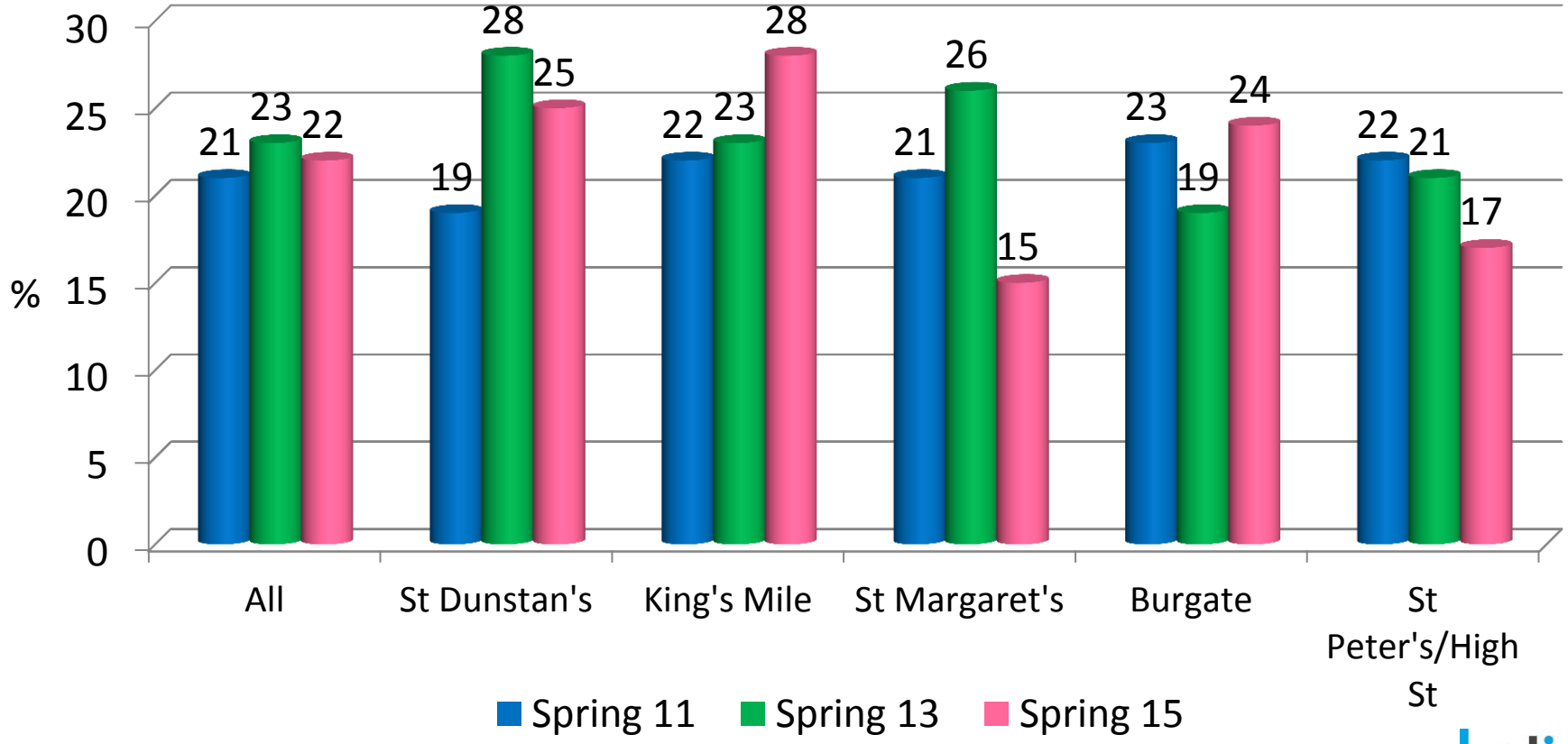
Grocery Conversion

Proportion making grocery purchases in Canterbury city centre today?

(n = all respondents)



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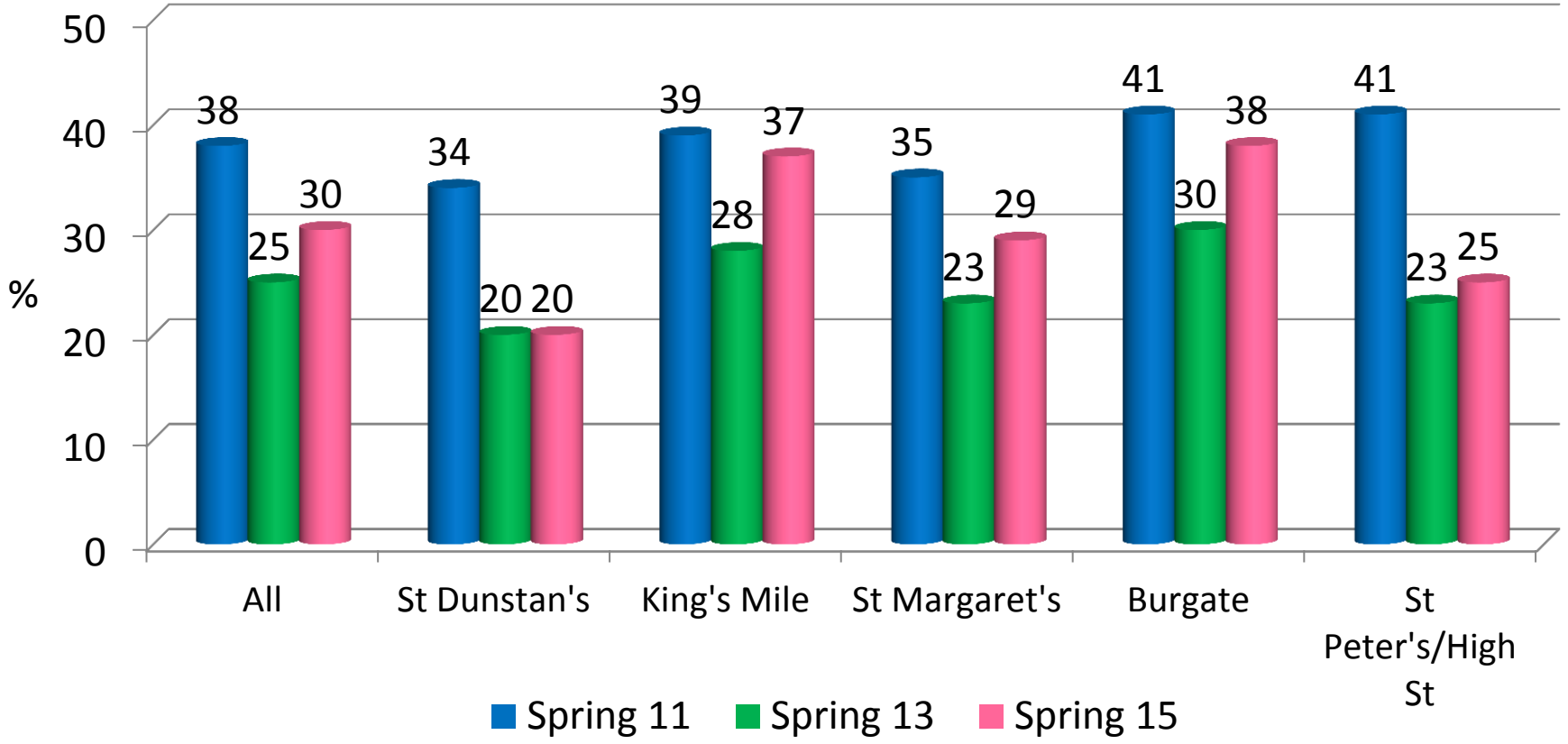
Entertainment Conversion

Proportion making entertainment purchases in Canterbury city centre today?

(n = all respondents)



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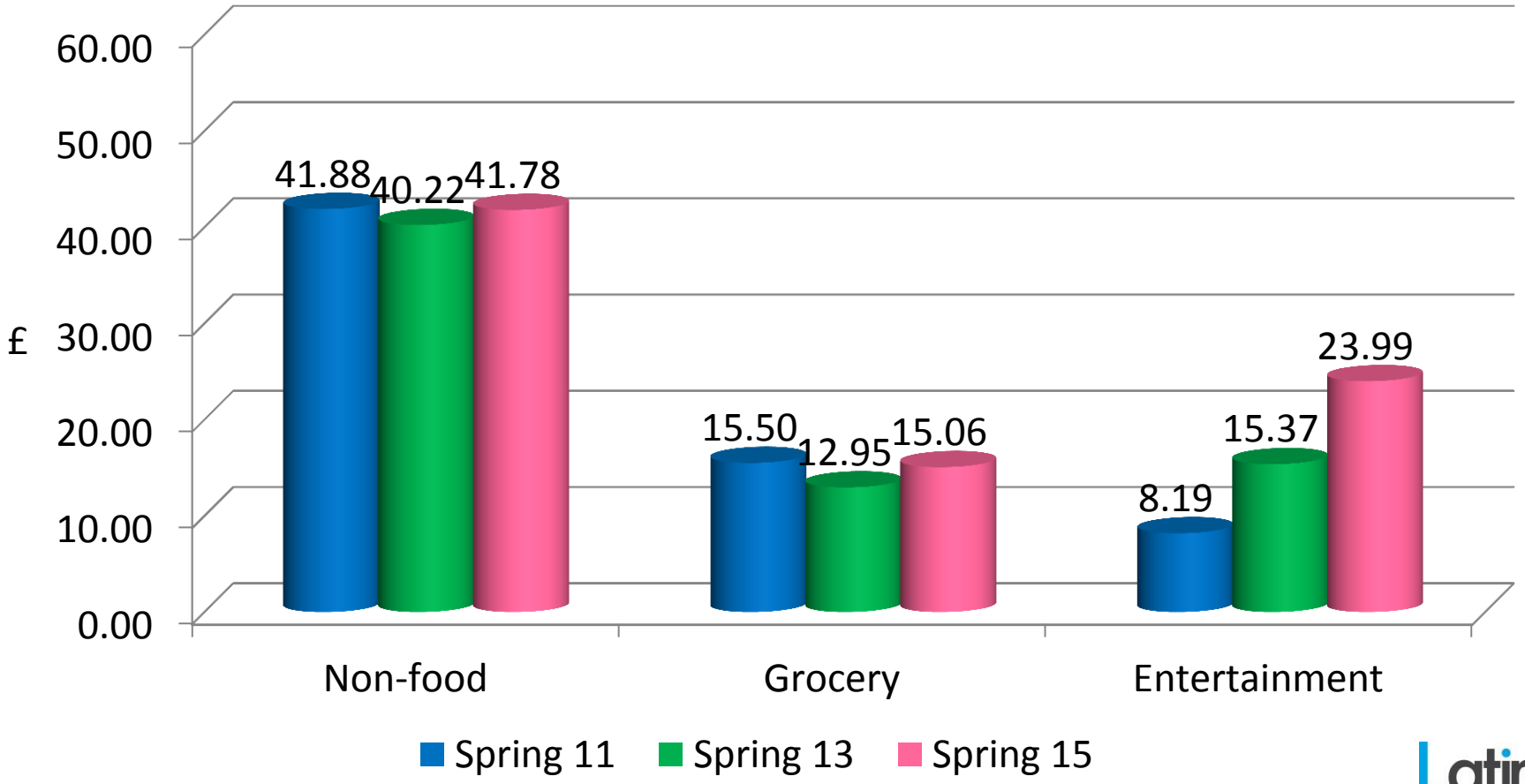
Average Party Spend

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

(n = those who have spent on each category)



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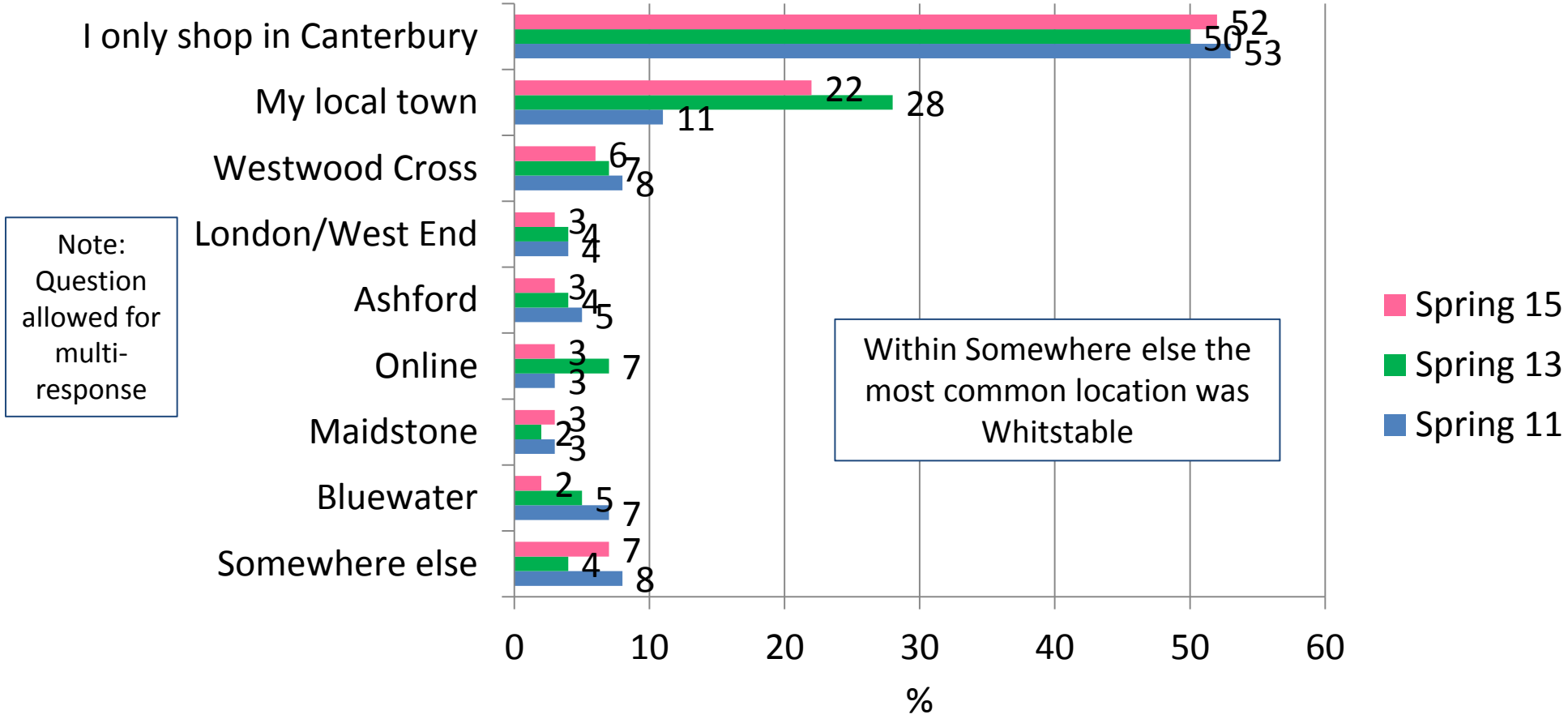
Alternative Purchase Location

