Canterbury City survey Report 2021

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Fieldwork dates:	**20th July – 25rd July 2021**
Report date:	**2nd August 2021**

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Background and Methodology

Latimer Appleby was commissioned by Canterbury Business Improvement District 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 research that has been carried out every two years, using the same methodology and approach.

Fieldwork took place between 20th and 25th July 2021, to achieve a total sample of 362 interviews across the five sampling point locations. Note that due to Covid-19 the fieldwork dates are around one month later than previous surveys.

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Key Findings

1. Our 2021 sample once again shows a typical female skew (56%). We do know this is less accentuated than we might expect from a typical ‘shopper’ survey, it is however quite consistent with our previous surveys here at Canterbury.
2. In age terms, the latest profile again peaks at the “extremes”, with the ‘over 65s’ making up 27% and those aged ‘under 25’ accounting for 20% of our respondents this time. However, we have a higher proportion in the ‘25-34 years’ age group (19%) than previously, which may reflect the timing of the fieldwork.
3. Social grade shows a large fall in the proportion of ABs (now just 21%) although ABC1s taken together still account for around half of all respondents (49%). The big increase this time is in the proportion of DEs (36%).
4. Party size (1.4) is slightly reduced once again, and may reflect new social distancing habits leading to smaller groups.
5. Looking at the demographics across the five sampling points, we can see the gender profile does again show some minor variances, with more males in St Dunstan’s (54%) than elsewhere, but otherwise this looks stable across our localities.

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Key Findings

6. The age profiles once again also show variances between the different locations, with more ‘under 25s’ being interviewed in St Margaret’s (28%) than elsewhere, and a higher proportion of those aged ‘over 65’ in St Peter’s/High Street (35%) than elsewhere. However, as in previous years, we have a good representation of different age cohorts across all locations.
7. In social-economic grade terms, St Margaret’s and St Dunstan’s have higher proportions of ABC1s than our other areas, whilst St Peter’s/High Street has the highest number of DEs. Otherwise once again we can see a good mix of social grades across all locations.
8. Across the total sample our 'locals' (72%) made up a much larger group than all our previous surveys, and this was reflected across all sampling points. An even bigger proportion were interviewed in St Peter’s/High Street. Interestingly, we had far fewer students than previously – this may reflect the timing of the fieldwork (late July) but also we interviewed nobody who was working in Canterbury. This may be more a reflection of changes in working habits due to the pandemic.
9. In total 41% were 'employed full time', which is similar to our previous findings. Those who were ‘retired’ made up our next biggest group (28%) and in fact the profile this year does not look out of line with our past research. Across our sample points the more interesting variances were the higher proportion of ‘full-time homemakers’ in St Margaret’s and a larger number of full-time workers in King’s Mile, with fewer ‘retired’ in St Margaret’s or in Burgate.

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10. Those who were out 'alone' (61%) on the day of their interview were again our largest group, but the result was well within the range we have seen previously. We met fewer ‘with partners’ (14%) than before, and only a tiny minority were out ‘with partners and children’.
11. Those who were ‘alone’ were more prevalent in St Peter’s/High Street and St Dunstan’s (both over 70%) than in other areas, with the lowest proportion of those ‘alone’ being found in King’s Mile (49%).
12. Average travel time (34 minutes) was at the upper end of our range, but was actually not significantly different from 2019’s result (35 mins).
13. In terms of travel mode, those 'walking' once more made up our biggest group (48%), and this was the largest proportion we have seen to date – and most likely reflects the proportion of locals this year. ‘Car’ use (32%) appears more consistent with previous results, but ‘bus’ use (8%) was at the lowest level we have seen, again this may reflect hesitance to make use of public transport at this time. ‘Park and ride’ use was negligible.
14. Travel mode profiles are again similar across our 5 sampling points, although ‘car’ use peaks amongst those interviewed in King’s Mile.

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Key Findings

15. Whilst we might have expected more shifts in behaviours as a result of the virus, the proportion shopping in Canterbury on the day (89%) was actually at its highest level to date, and this peak was seen across all 5 sampling points.
16. For those actually shopping on the day of their interview, the average length of time spent shopping (141 minutes) was also an increase from 2019, and in fact was identical to the 2015 survey result. This again marks 2017 out as a bit of a 'blip' in our data series.
17. The proportion who said that they ever shop for non-foods in Canterbury increased up to 90% this year, after the big drop we saw in 2019. This bounce back is visible across most of our interviewing locations, with the exception being Burgate, whilst King's Mile again had the lowest proportion. This is again likely to be a reflection of the higher proportion of locals in our sample.
18. The number who say that they ever shop for groceries in Canterbury city centre (63%) also increased this year, this comes after the fall we saw in 2019. The results by location show a common trend, with the one exception of King's Mile.
19. The story is actually consistent again for the numbers who say they ever visit Canterbury for entertainment reasons. The figure was up to 90% this time, showing good growth vs 2019, and at a similar level to both 2013 and 2017. This growth was apparent at all sampling points.

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Key Findings

20. Following the rise in those who ever shop for non-foods, the average visit frequency for those that actually do shop (56 visits p.a.) increased to its highest level ever. This growth was however not reflected in all sample points, with falls in Burgate and King's Mile compared to last time.
21. The average visit frequency for grocery shopping in the city (75 times p.a.) fell slightly vs. last time, but is once again within the range of results we've seen. Results across the locations do however show both rises and falls, the largest increase being in St Peter's/High Street and the largest fall being measured in Burgate.
22. The average visit frequency for entertainment in the city does show a decline, down to 30 trips per annum. This is the lowest we've seen, and with the one exception of St Peters/High Street, this shift is apparent across all our sampling points. Does this again point to the impact of Covid restrictions?
23. We again explored the main reason for visiting Canterbury on the day of the interview. As before we have quite a range of responses. Our largest group were 'just browsing' (18%), ahead of those doing general 'non-food shopping' (15%) and with 13% either 'meeting friends', or 'visiting a particular shop'. 12% were in the city centre 'on holiday'. No other group accounted for more than 10% of respondents. There were some differences across sampling points, although this was less marked than last time.

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Key Findings

24. Exploring purchases by category, non-food conversion (51%) saw an increase after the fall that we saw last time. There were also some quite large shifts at our different sample points, with good growth at St Dunstan's and St Margaret's.
25. Grocery conversion (29%) also rose vs. 2019 but this is actually in line with our 2017 survey, and the range of results is actually quite narrow. This goes from 25% in St Margaret's up to 34% in St Dunstan's.
26. Entertainment conversion however jumped sharply in this survey, up to 58% and the trend was consistent across the board.
27. Non-food average party spend (£25.79) fell sharply this year, not helped by the smaller party size and despite non-food conversion holding up well. By contrast, grocery spend (£15.70) looks quite typical of previous years, and actually shows a good growth over 2019. Entertainment spend (£18.33) has fallen slightly, but actually shows no significant movement from 2019.
28. Once more we explored where shoppers would have made their purchases today if they had not made them in Canterbury. 60% claim to only shop in Canterbury – and this is at the higher end of our range, no doubt reflecting the higher proportion of locals in our sample this time. 30% would have used their local town. As a result, all our other named destinations or locations generated minimal percentages.

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Key Findings

29. As in previous research, we looked at ratings for the city centre across a number of criteria and this year made some minor changes to some descriptors. Scores this year were extremely positive across most measures, arguably some of the highest ratings we have ever seen at Canterbury. Six generated very good/quite good % scores in the 90s, and another three had scores into the 80s. Interestingly, the ‘choice of shops’ score appears very consistent over the period of our research. Our weakest criteria this year were ‘mobile phone connectivity’ and ‘public Wi-Fi network’.
30. We looked in more detail in this research at both Public Wi-Fi and Mobile phone connectivity. For both, around 40% of respondents felt both of these factors had an impact on their visits to Canterbury, the least influence was on where they chose to park.
31. As in previous waves we also looked at several ratings specifically at the five sample points/areas.

    'Choice of shops' scored 86% overall (very good/quite good) which was again well up vs. last time. Our highest scoring areas this year were Burgate and King's Mile.

    'Safety/security' (96%) also improved compared to last time and no areas scored below 90%.

    'Cleanliness' (91%) also showed good improvement, and the only locality of comparative weakness was St Dunstan’s.

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'Service in the shops' (94%) also rose compared to 2019 and there was little variance in ratings across our 5 locations.

‘Signposting' (89%) also showed good improvement vs our last survey. Our lowest scoring area was once again St Dunstan’s, but this is again relative to some very strong ratings this time.

32. As usual we also asked questions about the market. Yet again the higher scores were achieved for 'friendly service' (88%) and 'location' (88%), but again scores were up across the board compared to our 2019 survey.
33. Our overall satisfaction score hit 99% this time, improving further on some previously very strong results. In fact, these figures were uniformly high across all 5 locations this year, with no significant variances noted.
34. The desire for changes in the retail mix again shows little major shift across the surveys, however the most popular demand this time is for ‘more ladieswear’ ahead of ‘more homeware shops’. Demand for change in other named categories was lower than we had seen in our previous research. However once again, amongst those who would like to see changes the most common theme – within other changes (57%) – was again ‘more independents’.

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Key Findings

35. Service-related changes showed a similar pattern to previous surveys. The strongest demand was once again for 'cheaper parking' (13%), although this was down from 2019. No other factor featured for more than 10% of respondents. Otherwise, the biggest change was perhaps in the numbers stating none of these (60%).

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Gender & Age profiles

(n = all respondents)

	Spring 13	Spring 15	Spring 17	Spring 19	Spring 21	GB popn.
Male	45%	44%	46%	45%	44%	48%
Female	55%	56%	54%	55%	56%	52%
18-24 years	18%	21%	19%	19%	20%	14%
25-34 years	13%	15%	11%	12%	19%	20%
35-44 years	9%	10%	9%	11%	9%	18%
45-54 years	15%	15%	17%	13%	11%	16%
55-64 years	19%	20%	21%	15%	14%	12%
65 years+	26%	17%	24%	29%	27%	20%

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Social Grade profile and Average Party Size

(n = all respondents)

	Spring 13	Spring 15	Spring 17	Spring 19	Spring 21	GB popn.
AB	36%	25%	44%	51%	21%	21%
C1	42%	53%	34%	15%	28%	28%
C2	10%	14%	11%	11%	15%	22%
DE	12%	8%	11%	23%	36%	29%
Party size	1.6	1.6	1.5	1.5	1.4	-

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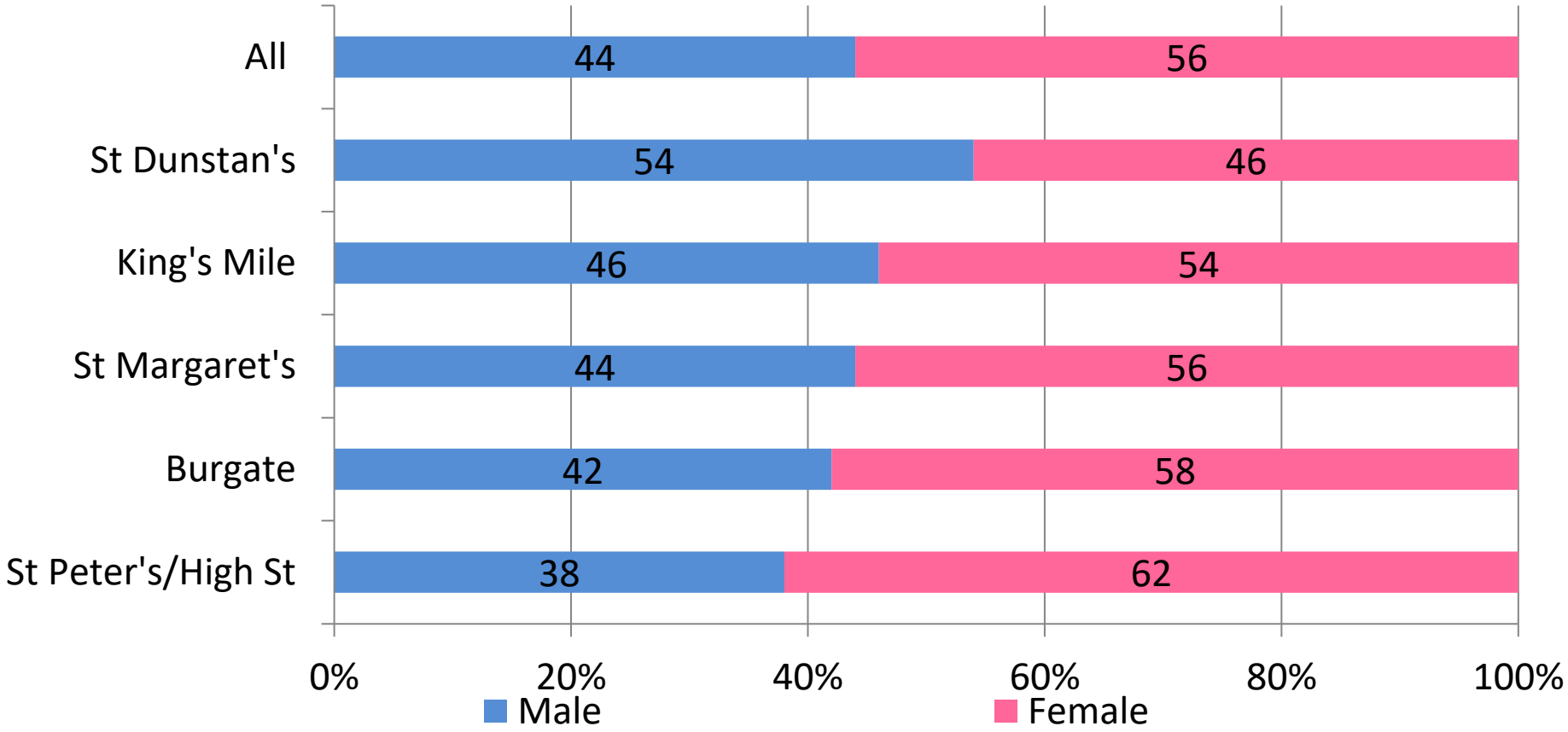
Gender profile (Spring 21)

Respondents by gender

(n = all respondents)