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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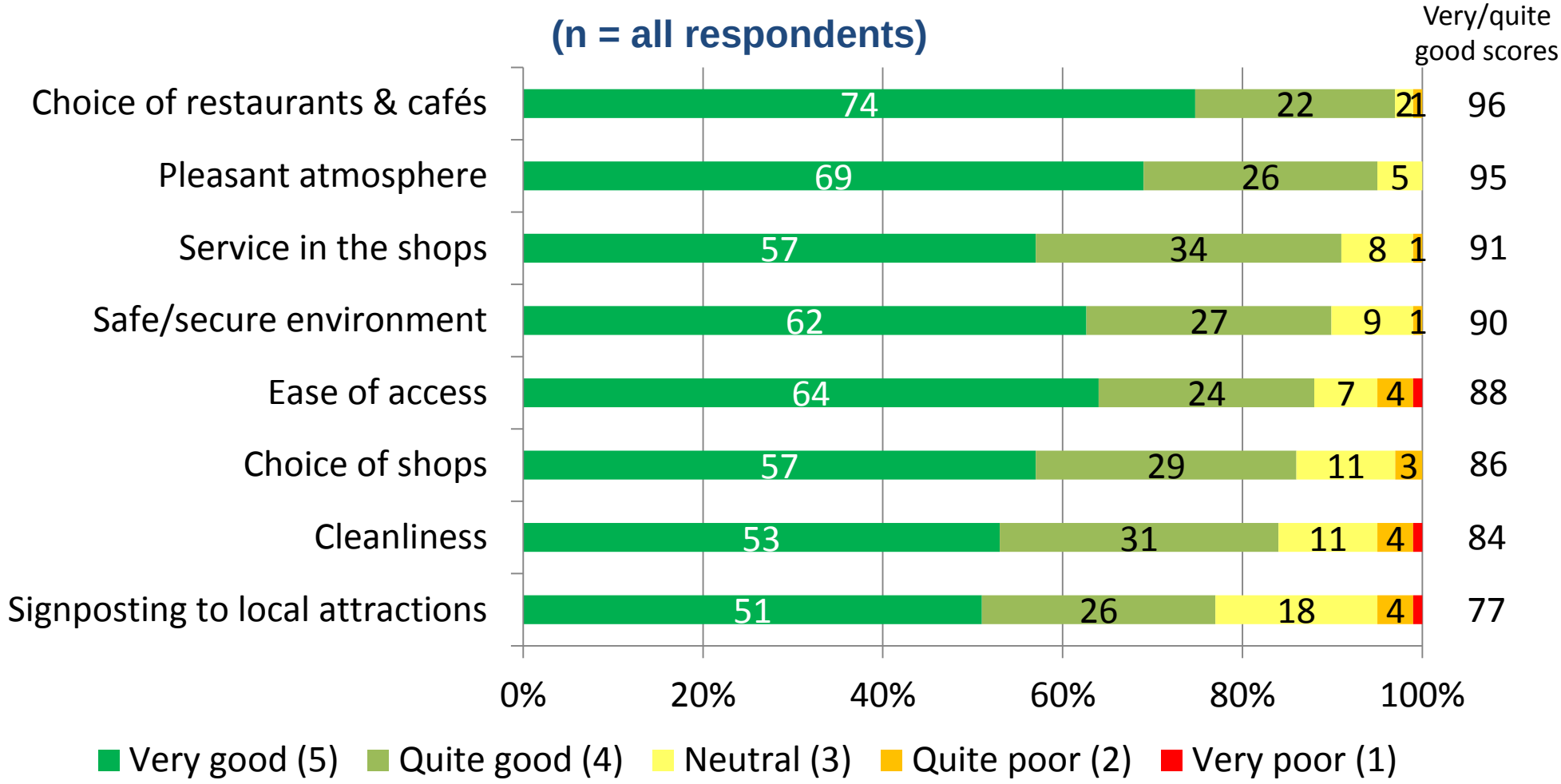
City centre Ratings (Spring 15)

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

(n = all respondents)



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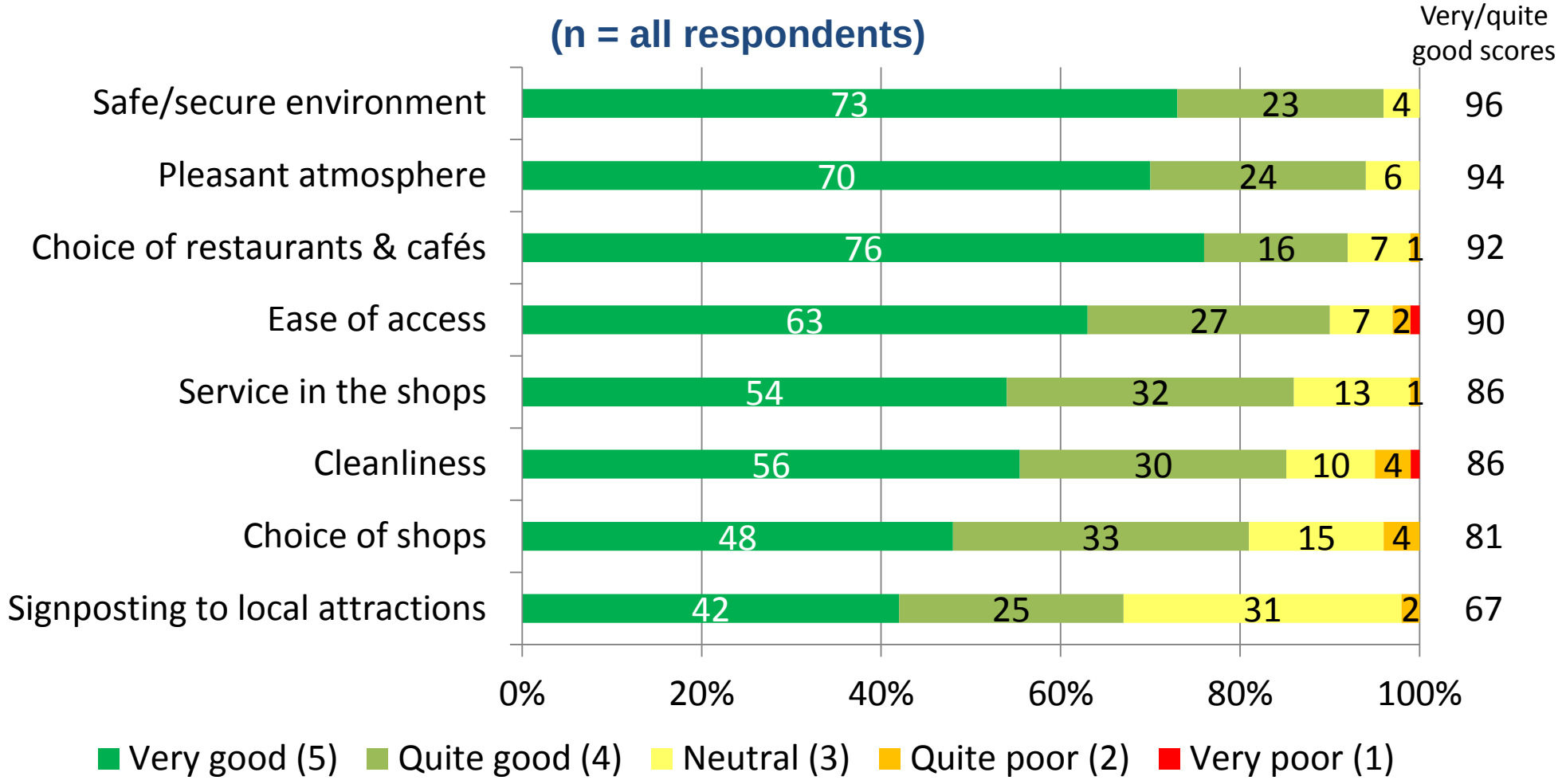

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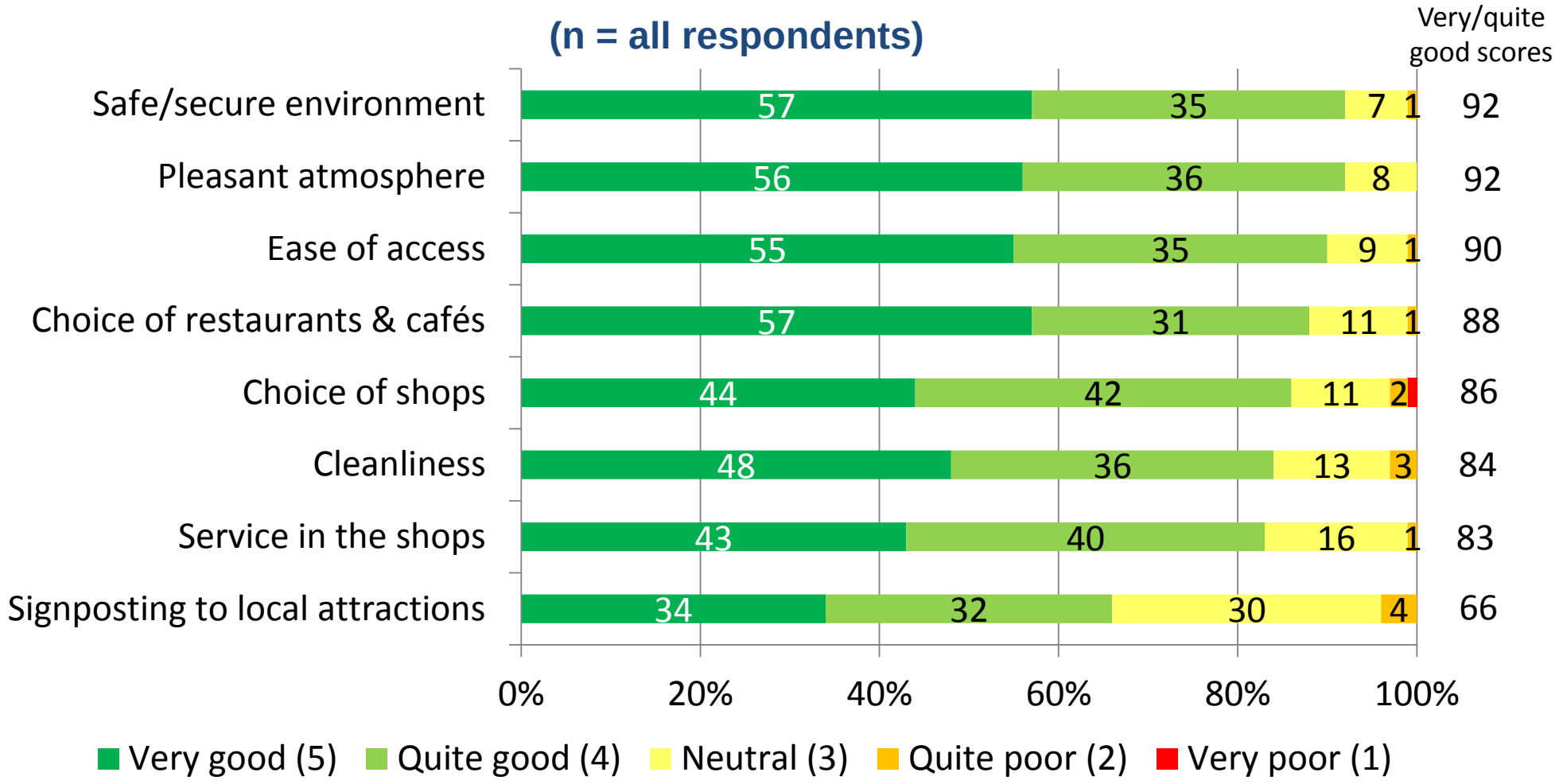

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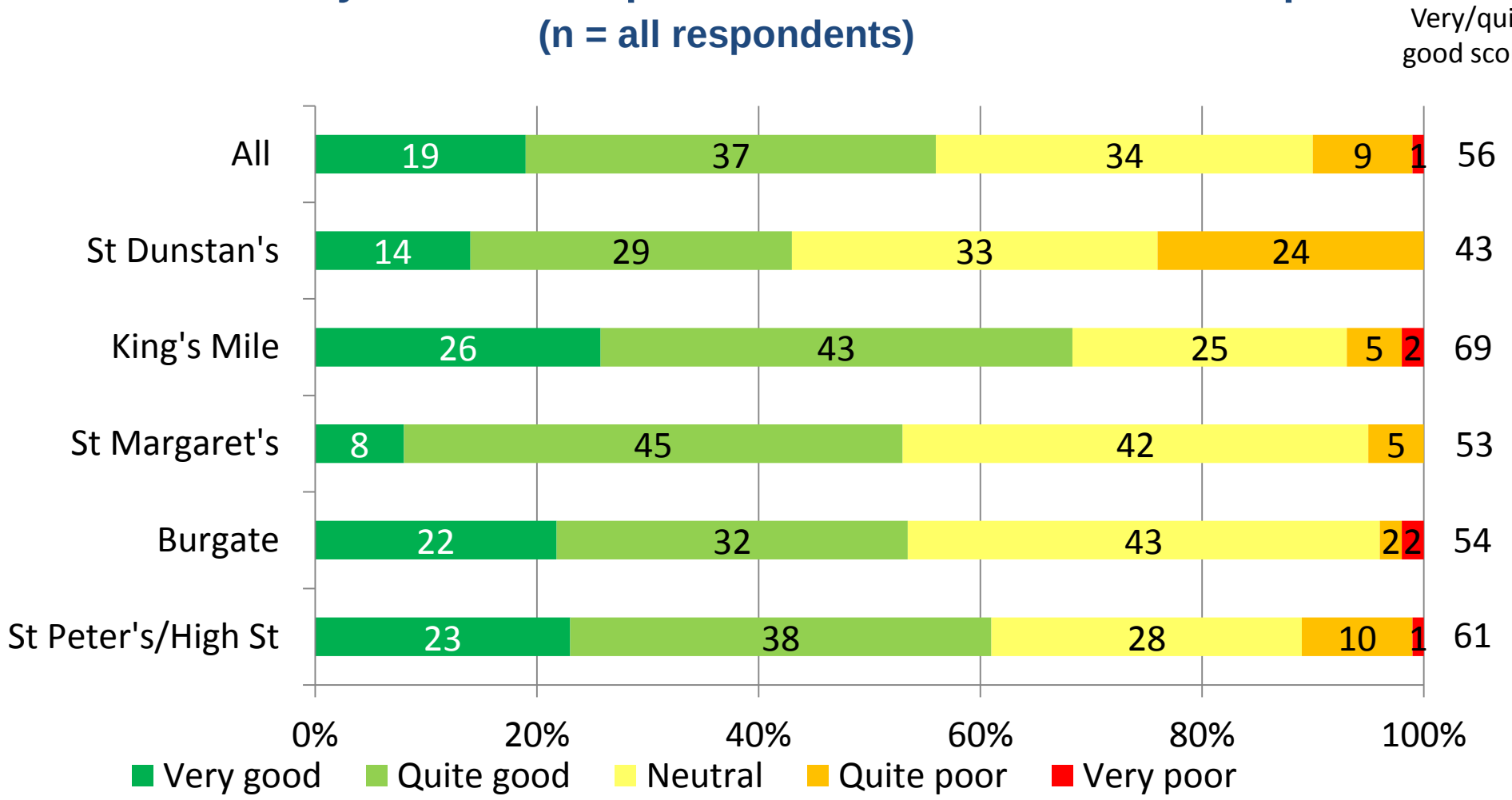
Area ratings: Choice of shops (Spring 15)

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

(n = all respondents)



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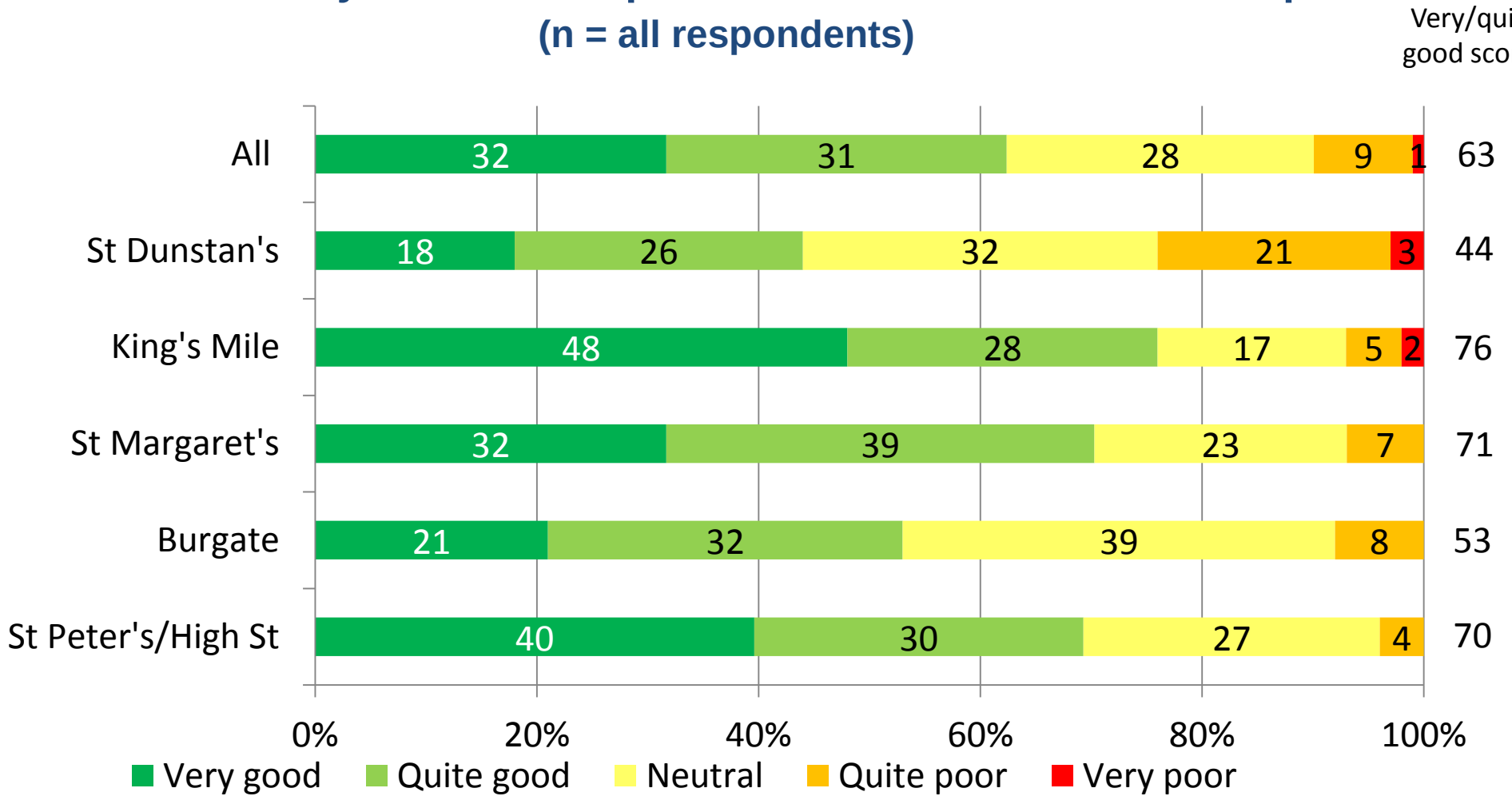

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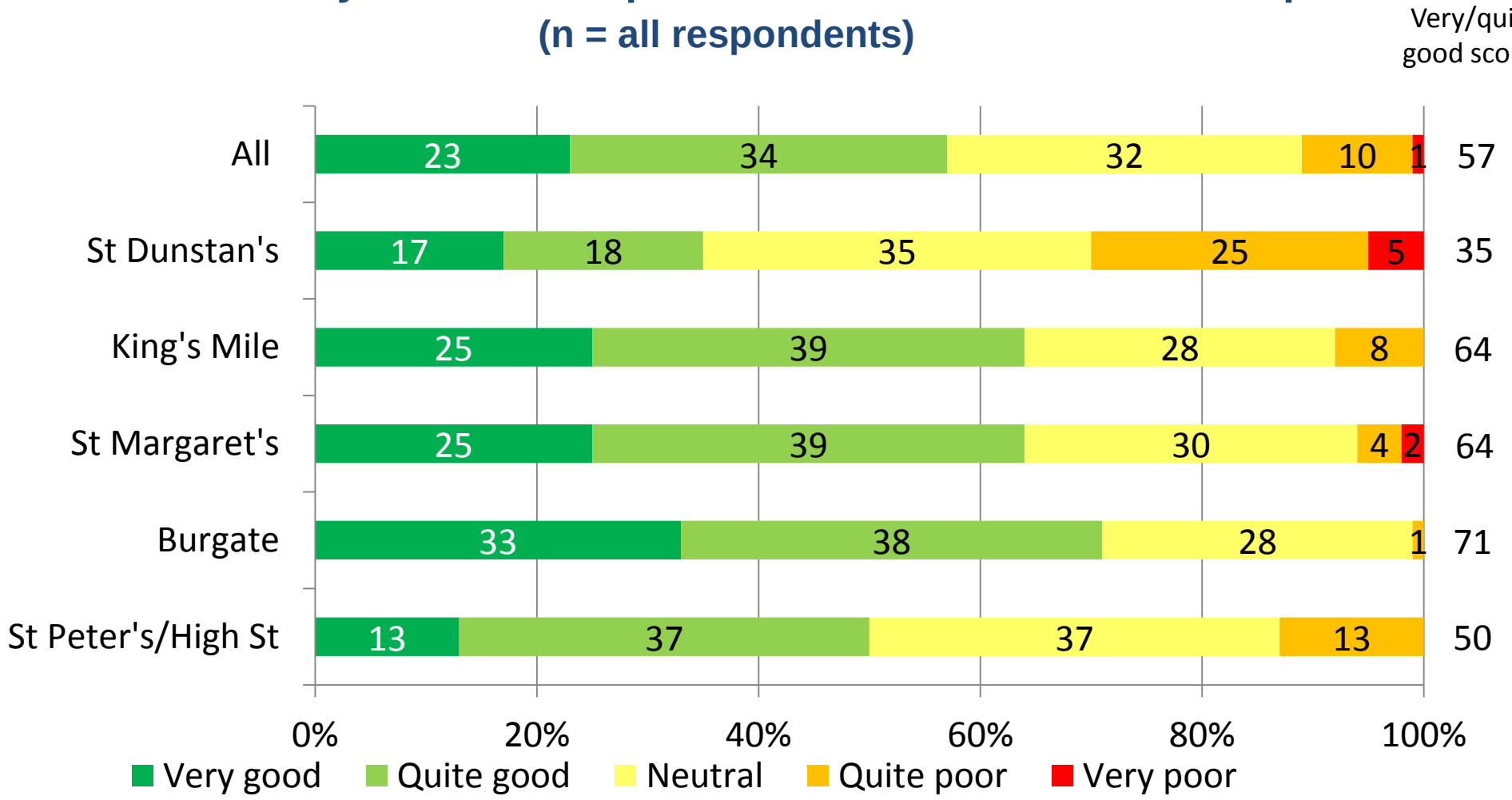

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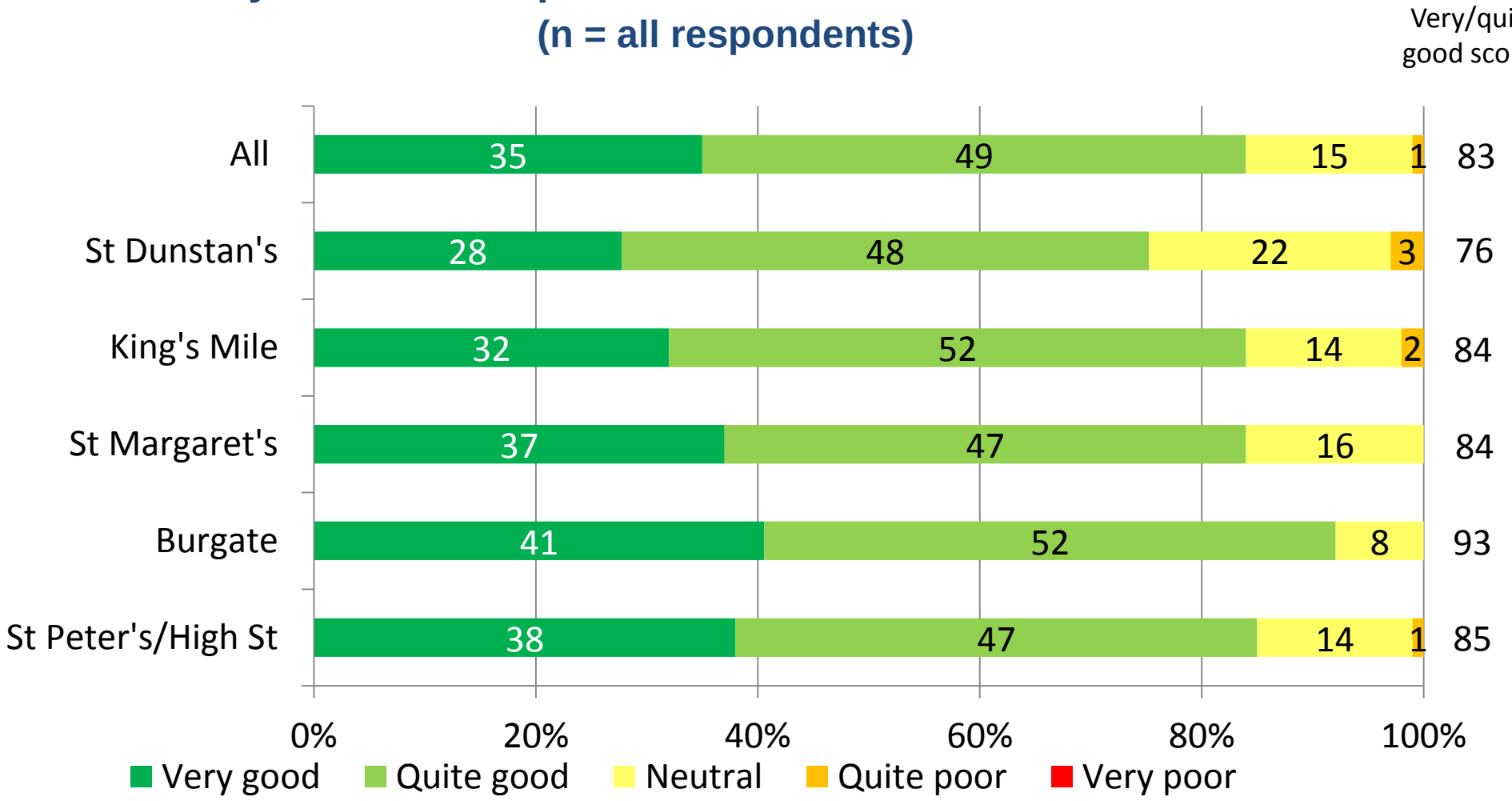
Area ratings: Safety/security (Spring 15)

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

(n = all respondents)



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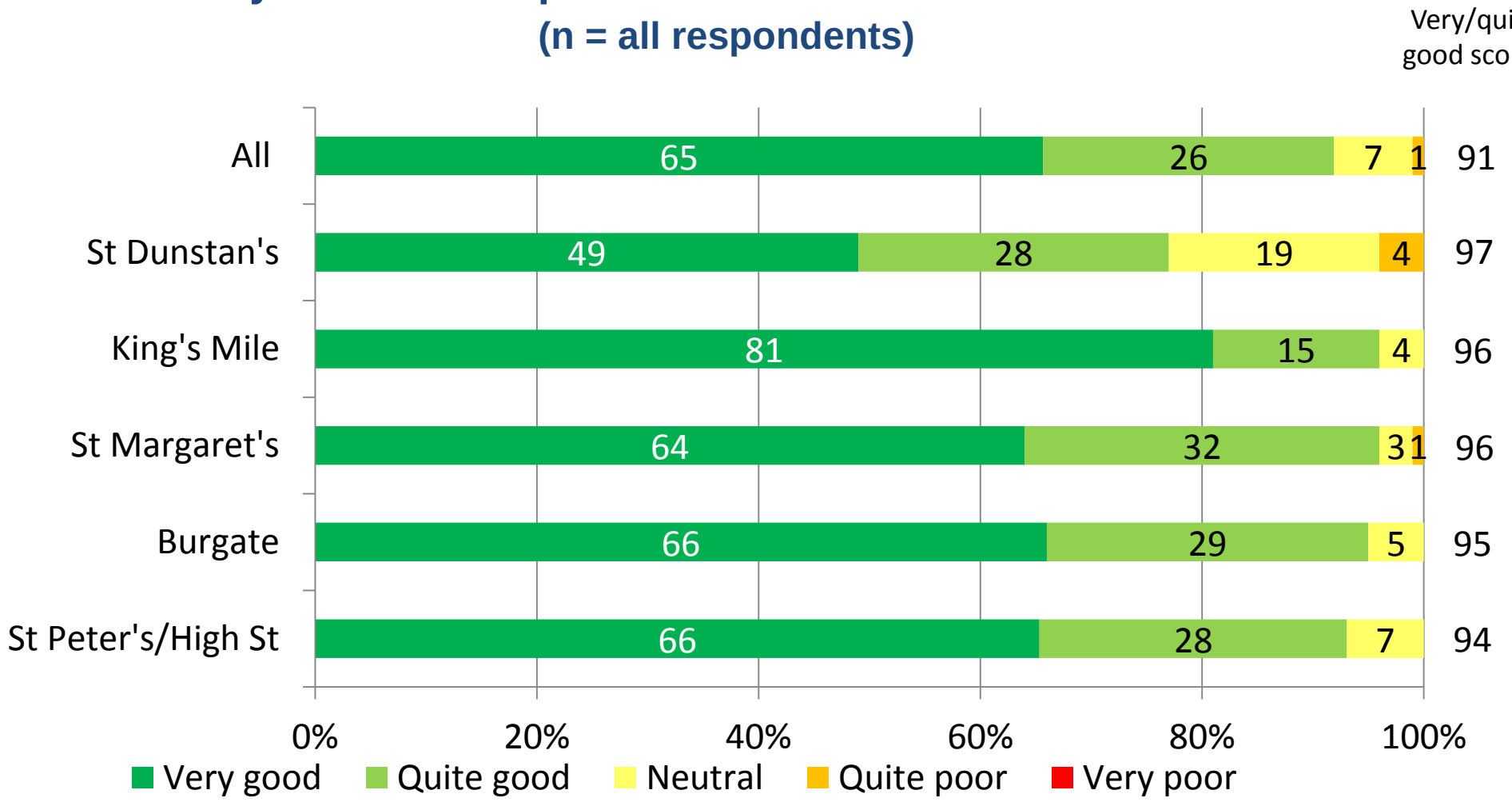