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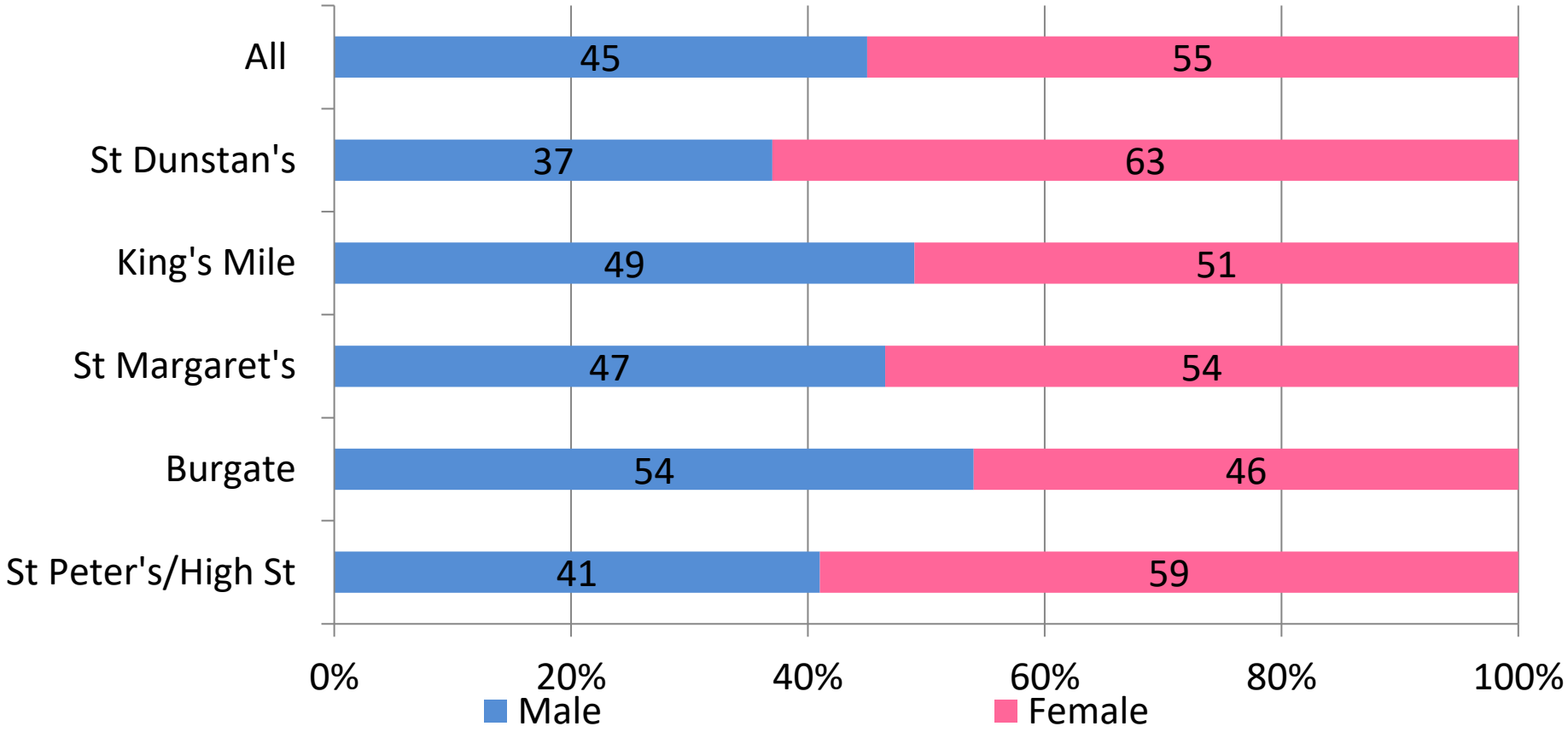
Gender profile (Spring 19)

Respondents by gender

(n = all respondents)



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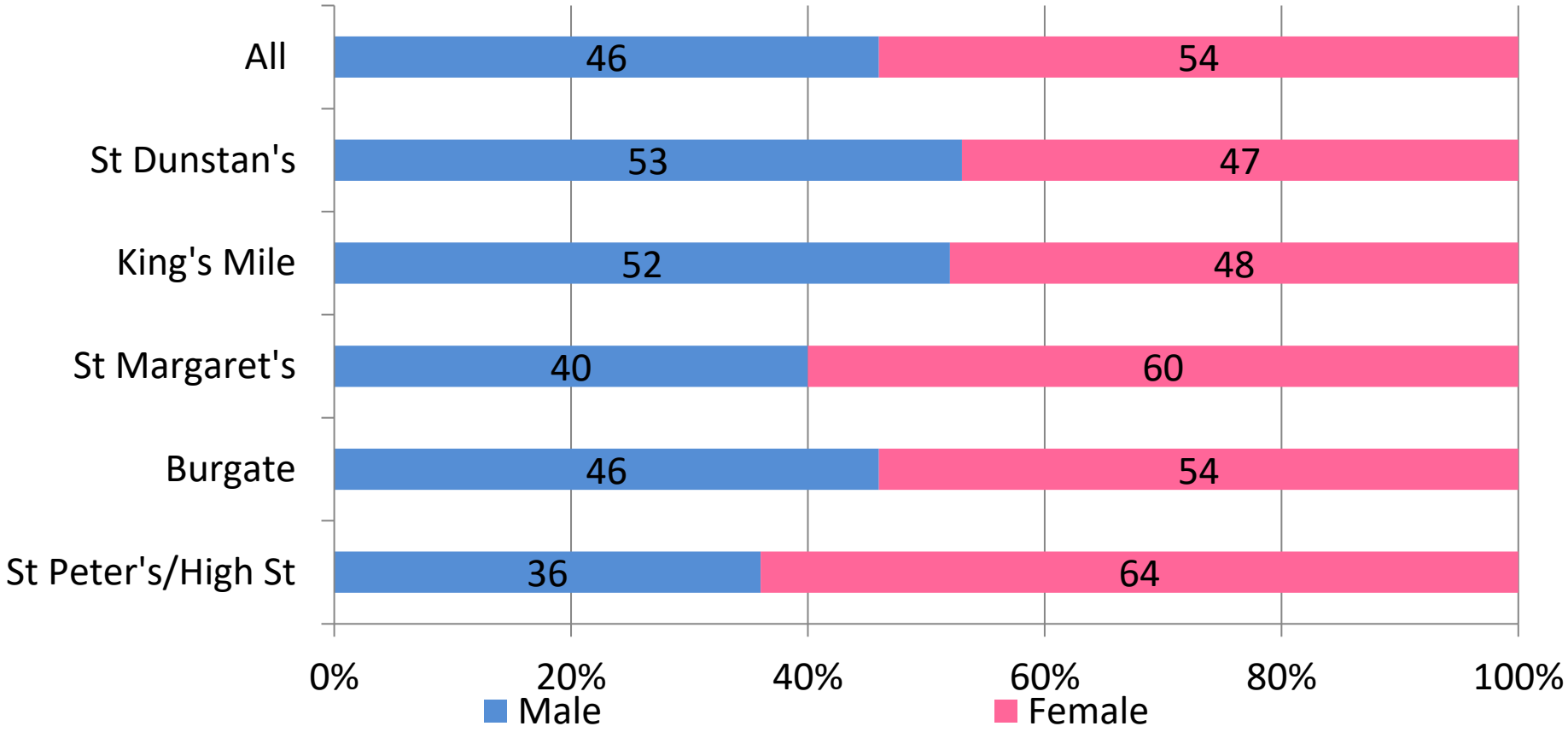
Gender profile (Spring 17)

Respondents by gender

(n = all respondents)



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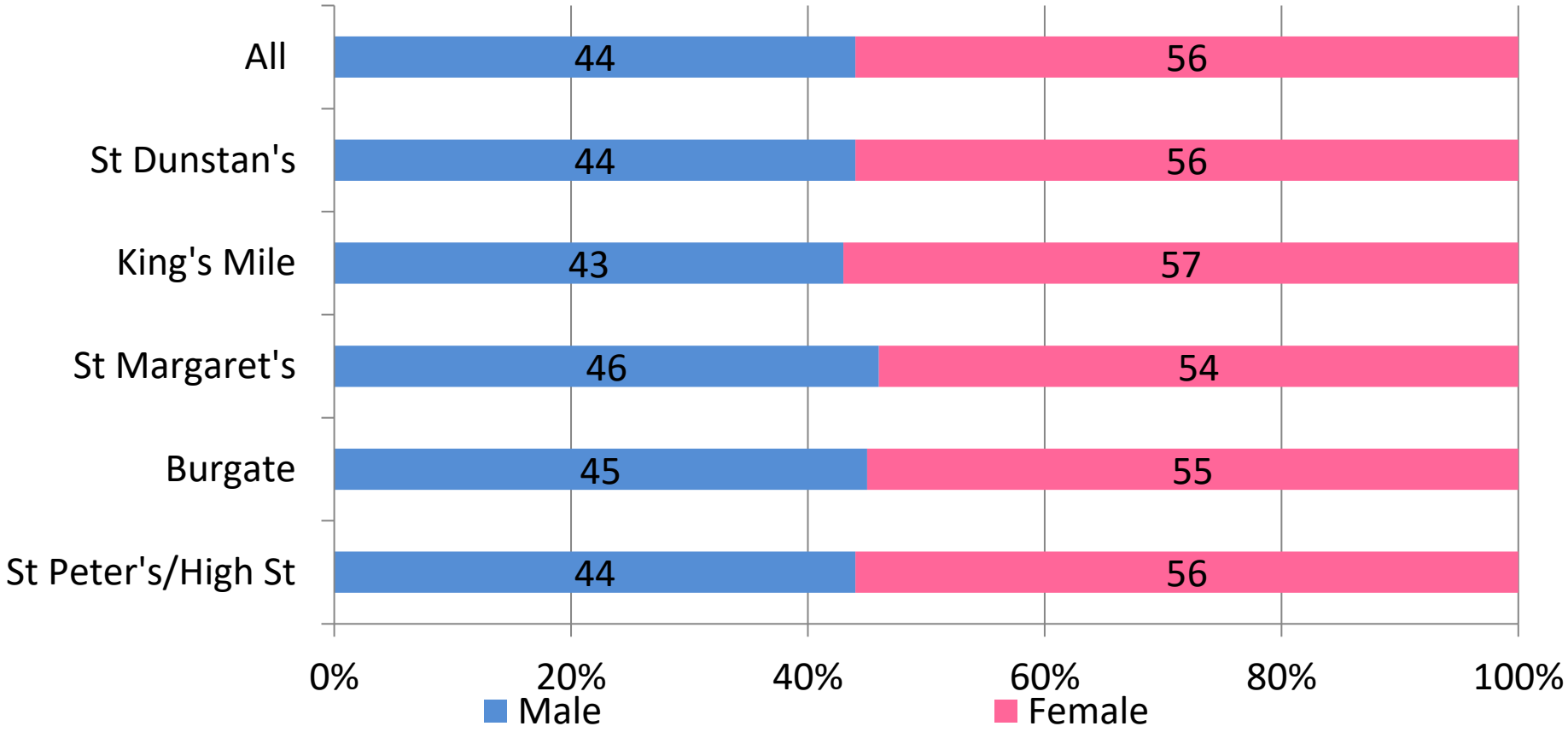
Gender profile (Spring 15)

Respondents by gender

(n = all respondents)



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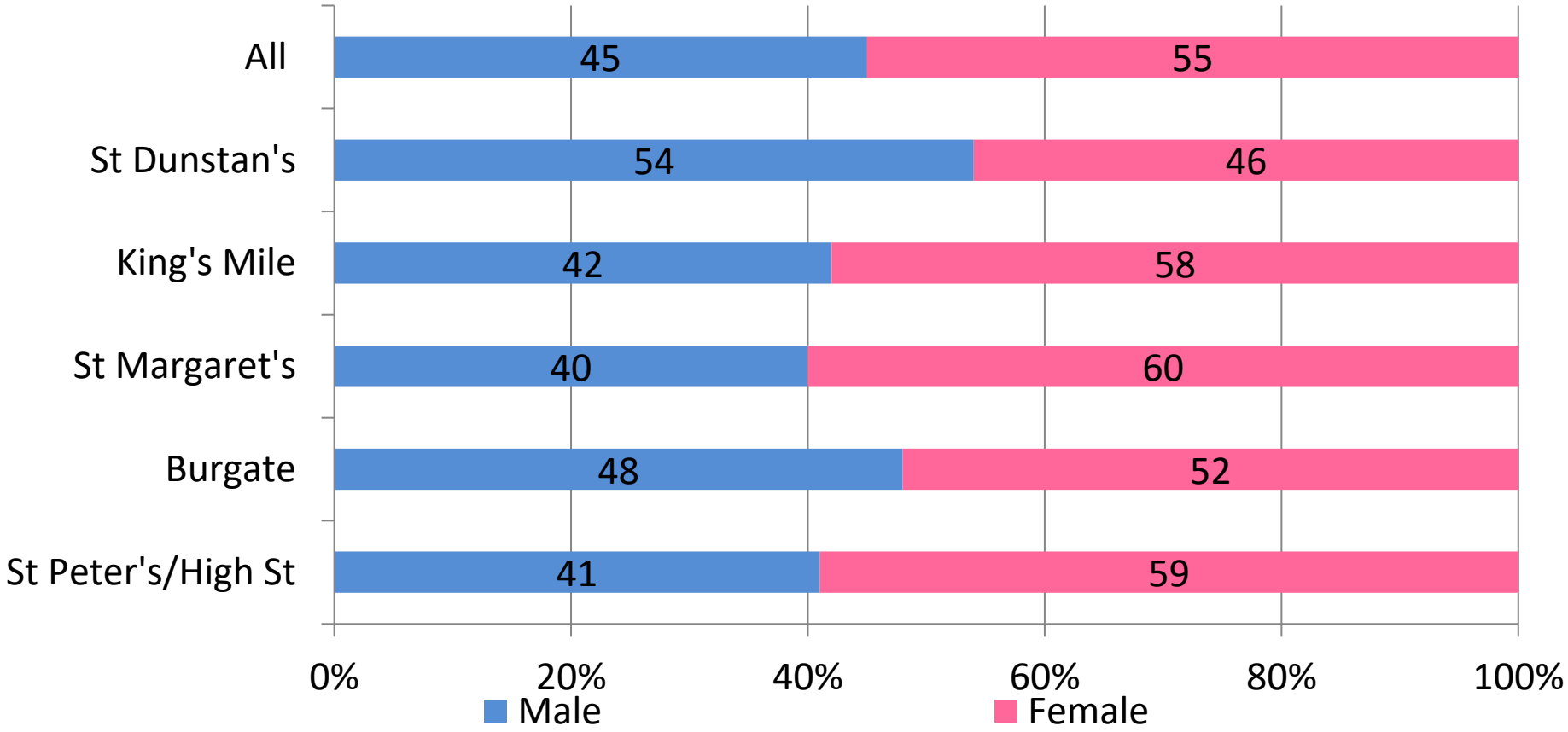
Gender profile (Spring 13)