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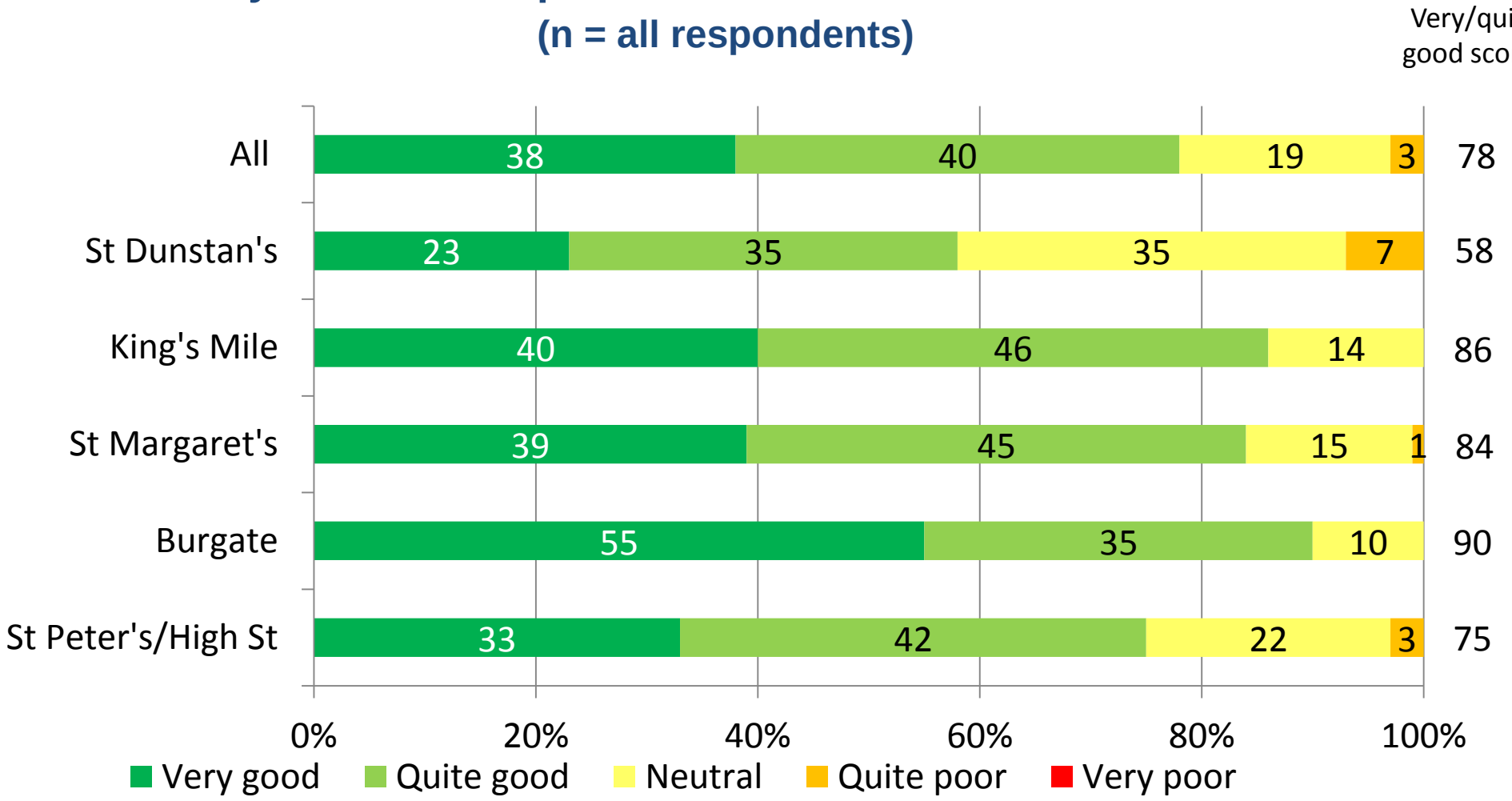
(n = all respondents)



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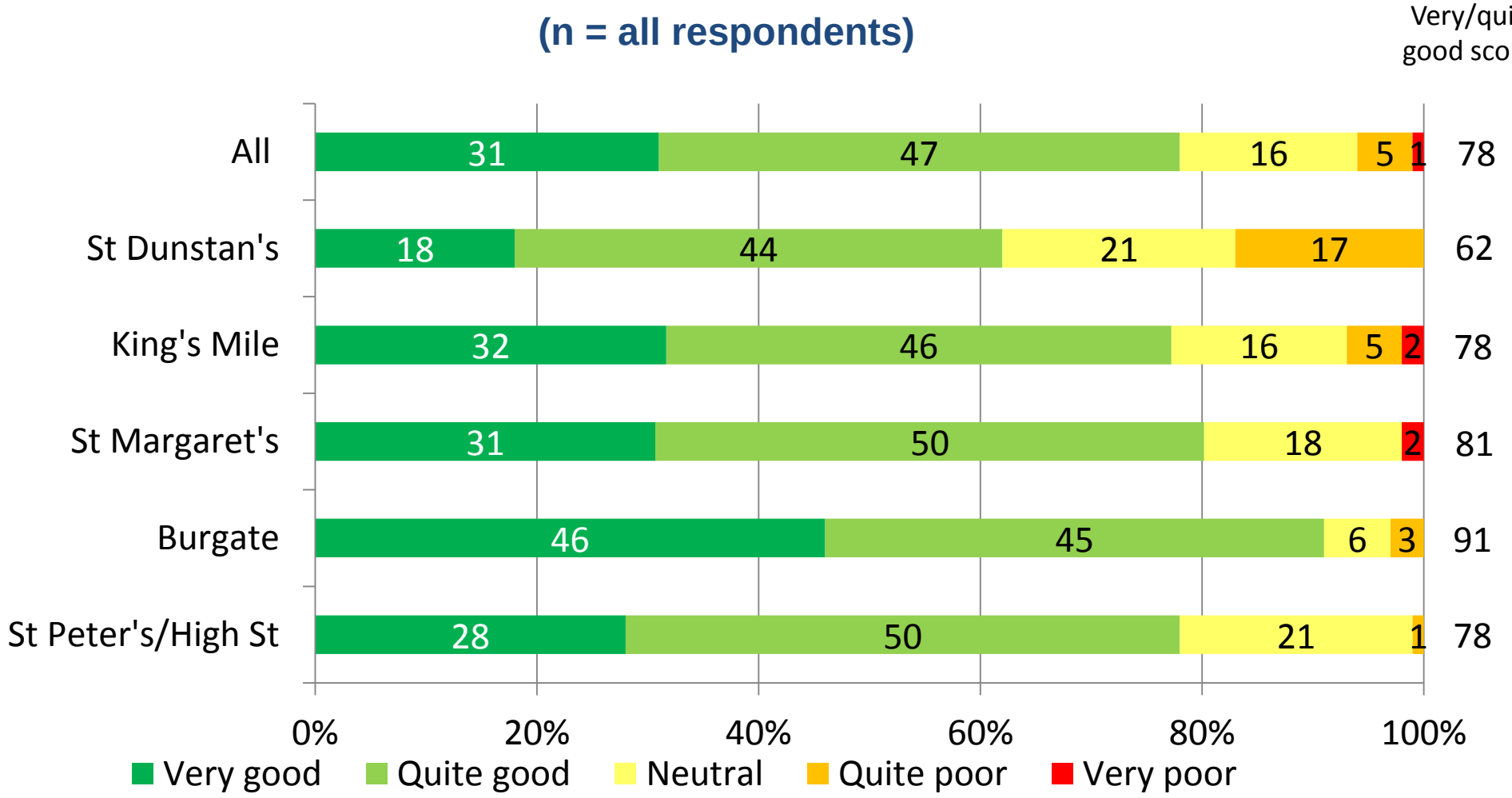
Area ratings: Cleanliness (Spring 15)

How would you rate this specific area for its Cleanliness?

(n = all respondents)



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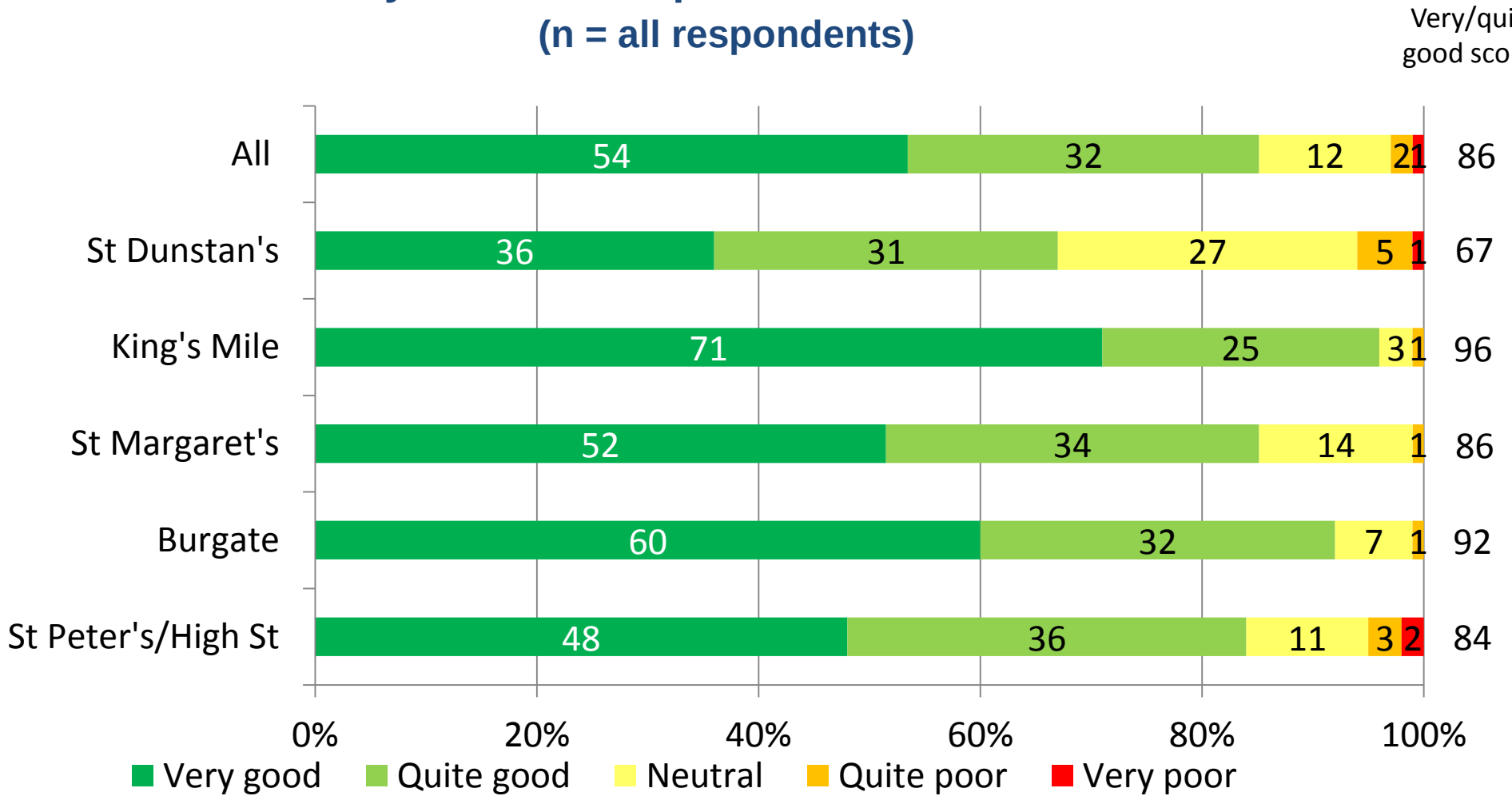

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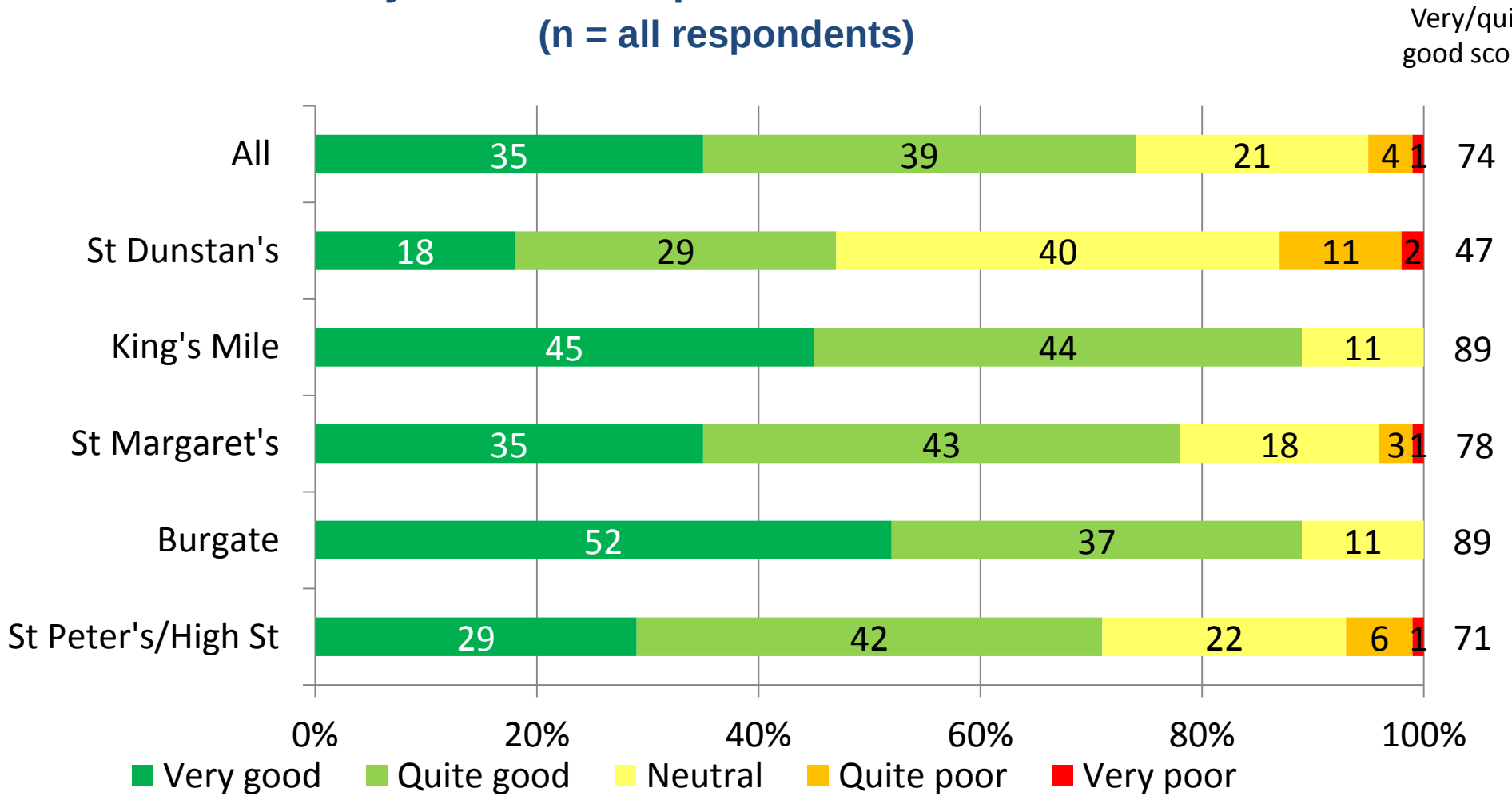
Area ratings: Cleanliness (Spring 11)

How would you rate this specific area for its Cleanliness?

(n = all respondents)



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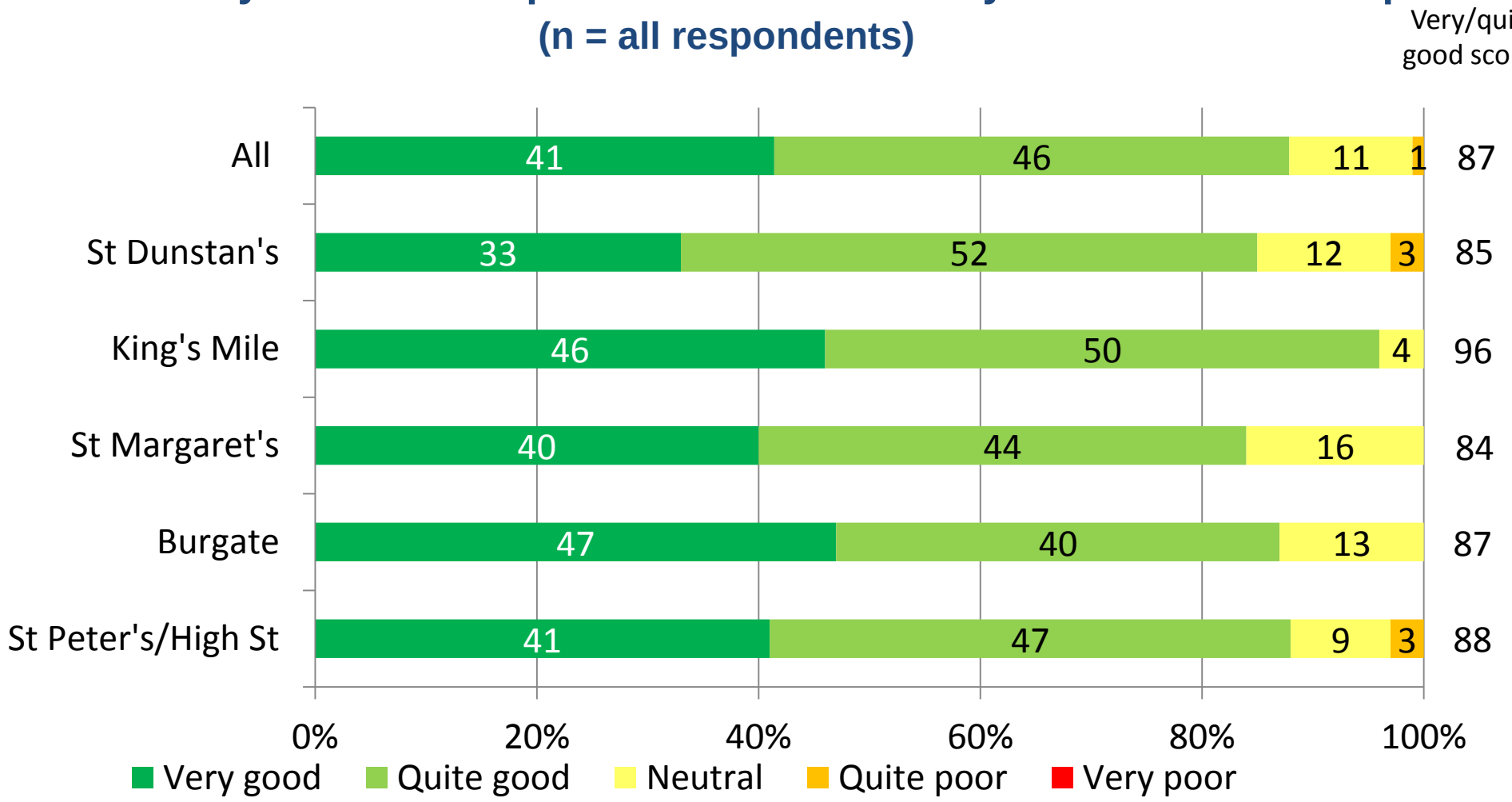
Area ratings: Service in the shops (Spring 15)

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



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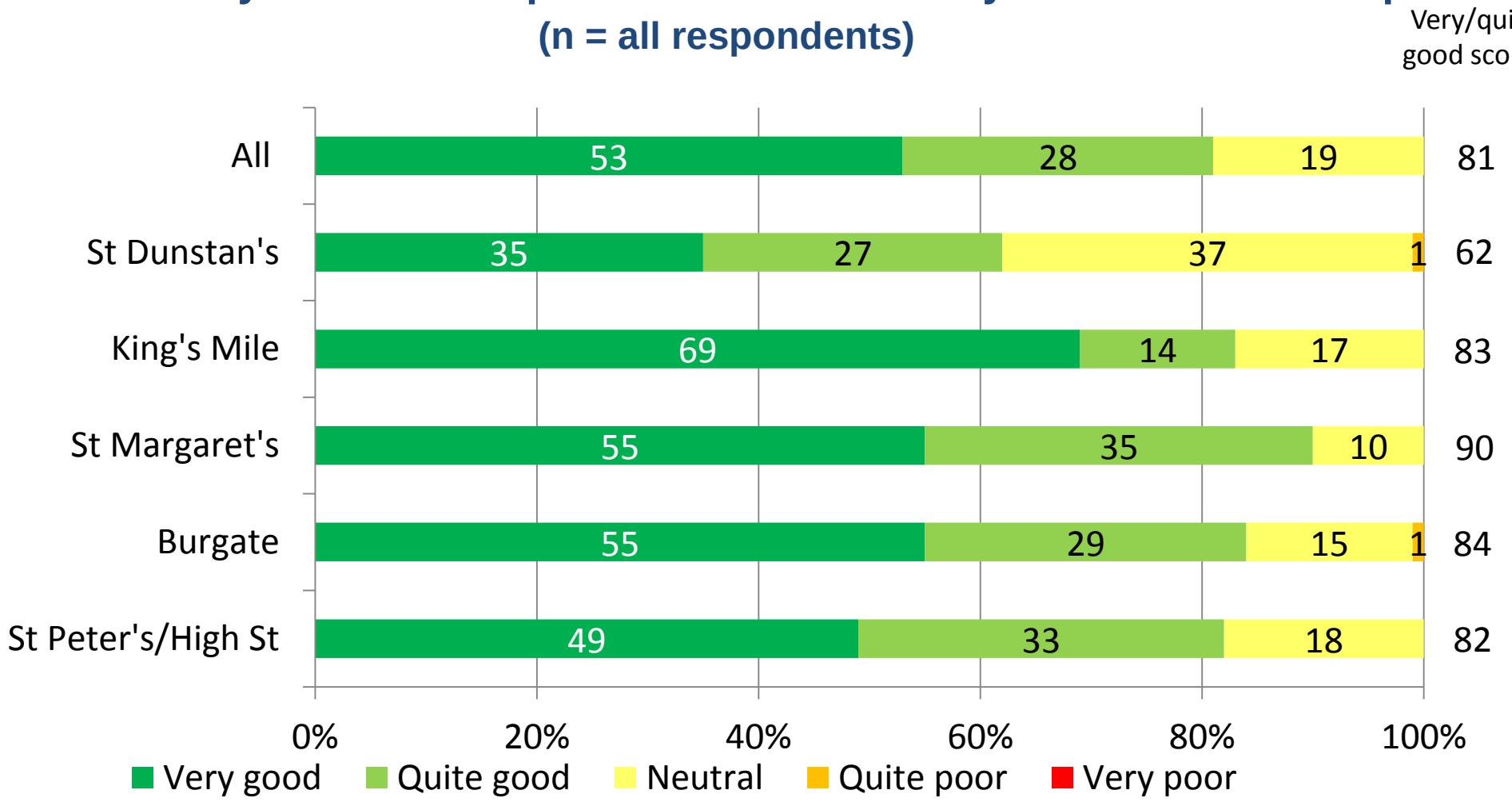

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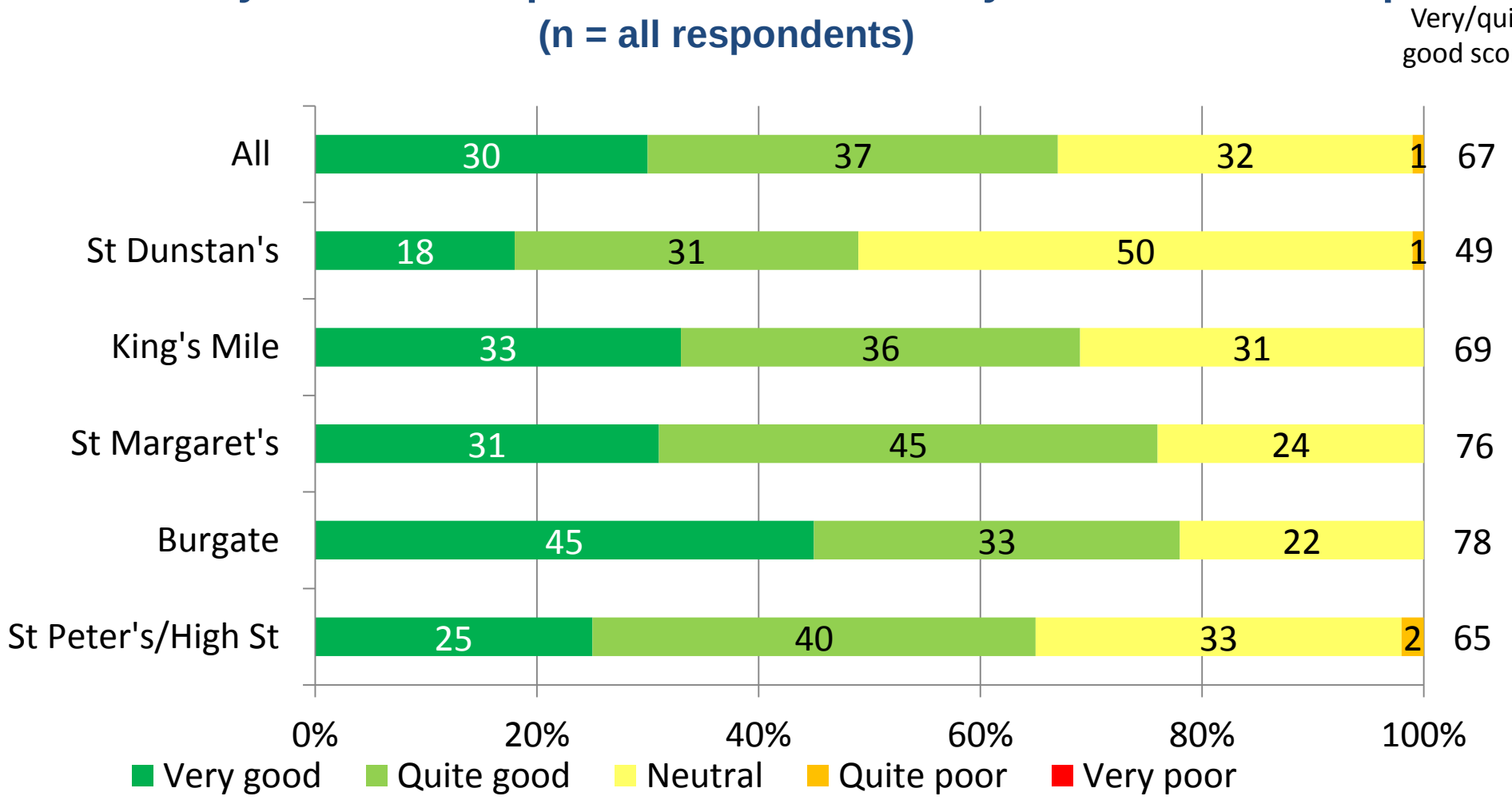