Respondents by gender

(n = all respondents)



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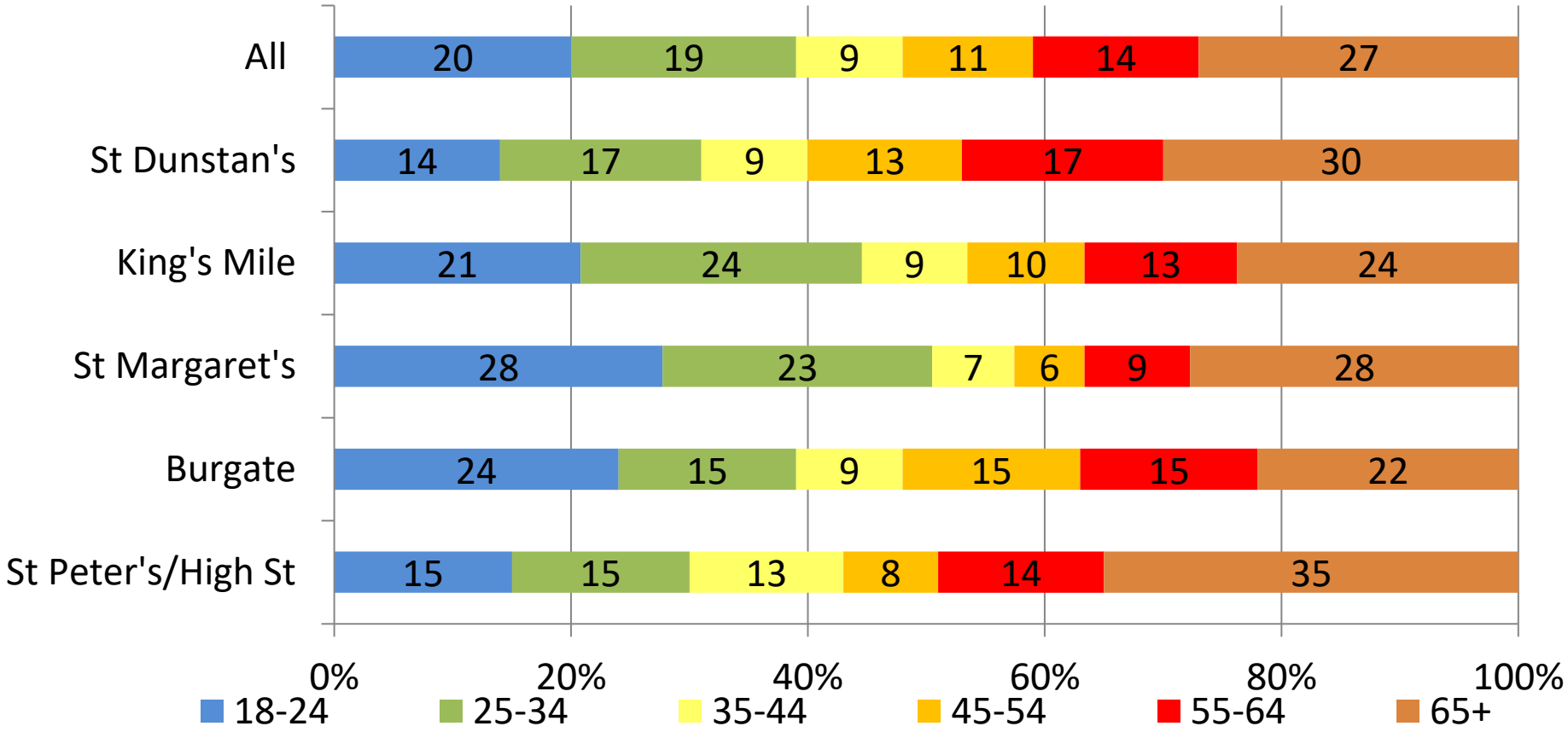
Age profile (Spring 21)

Please tell me your age?

(n = all respondents)



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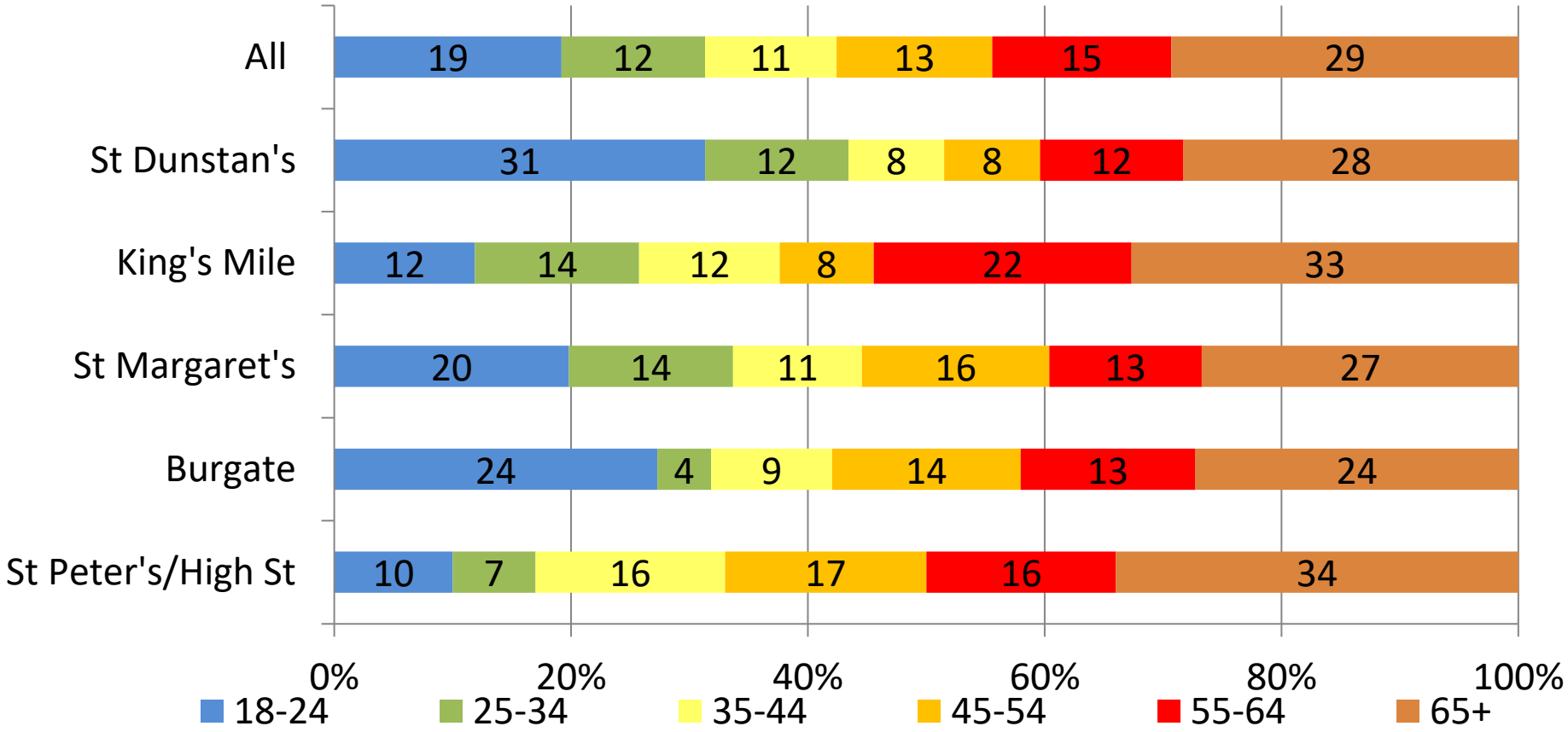
Age profile (Spring 19)

Please tell me your age?

(n = all respondents)



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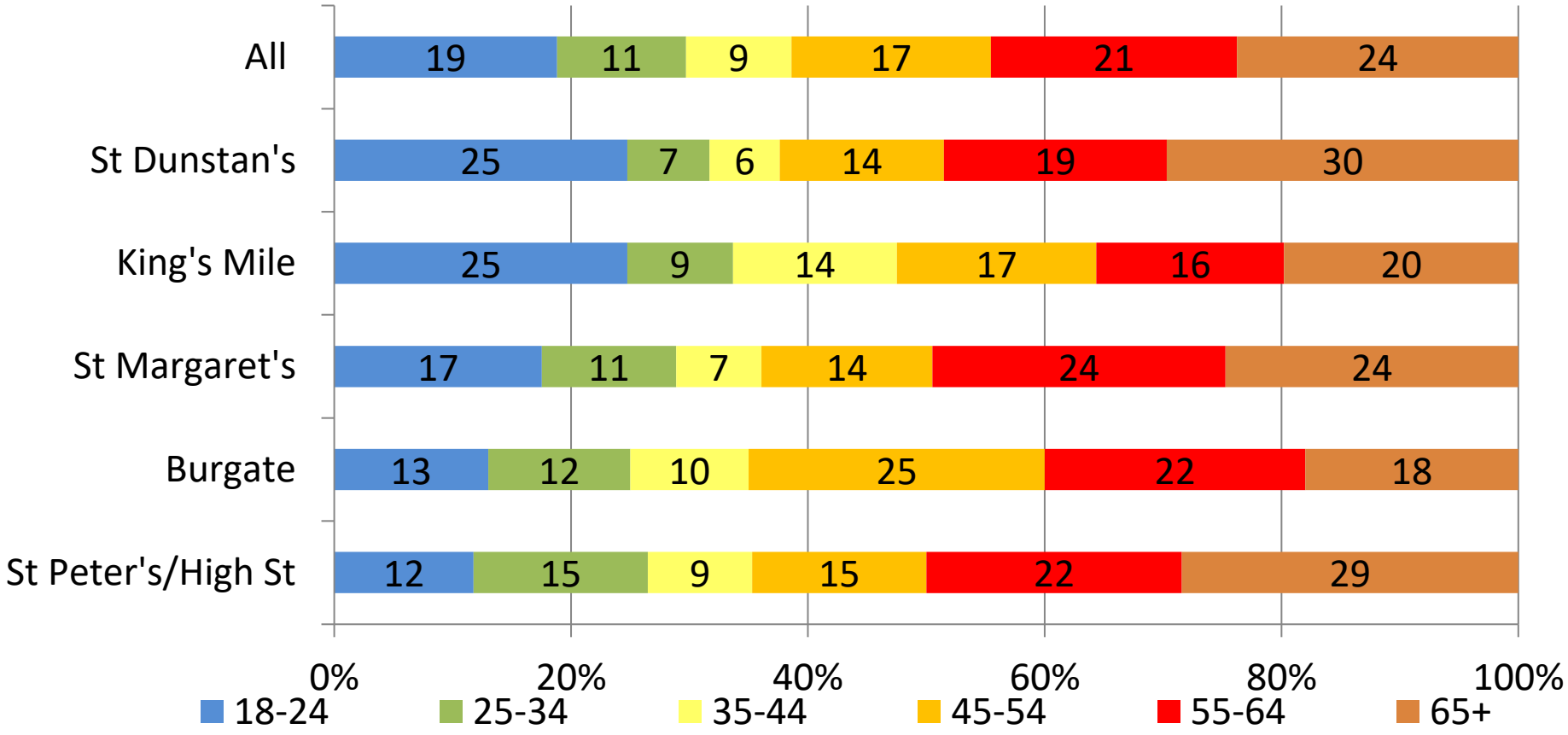
Age profile (Spring 17)

Please tell me your age?