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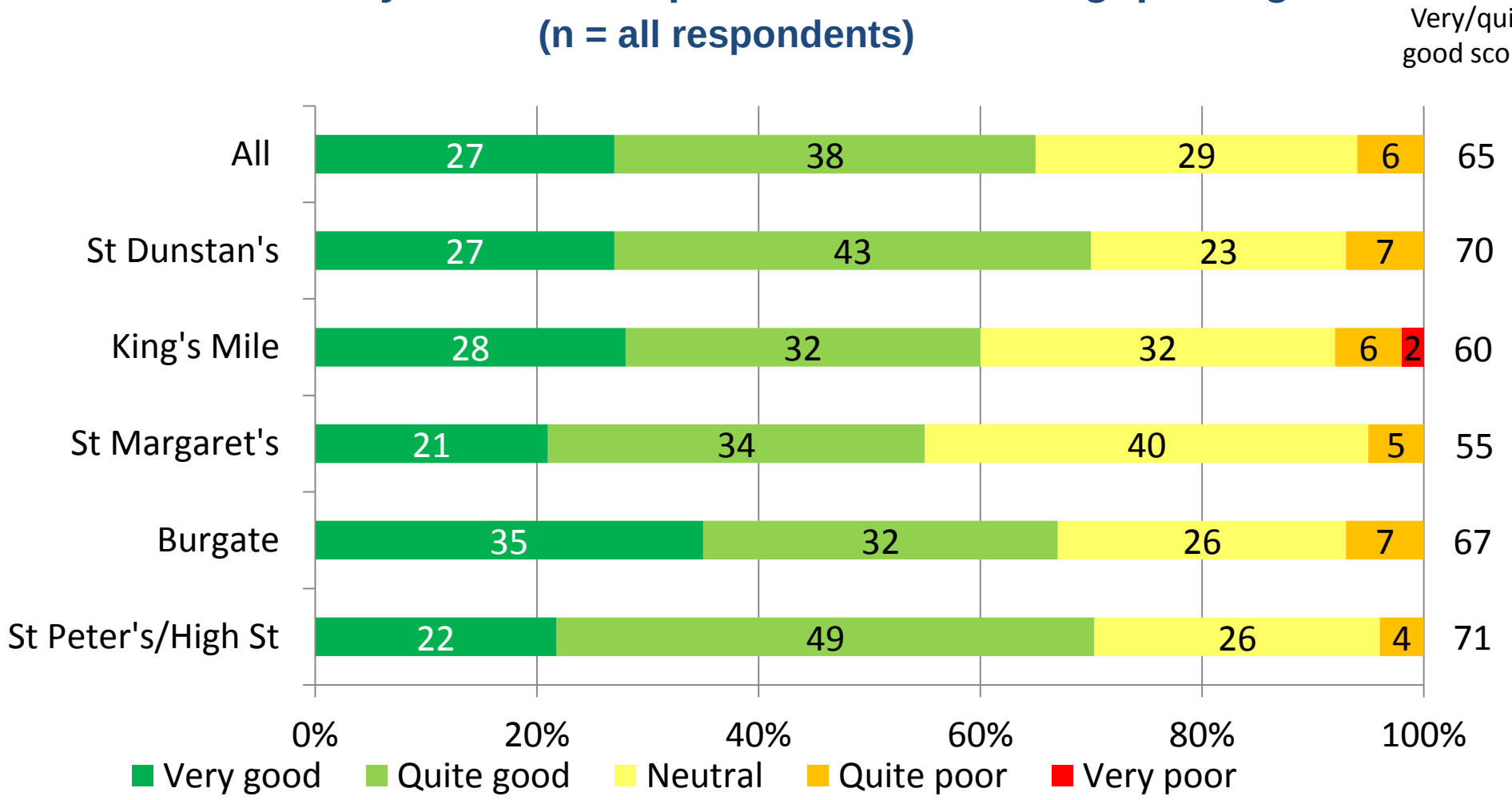
Area ratings: Signposting (Spring 15)

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



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Area ratings: Signposting (Spring 13)

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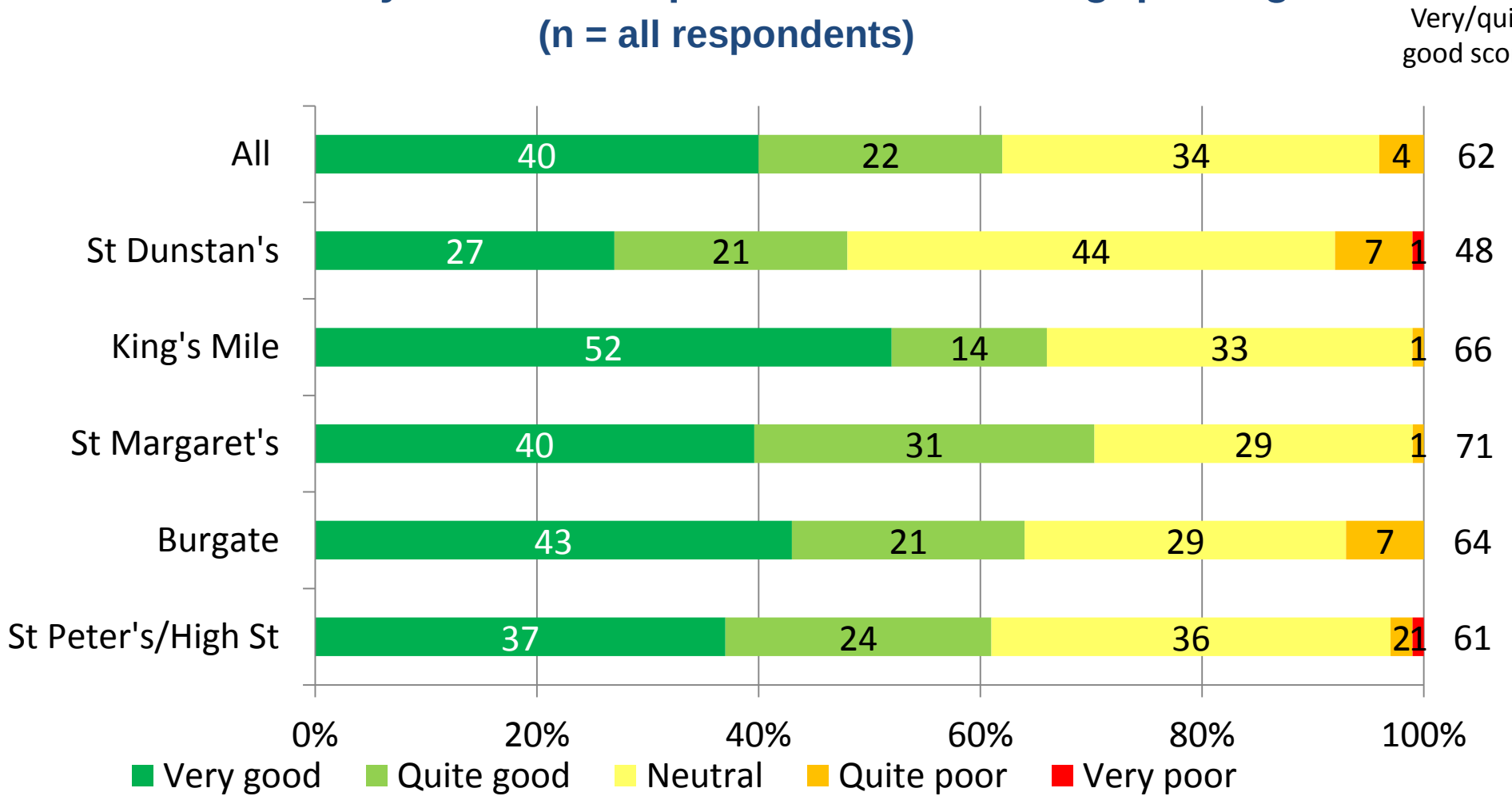
(n = all respondents)



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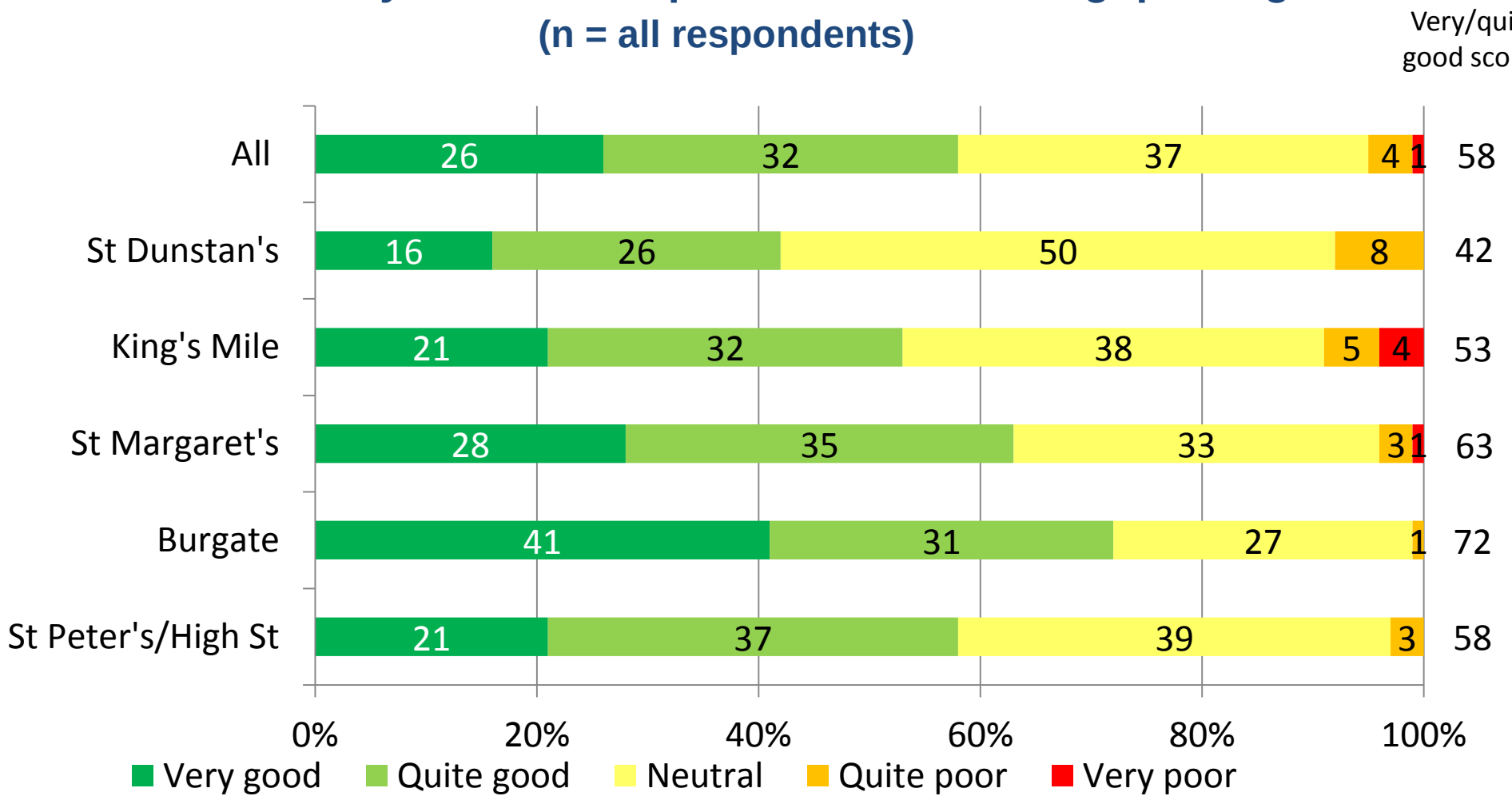

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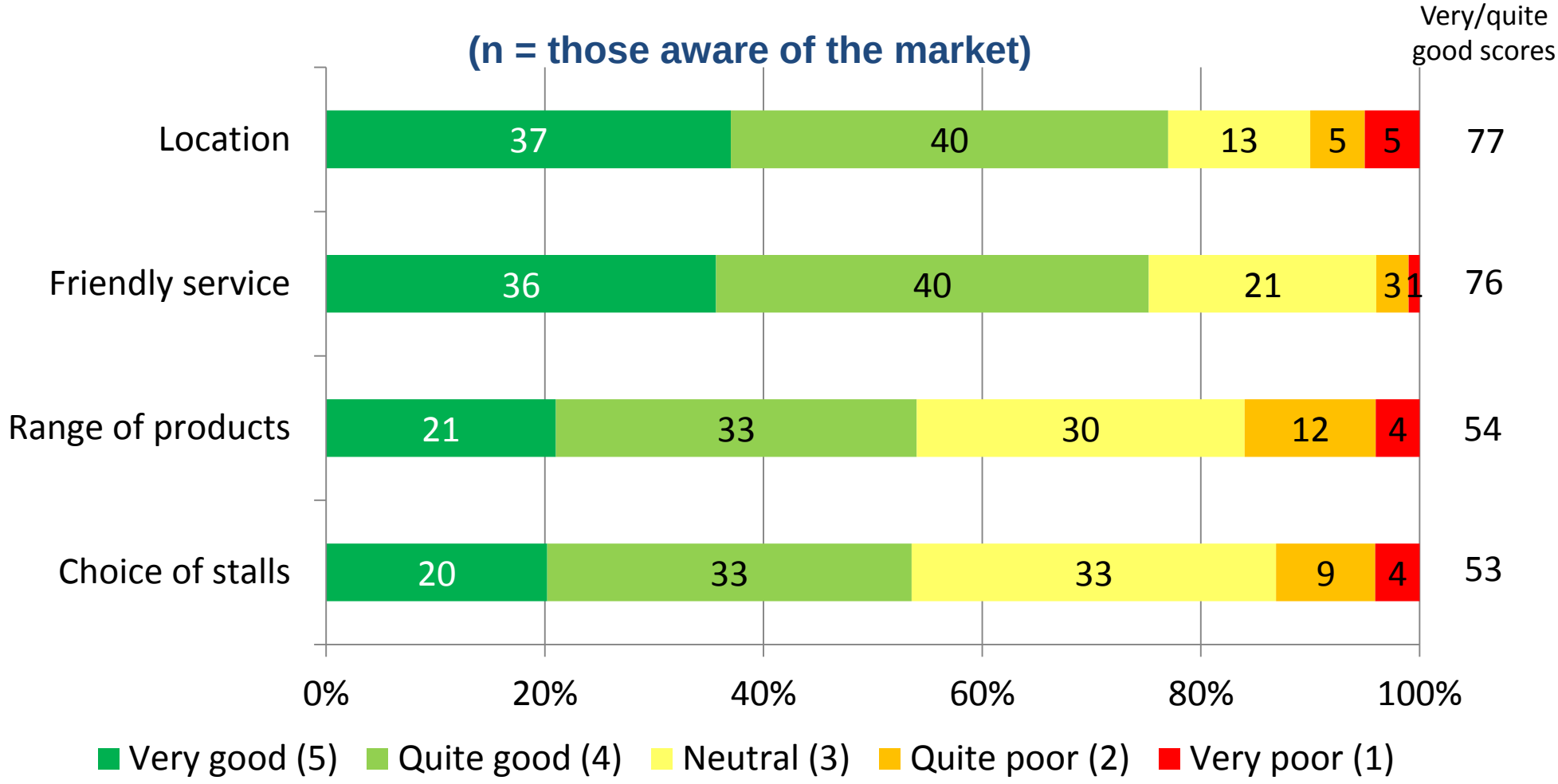
Market Ratings (Spring 15)

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



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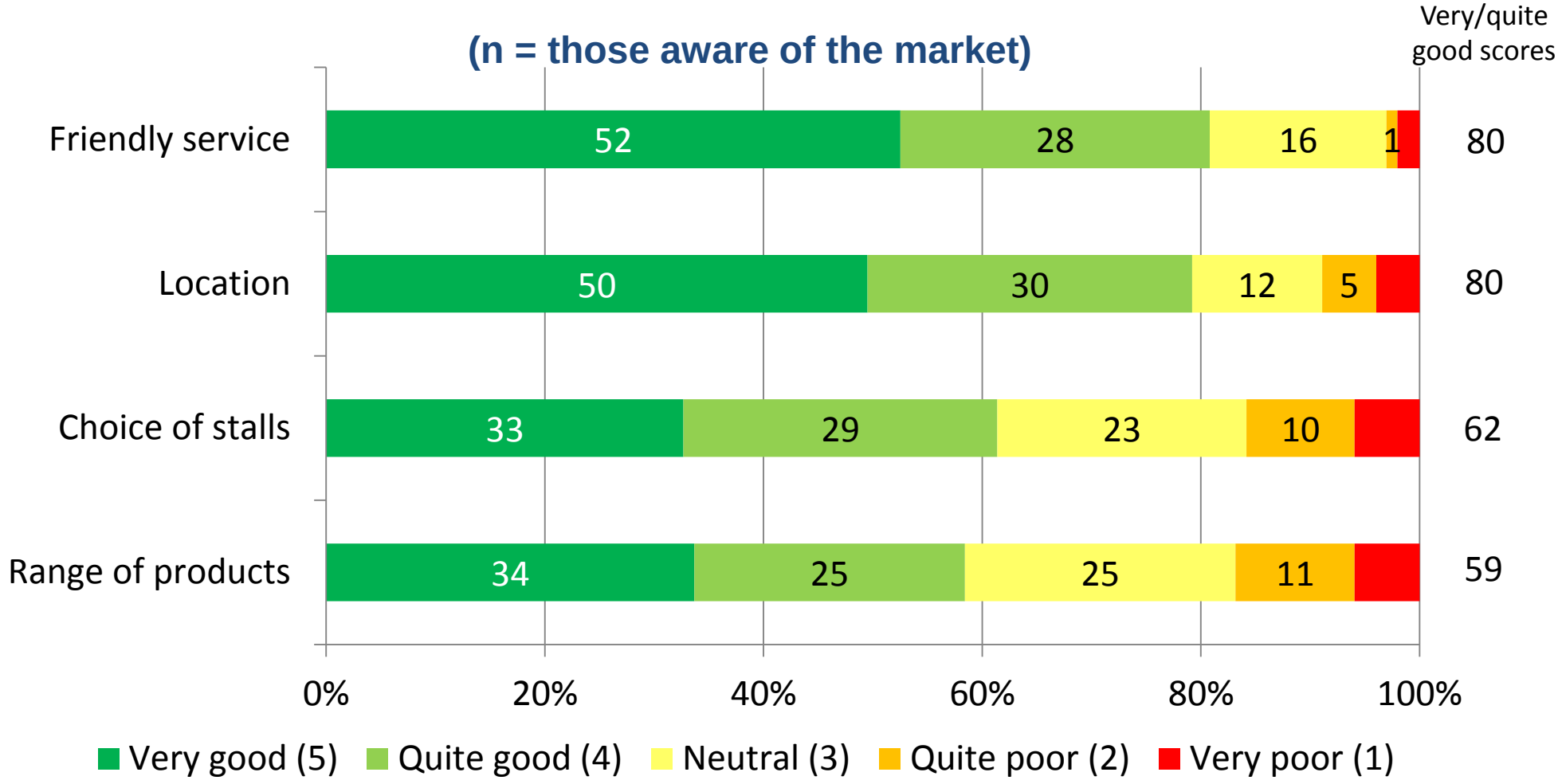
Market Ratings (Spring 13)

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

(n = those aware of the market)



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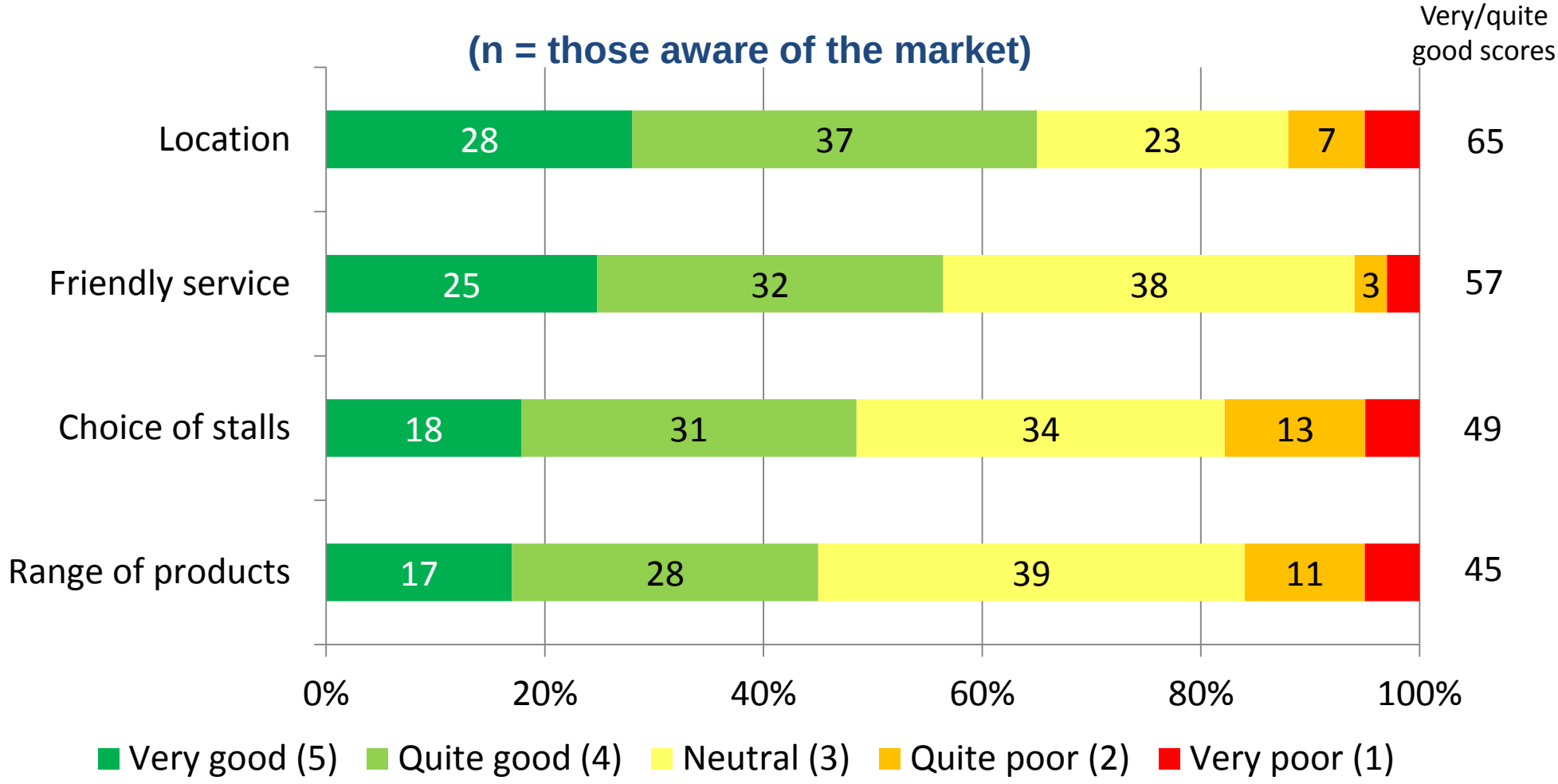

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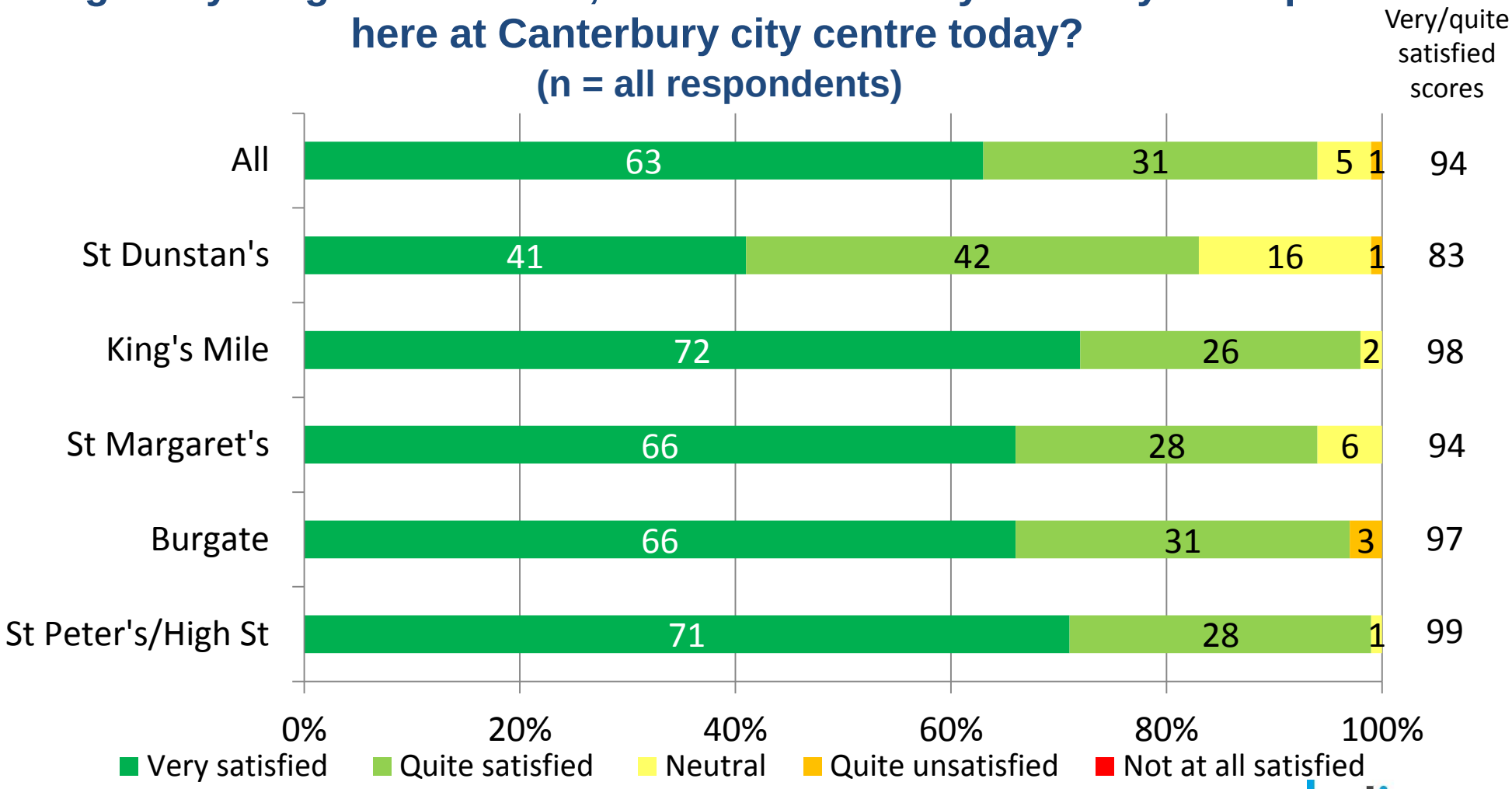
Overall satisfaction (Spring 15)

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



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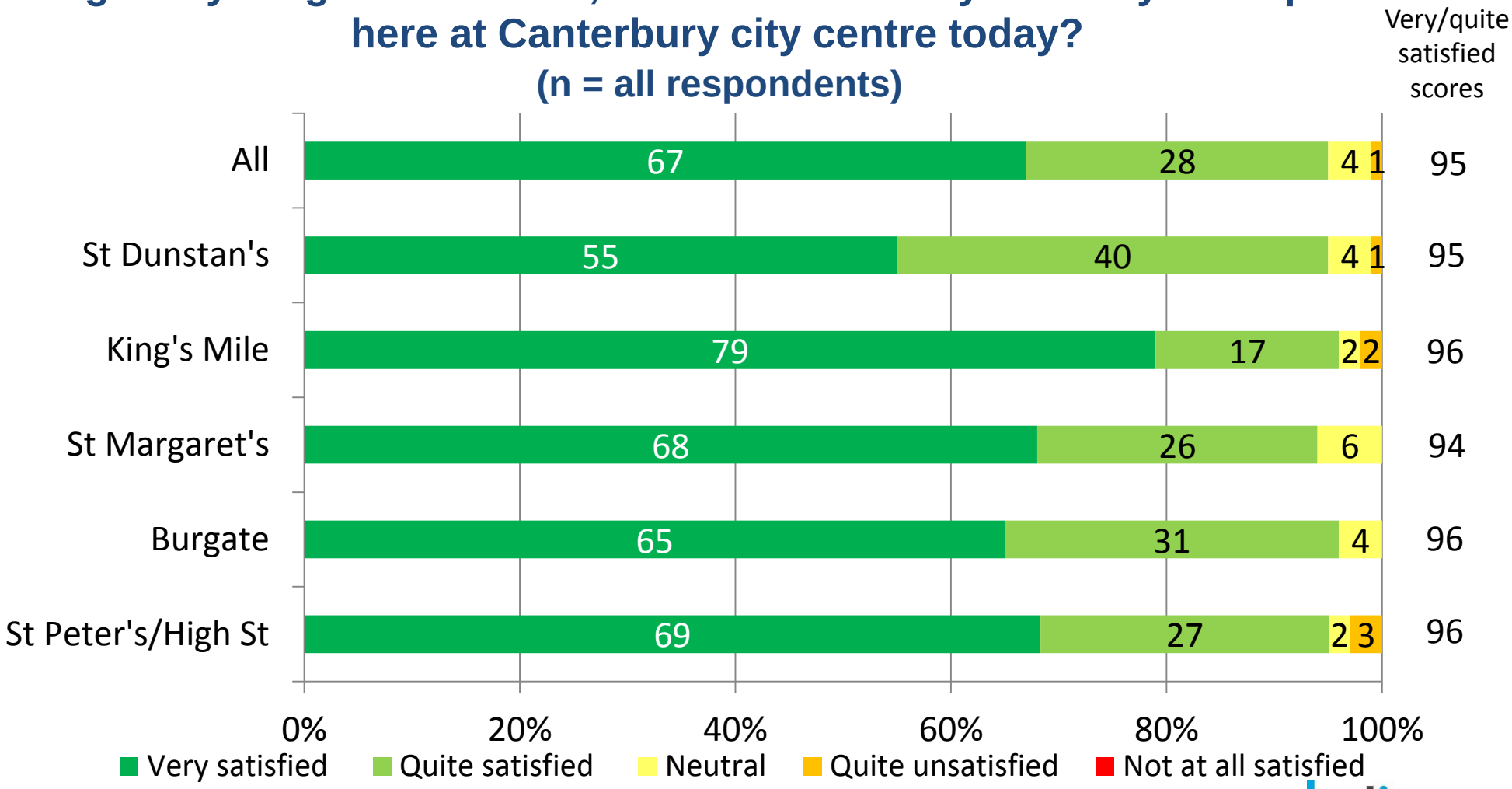

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Taking everything into account, how satisfied are you with your experience here at Canterbury city centre today?