(n = all respondents)



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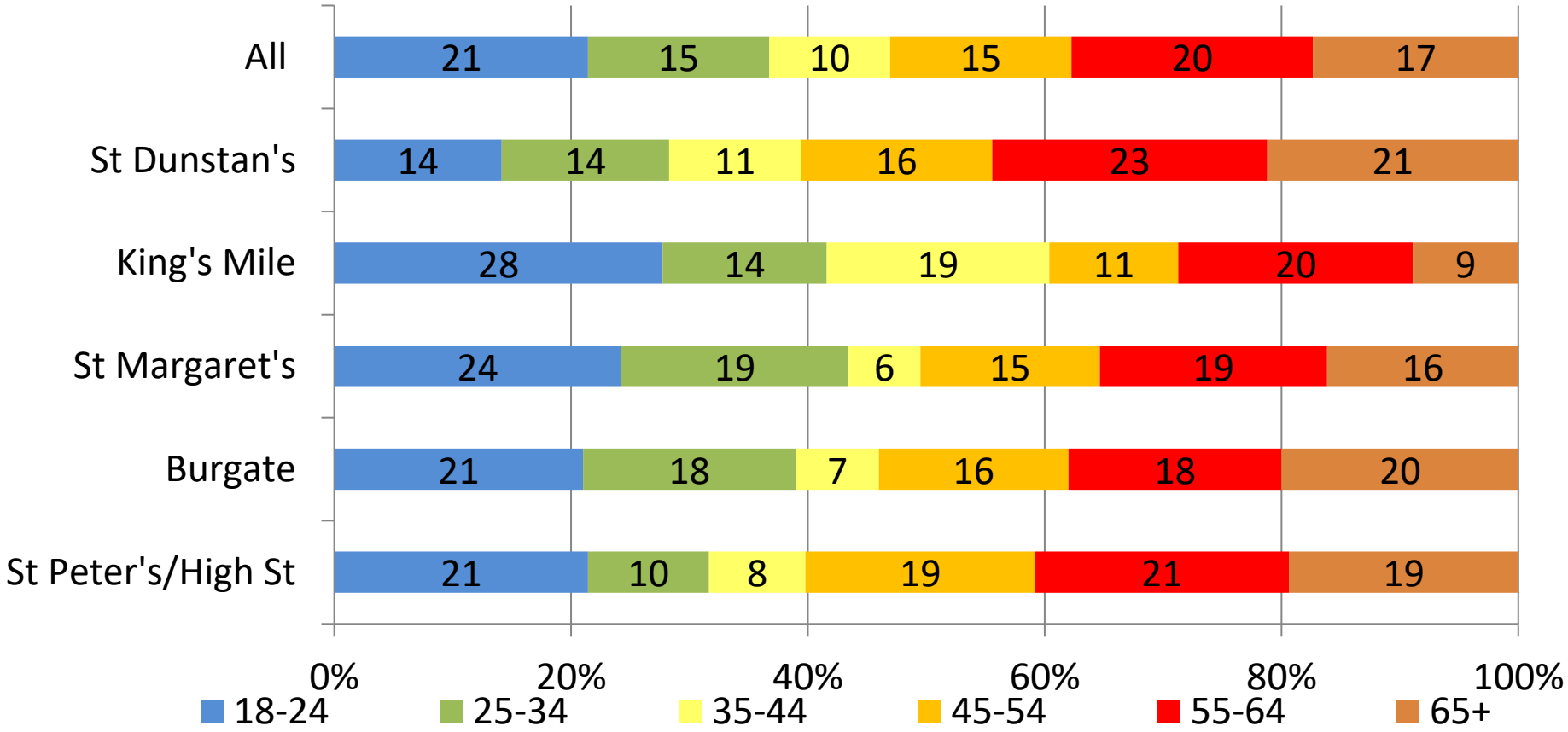
Age profile (Spring 15)

Please tell me your age?

(n = all respondents)



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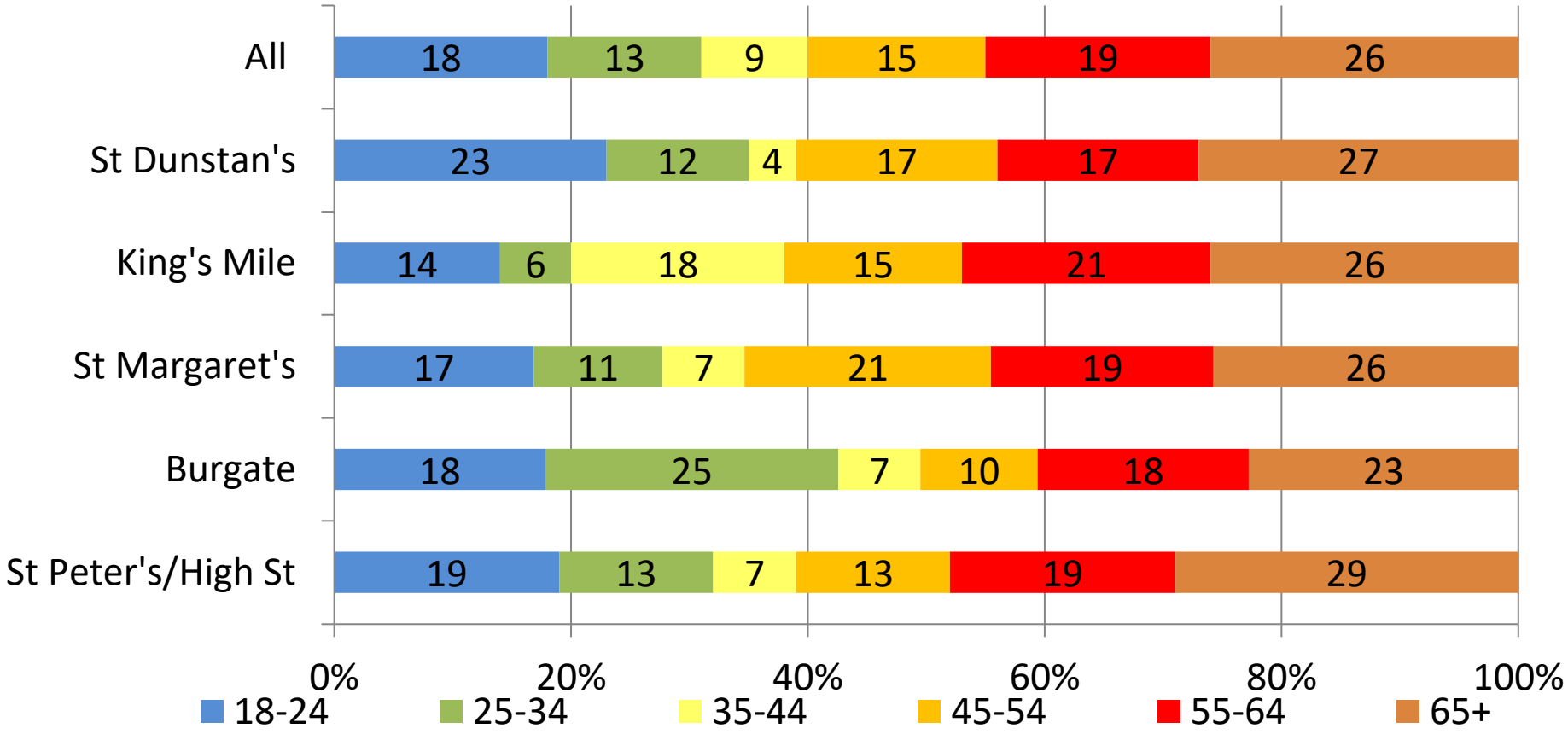
Age profile (Spring 13)

Please tell me your age?

(n = all respondents)



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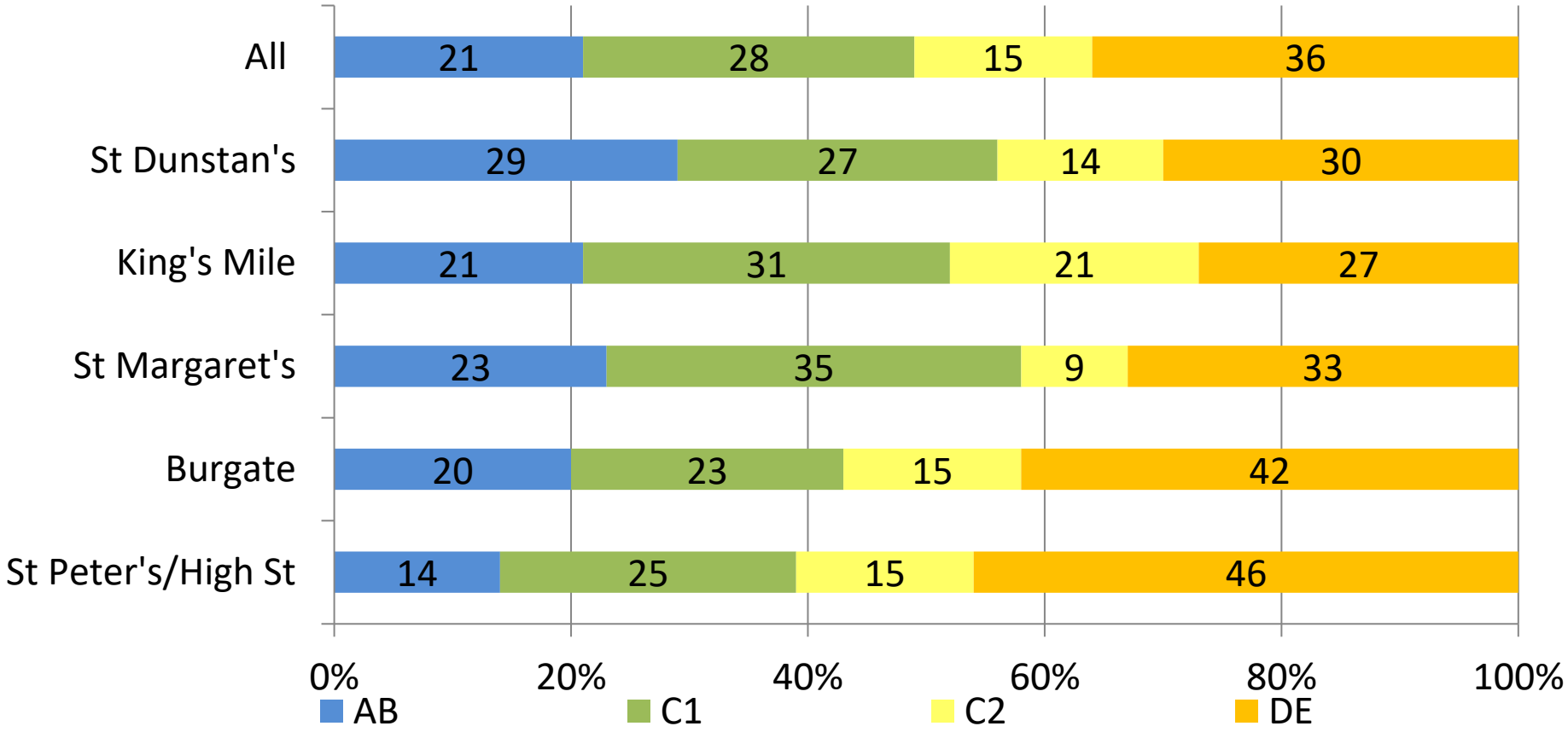
Social grade (Spring 21)

Respondents by SEG profile

(n = all respondents)



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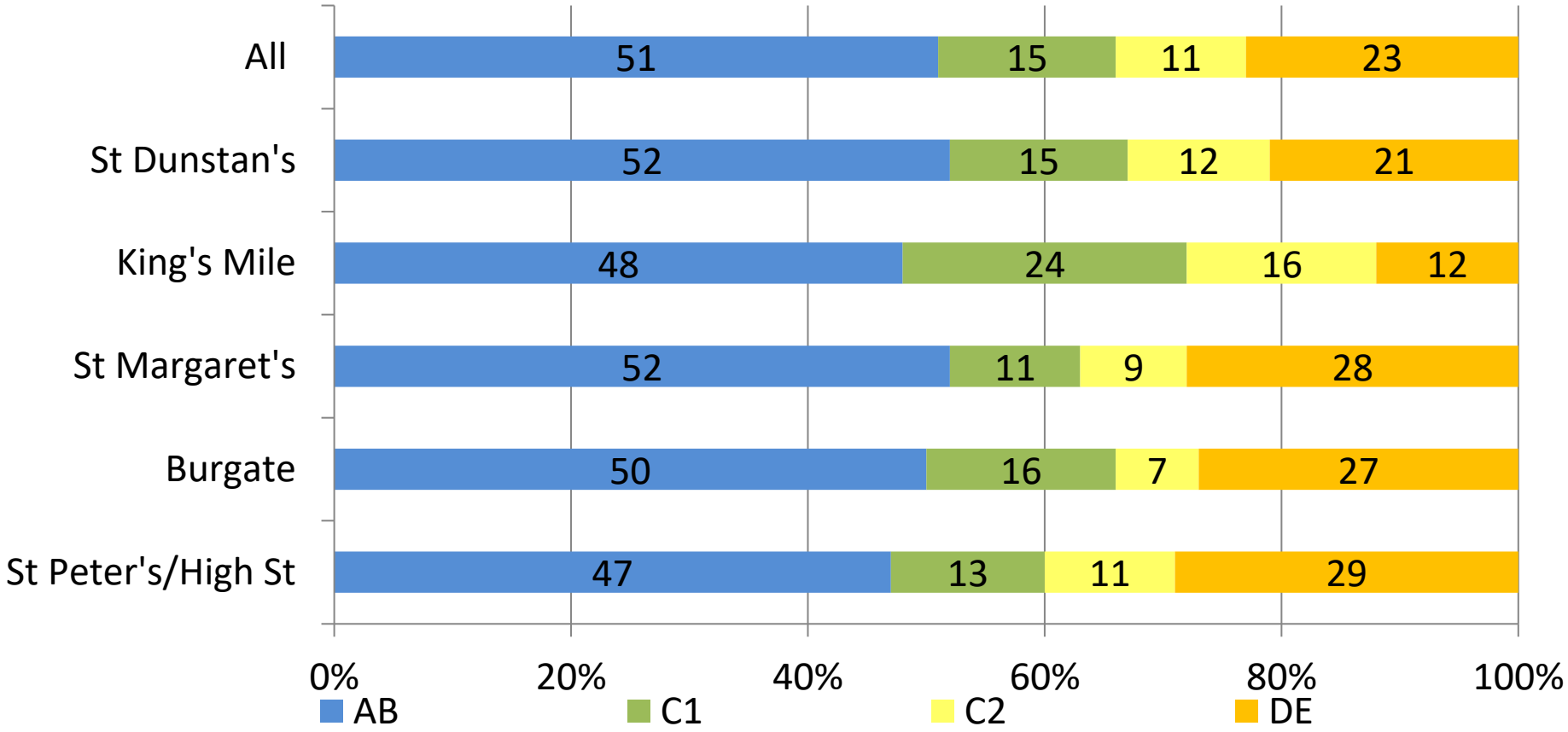
Social grade (Spring 19)

Respondents by SEG profile

(n = all respondents)