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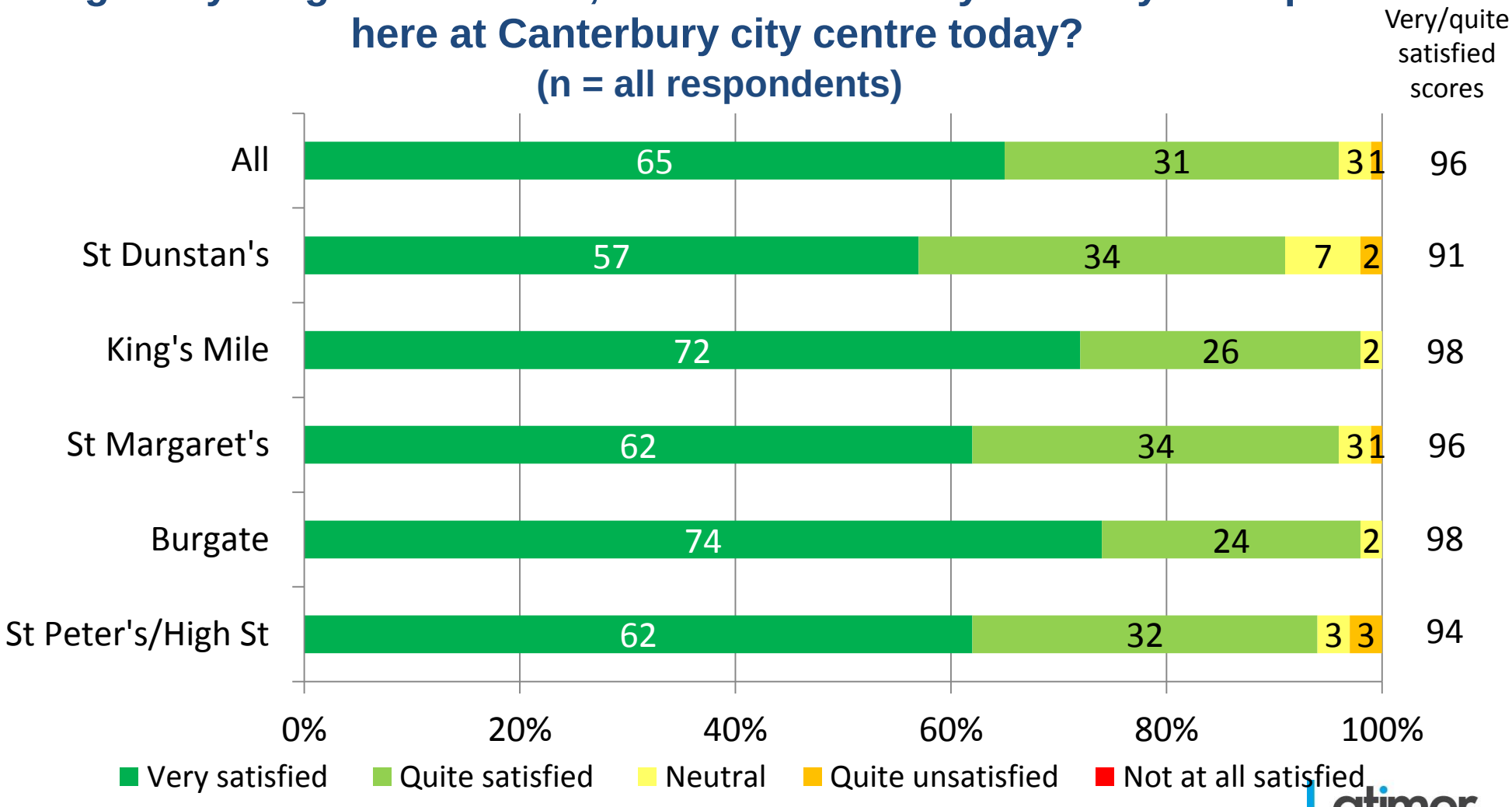

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Retail Mix Changes

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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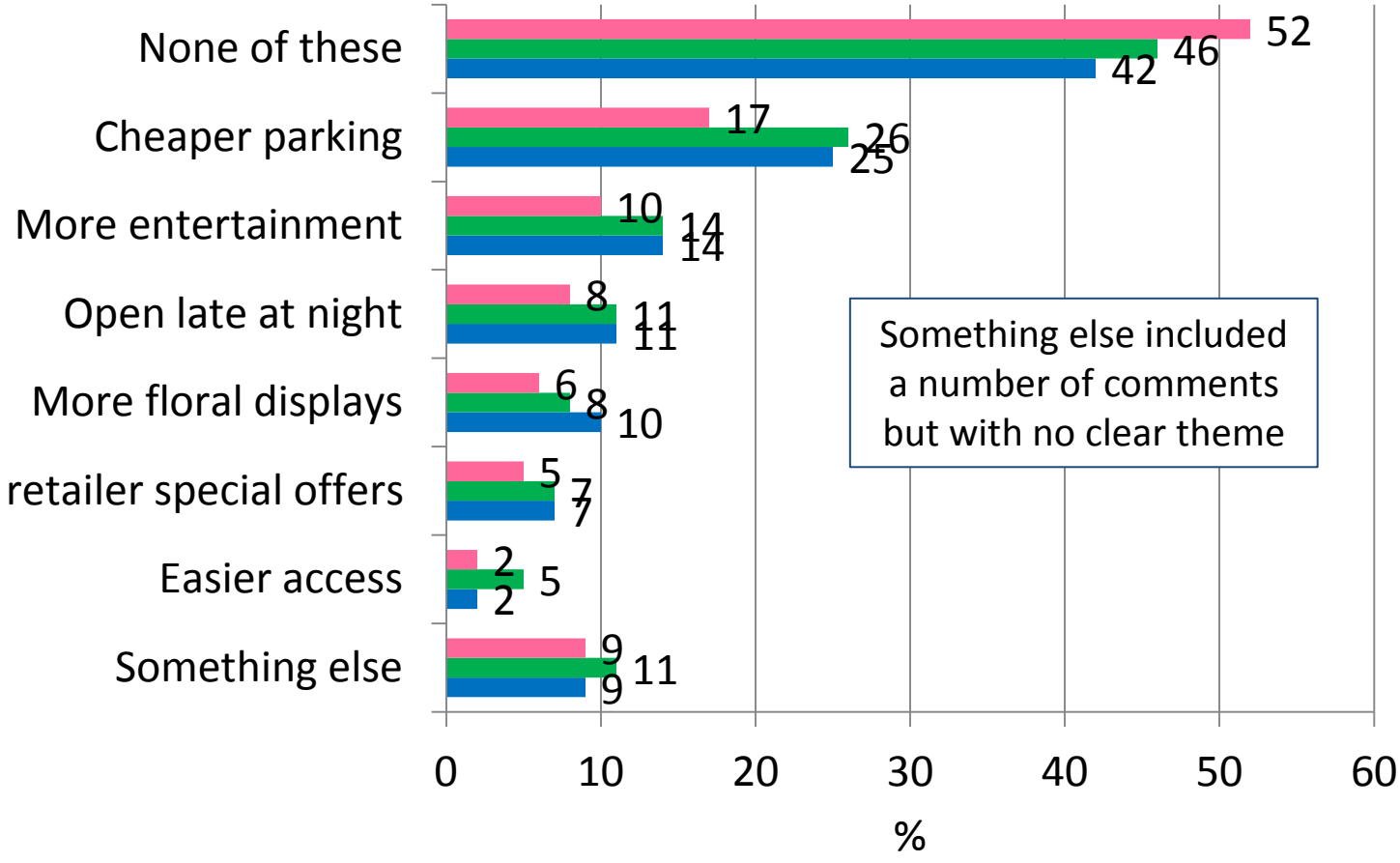
Service-related Changes

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 number of comments but with no clear theme

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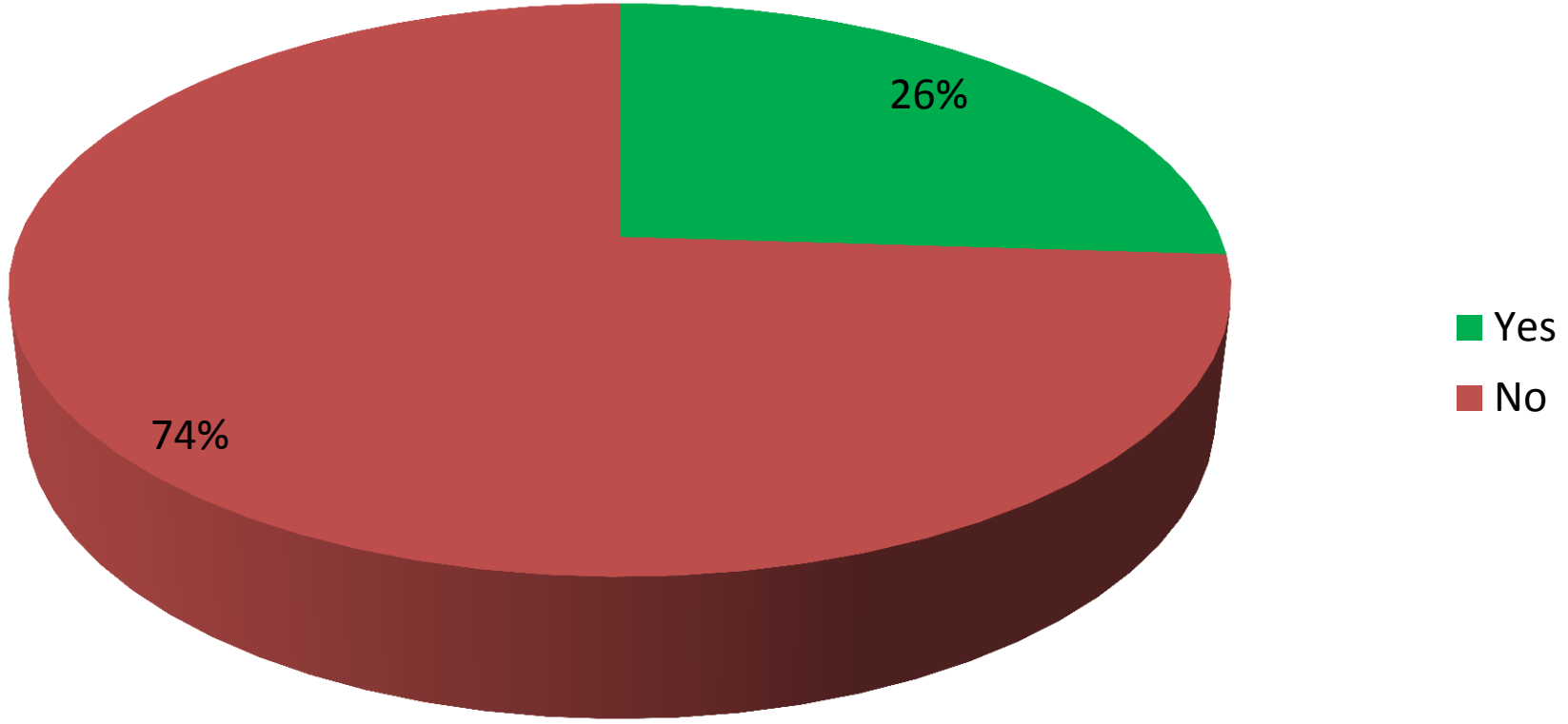
MyCanterbury

Have you heard of MyCanterbury?

(n = all respondents)



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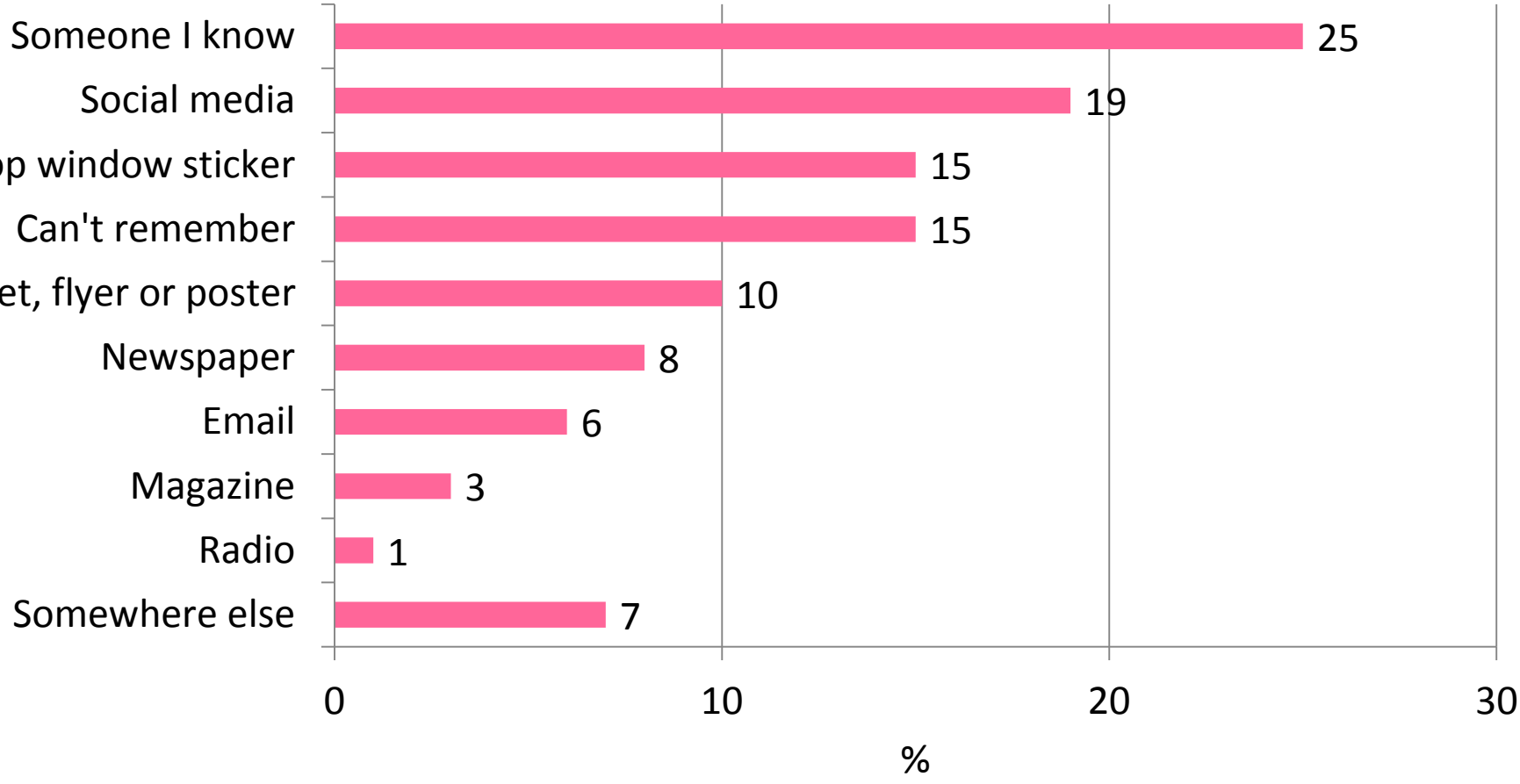
MyCanterbury communication

How have you heard of MyCanterbury?

(n = those aware of MyCanterbury)



Note: Question allowed for multi-response

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