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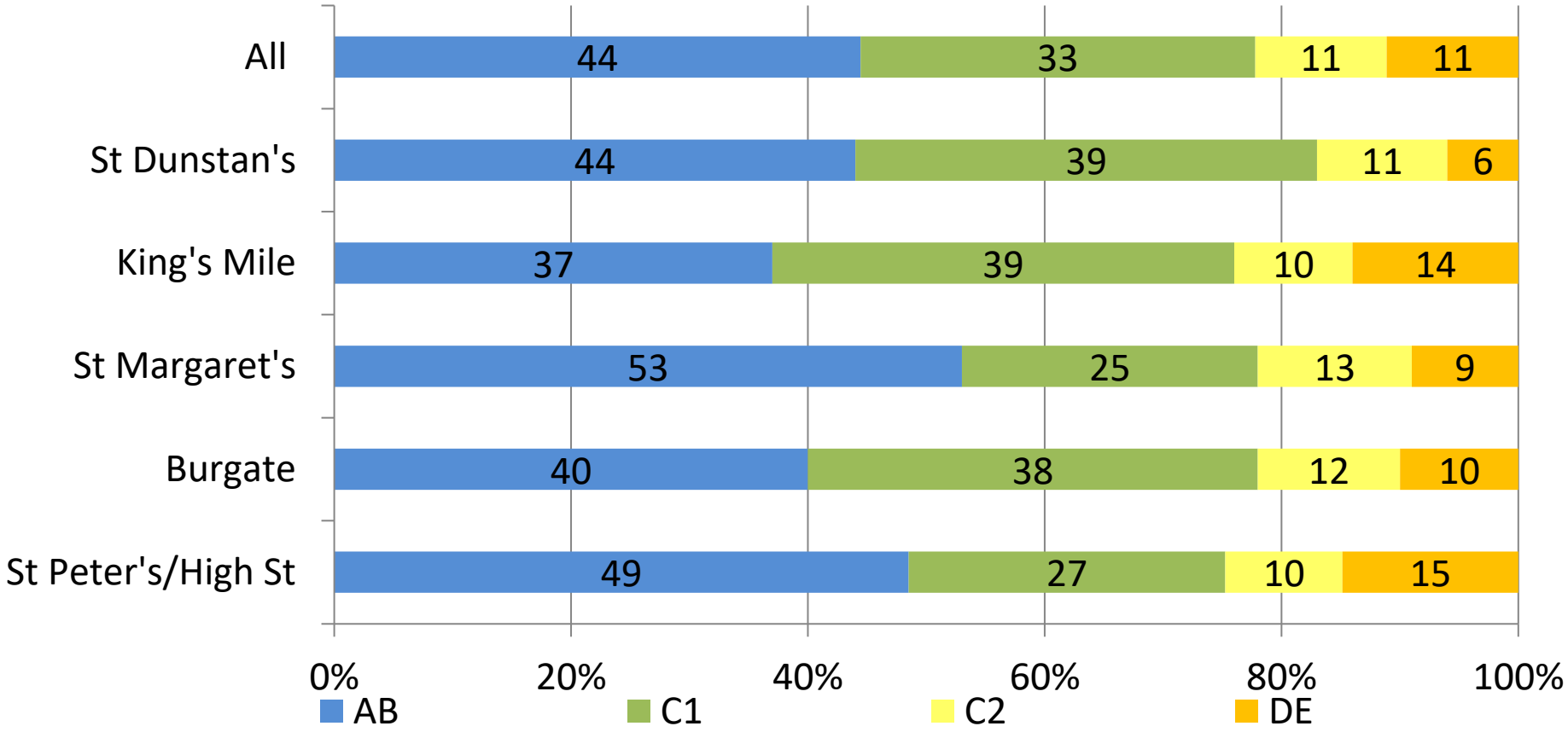
Social grade (Spring 17)

Respondents by SEG profile

(n = all respondents)



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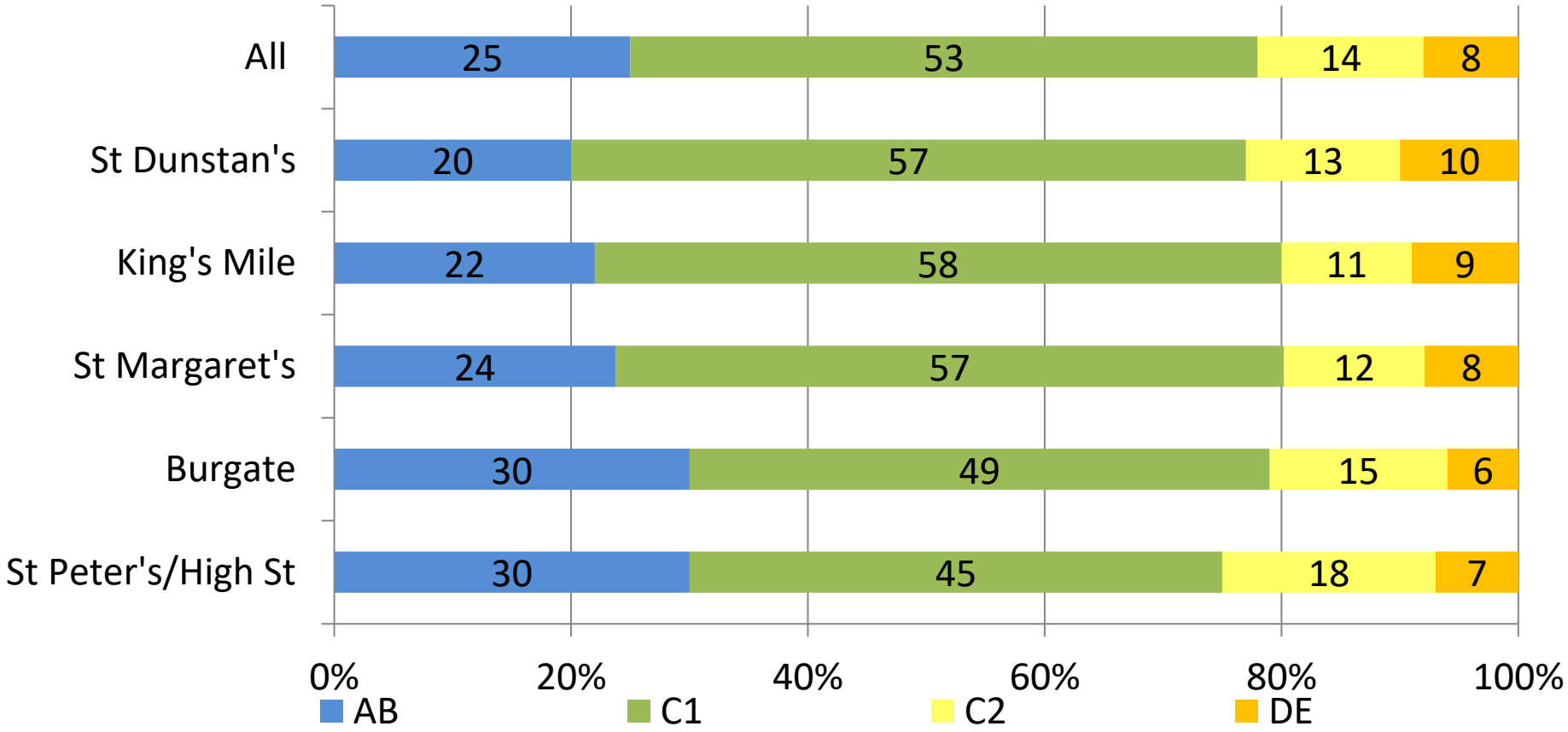
Social grade (Spring 15)

Respondents by SEG profile

(n = all respondents)



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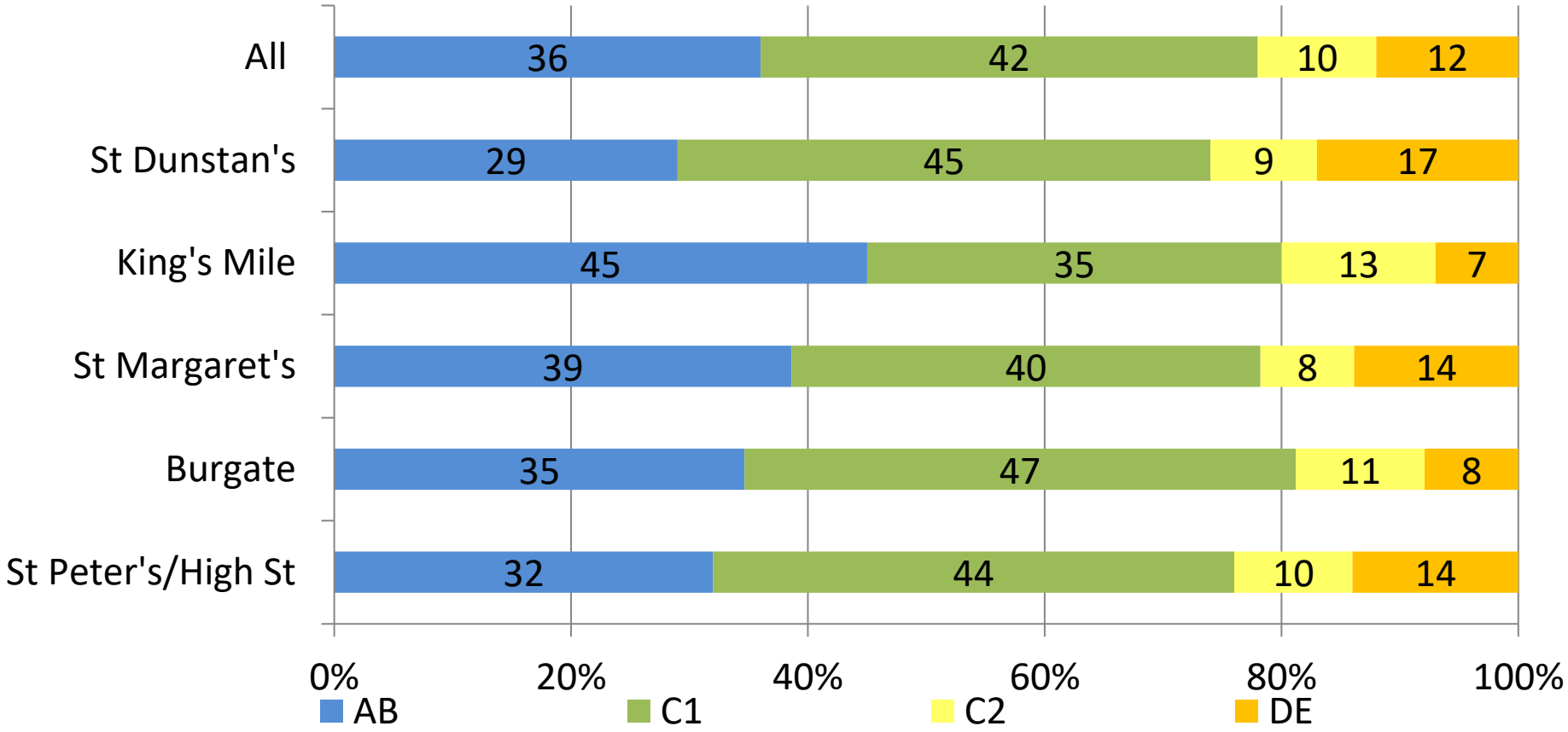
Social grade (Spring 13)

Respondents by SEG profile

(n = all respondents)



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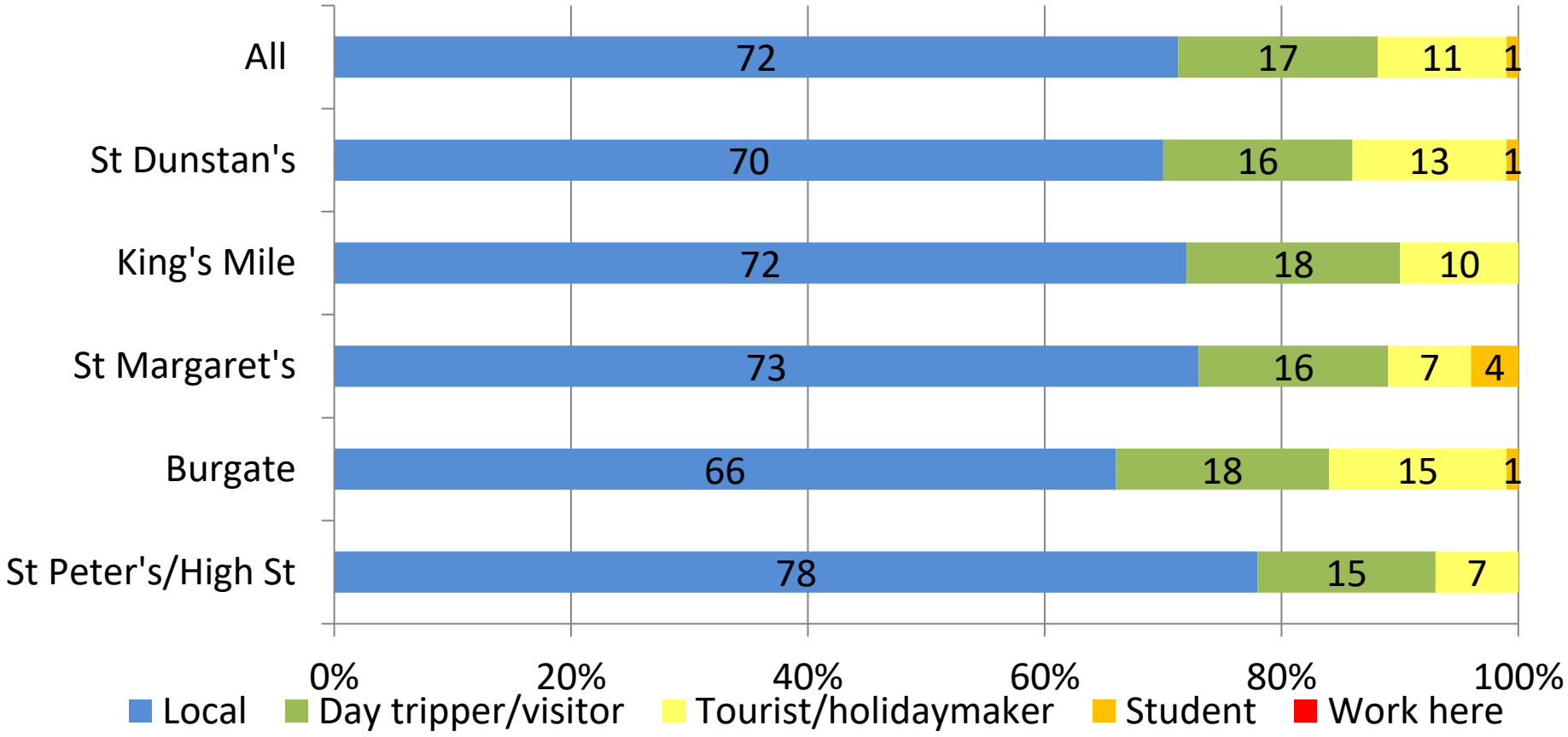
Respondent Description (Spring 21)

Which of these best describes you?

(n = all respondents)



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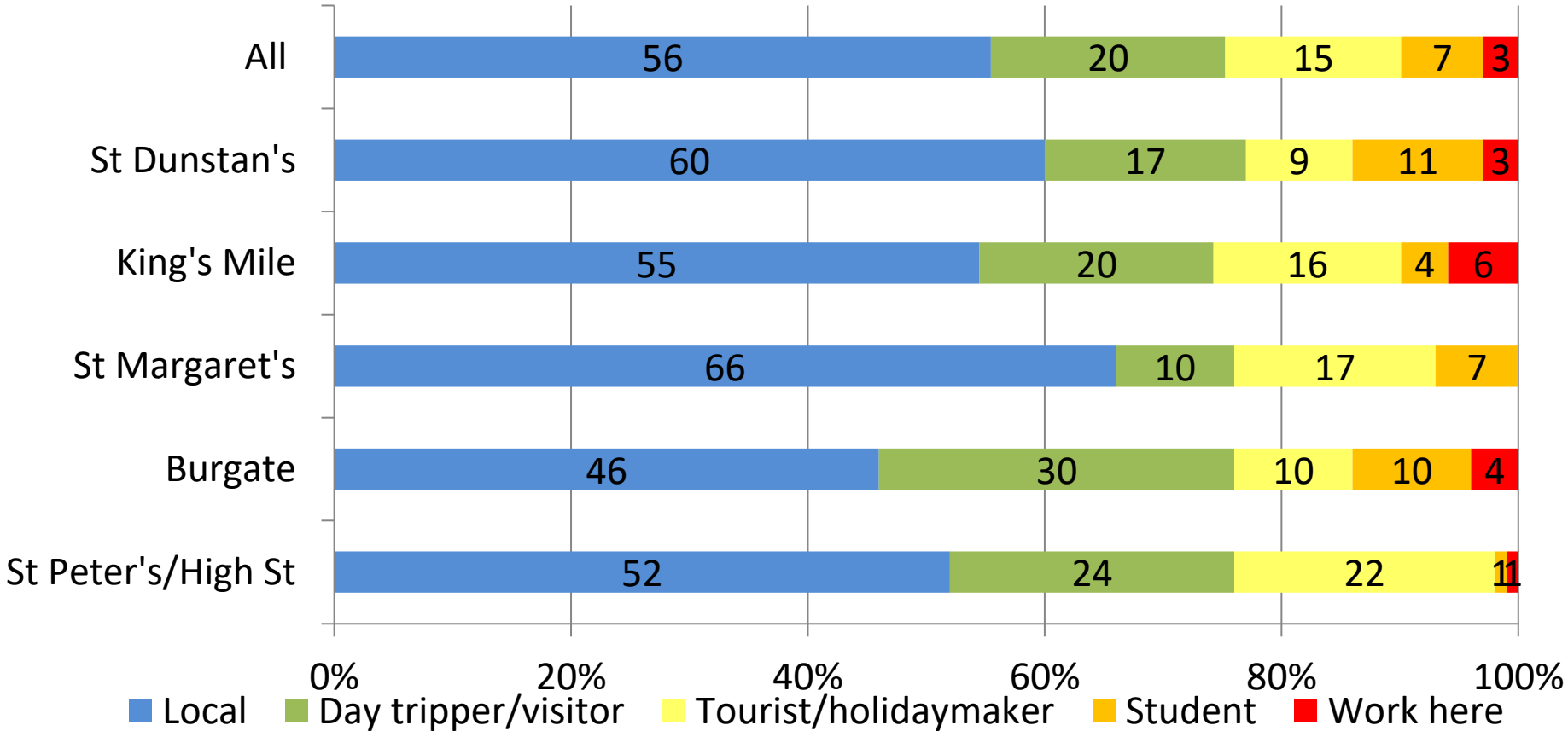
Respondent Description (Spring 19)

Which of these best describes you?

(n = all respondents)



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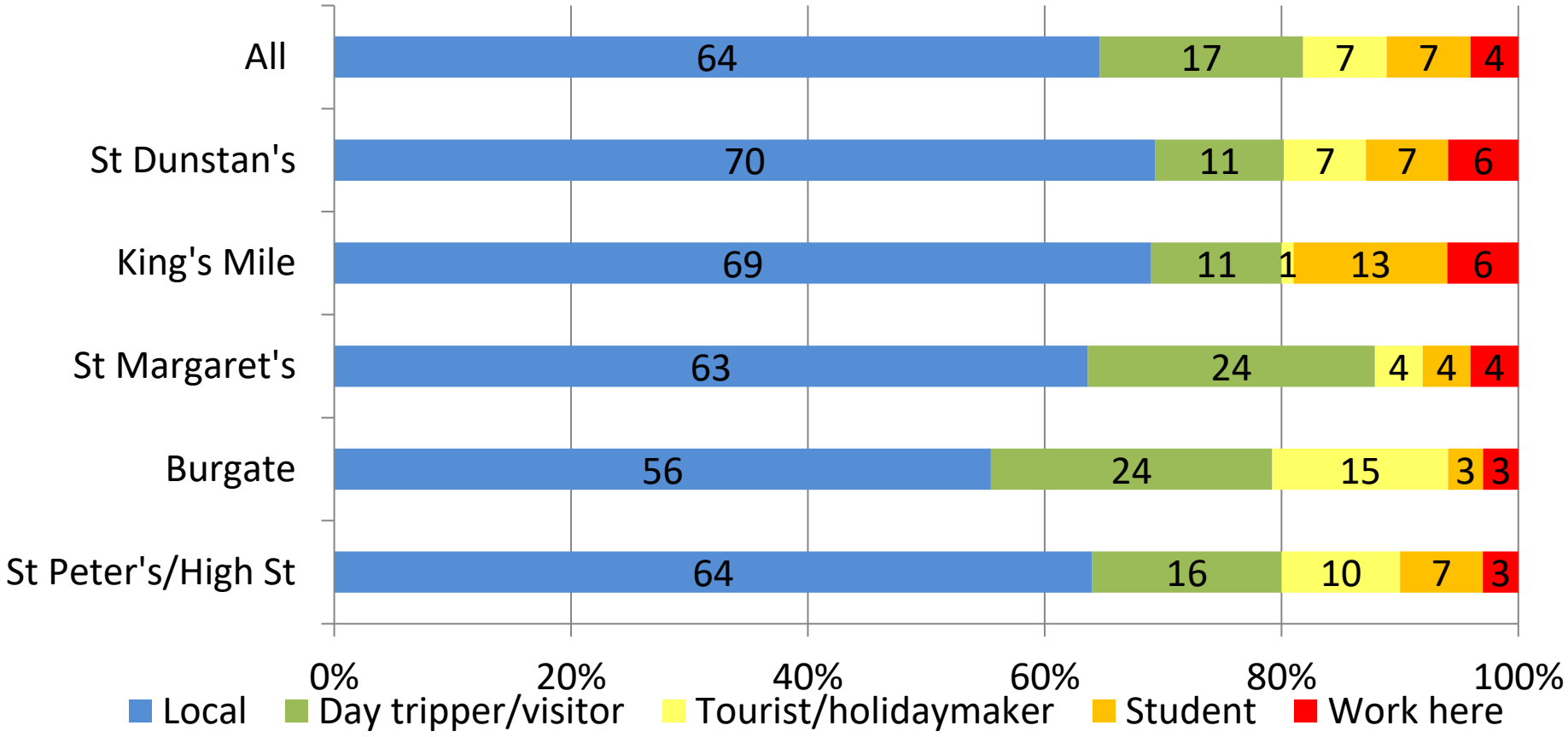
Respondent Description (Spring 17)

Which of these best describes you?

(n = all respondents)



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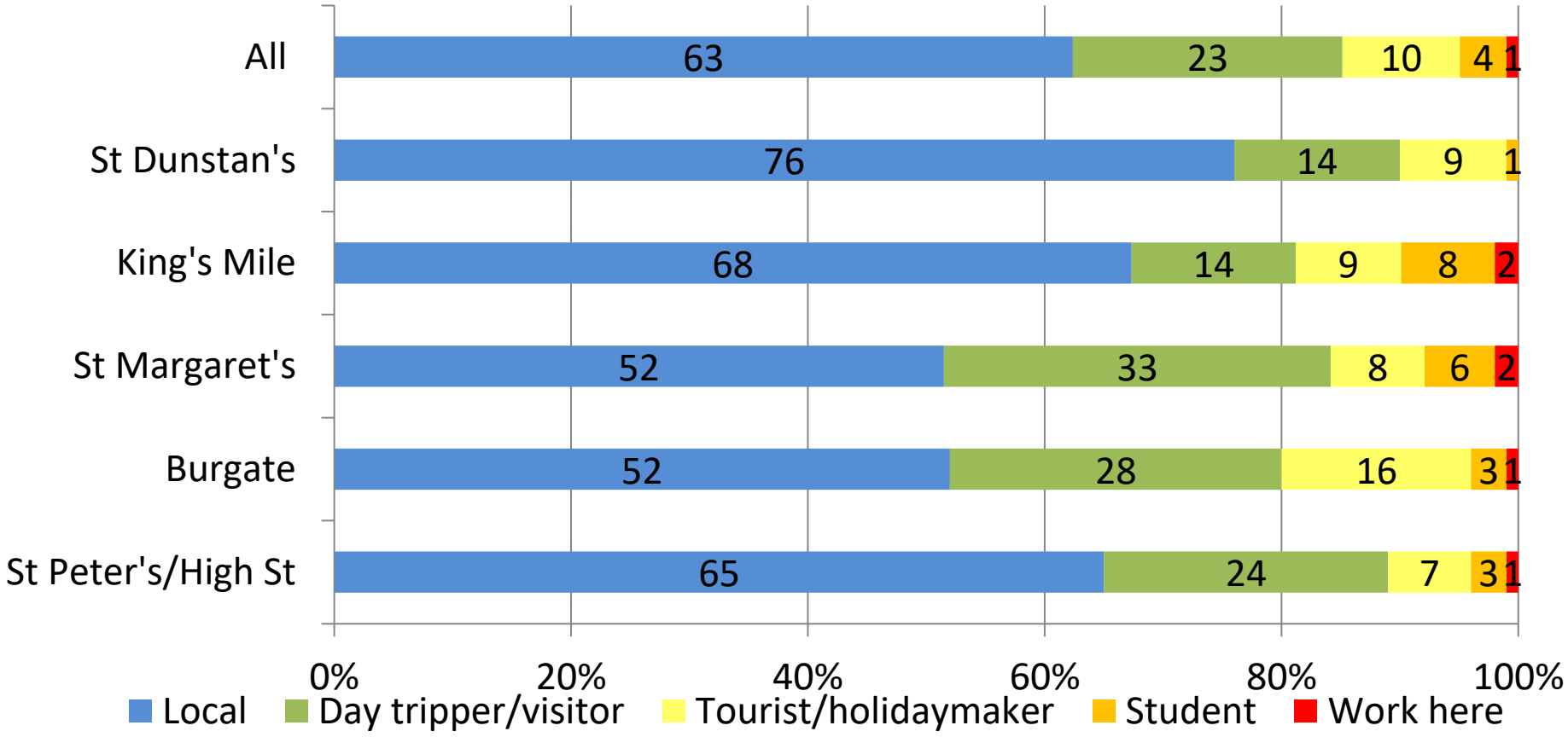
Respondent Description (Spring 15)

Which of these best describes you?

(n = all respondents)



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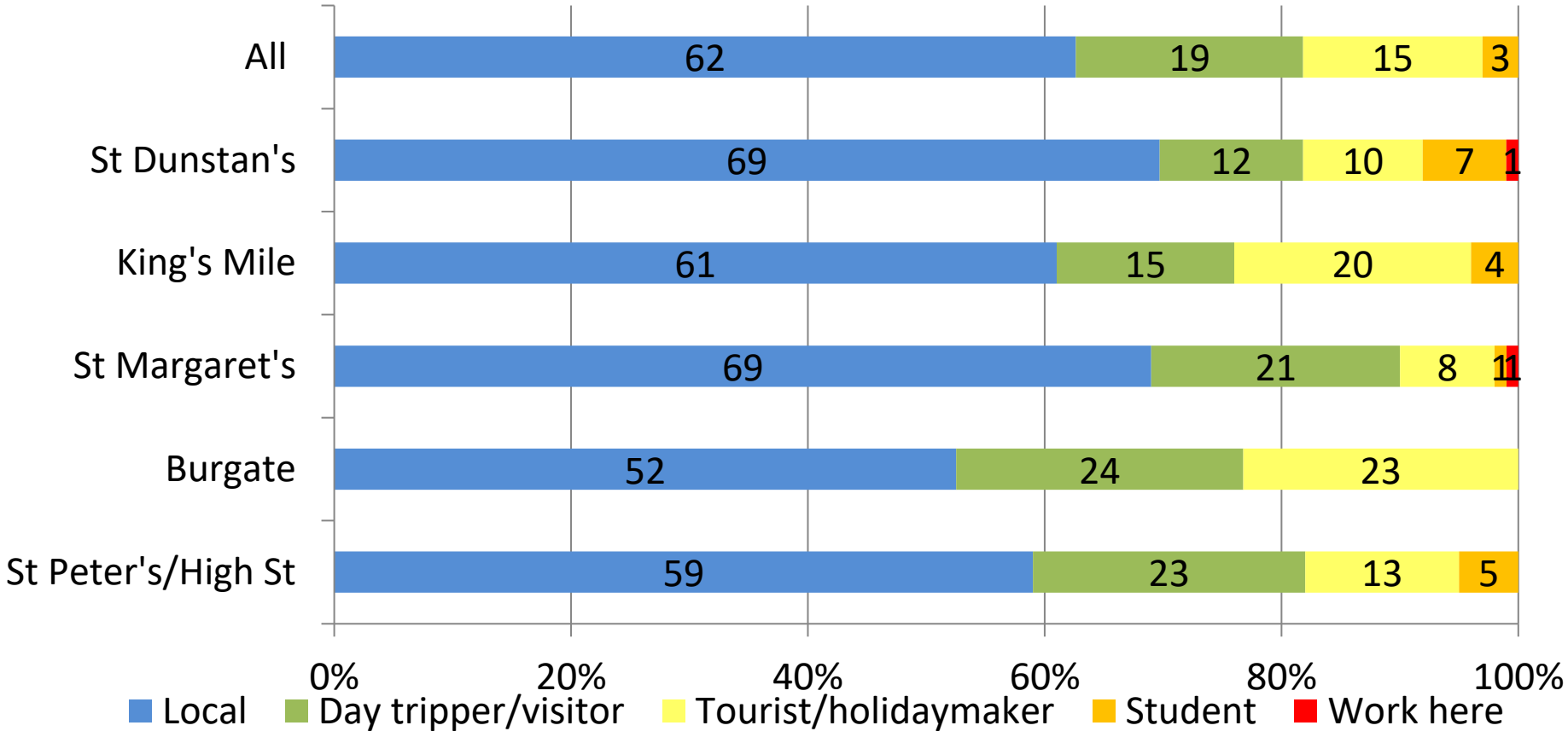
Respondent Description (Spring 13)

Which of these best describes you?

(n = all respondents)



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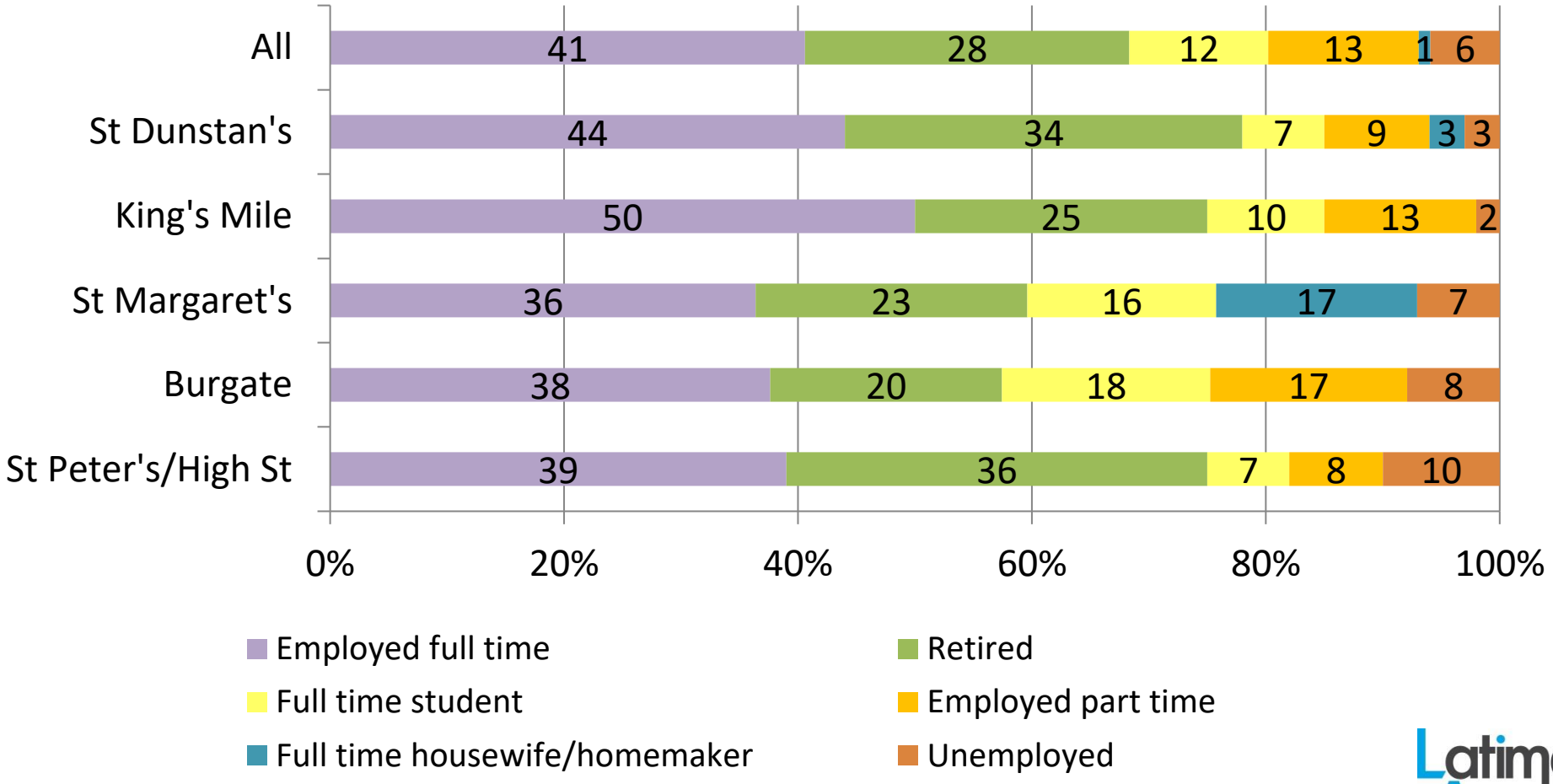
Personal Description (Spring 21)

Which of these best describes you?

(n = all respondents)



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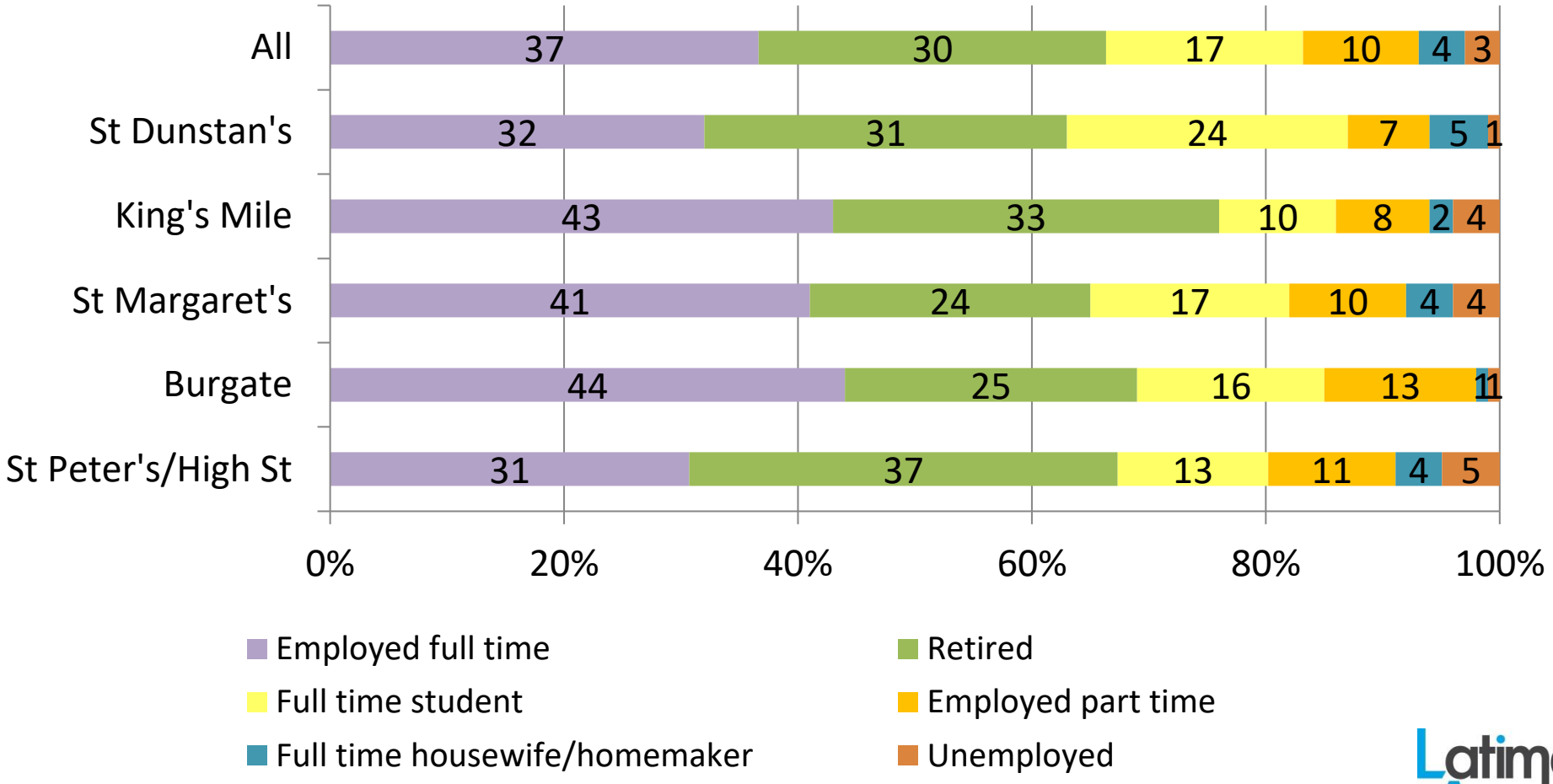
Personal Description (Spring 19)

Which of these best describes you?

(n = all respondents)



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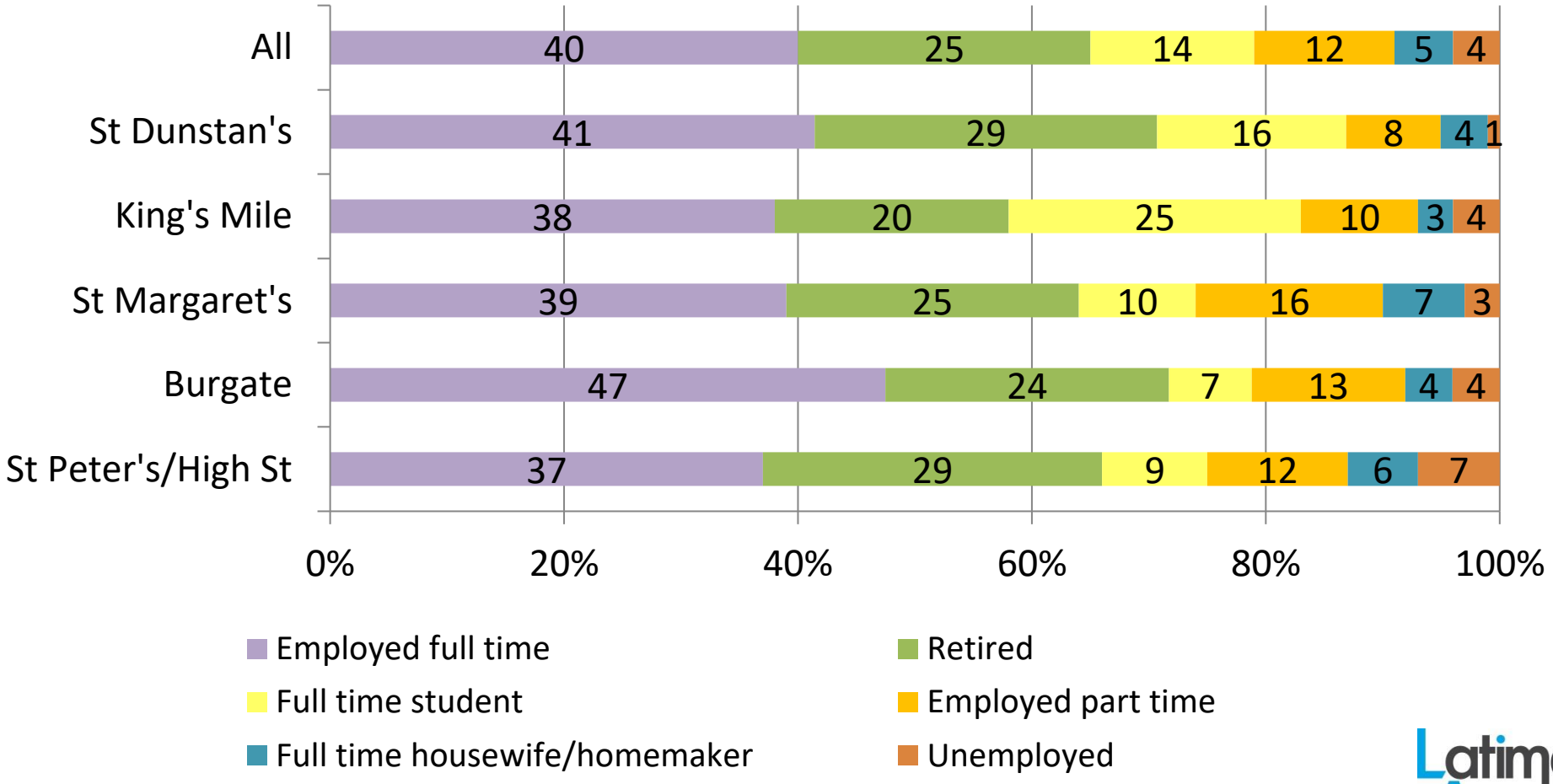
Personal Description (Spring 17)

Which of these best describes you?

(n = all respondents)



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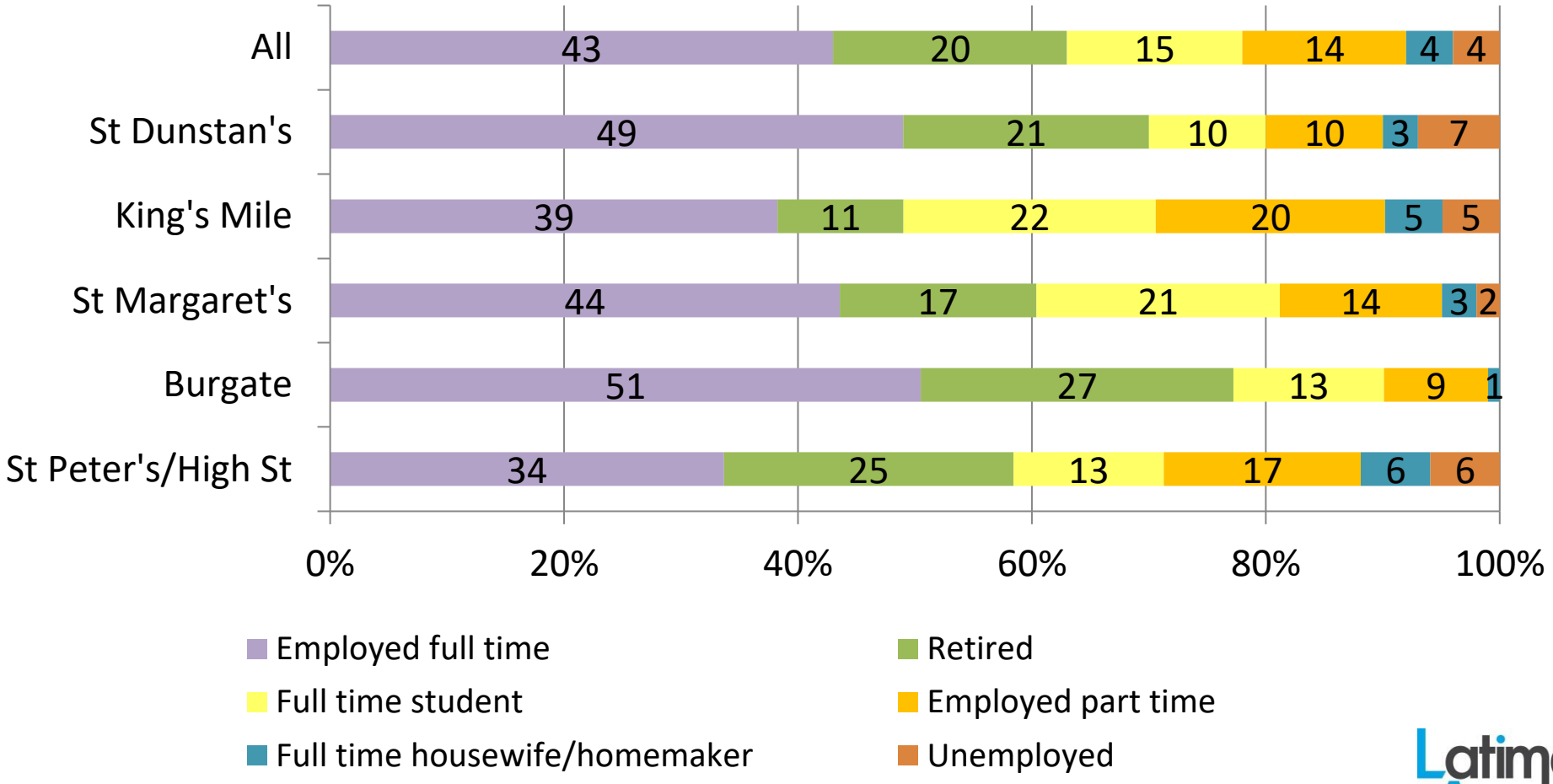
Personal Description (Spring 15)

Which of these best describes you?

(n = all respondents)



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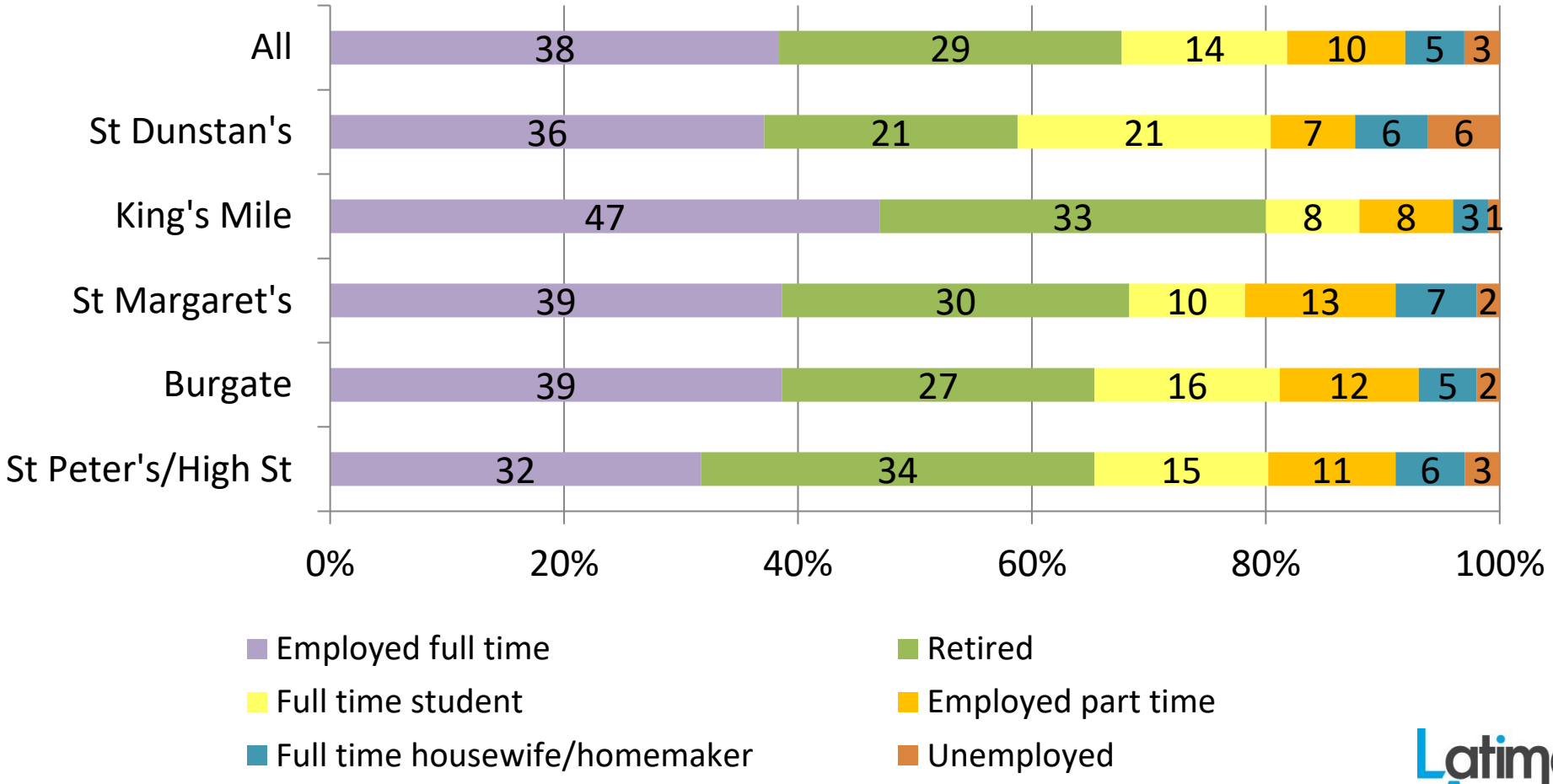
Personal Description (Spring 13)

Which of these best describes you?

(n = all respondents)



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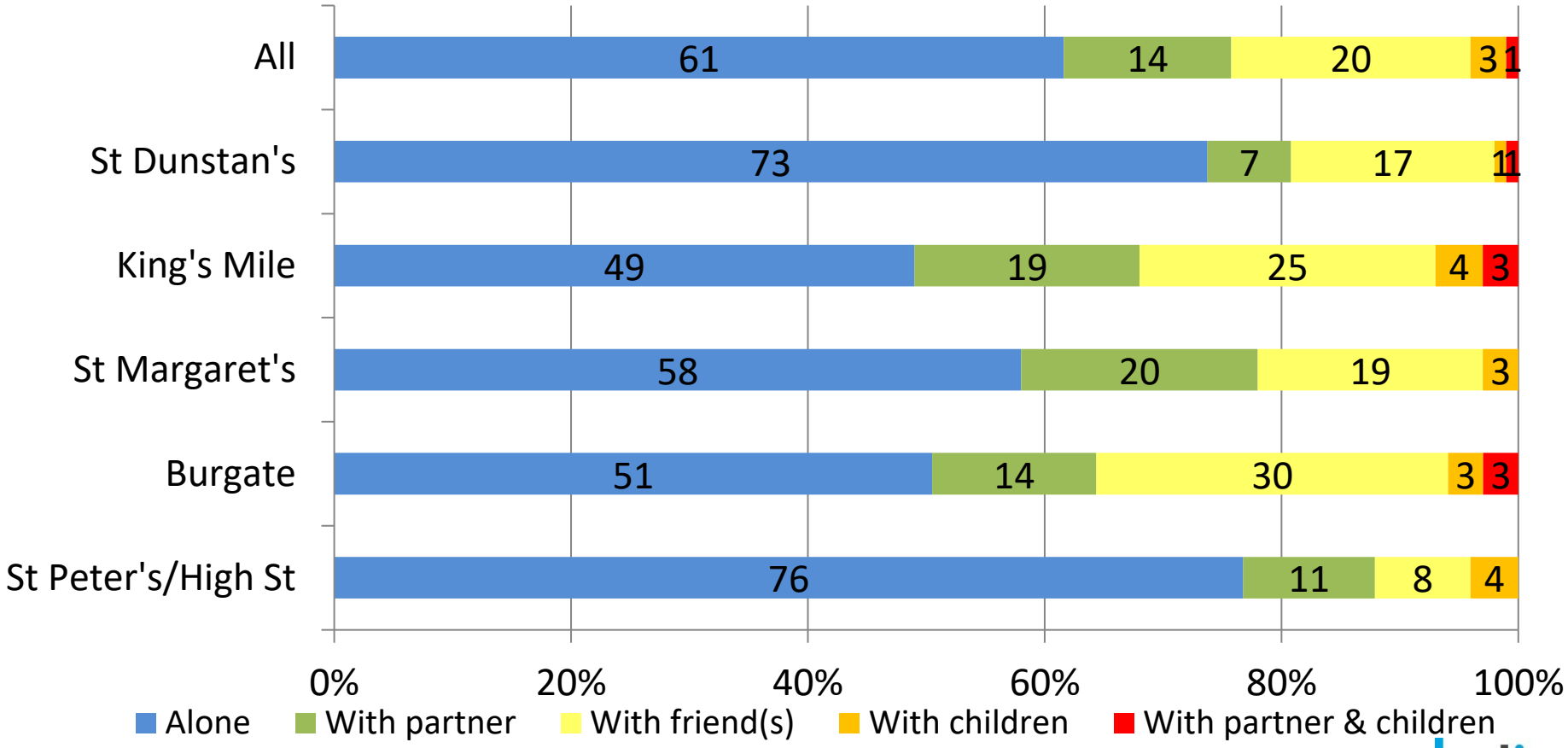
Party Description (Spring 21)

Who are you with today?

(n = all respondents)



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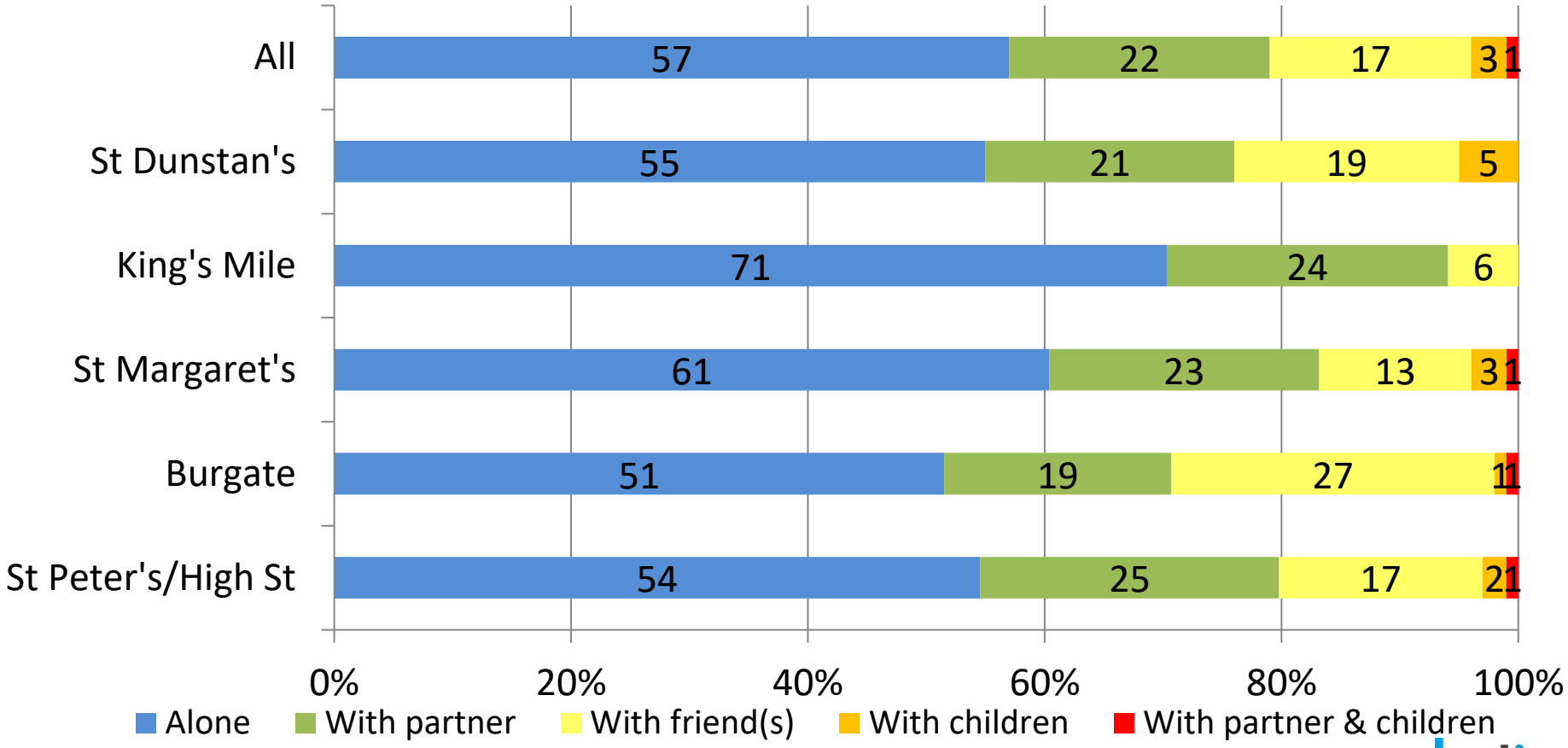
Party Description (Spring 19)

Who are you with today?

(n = all respondents)



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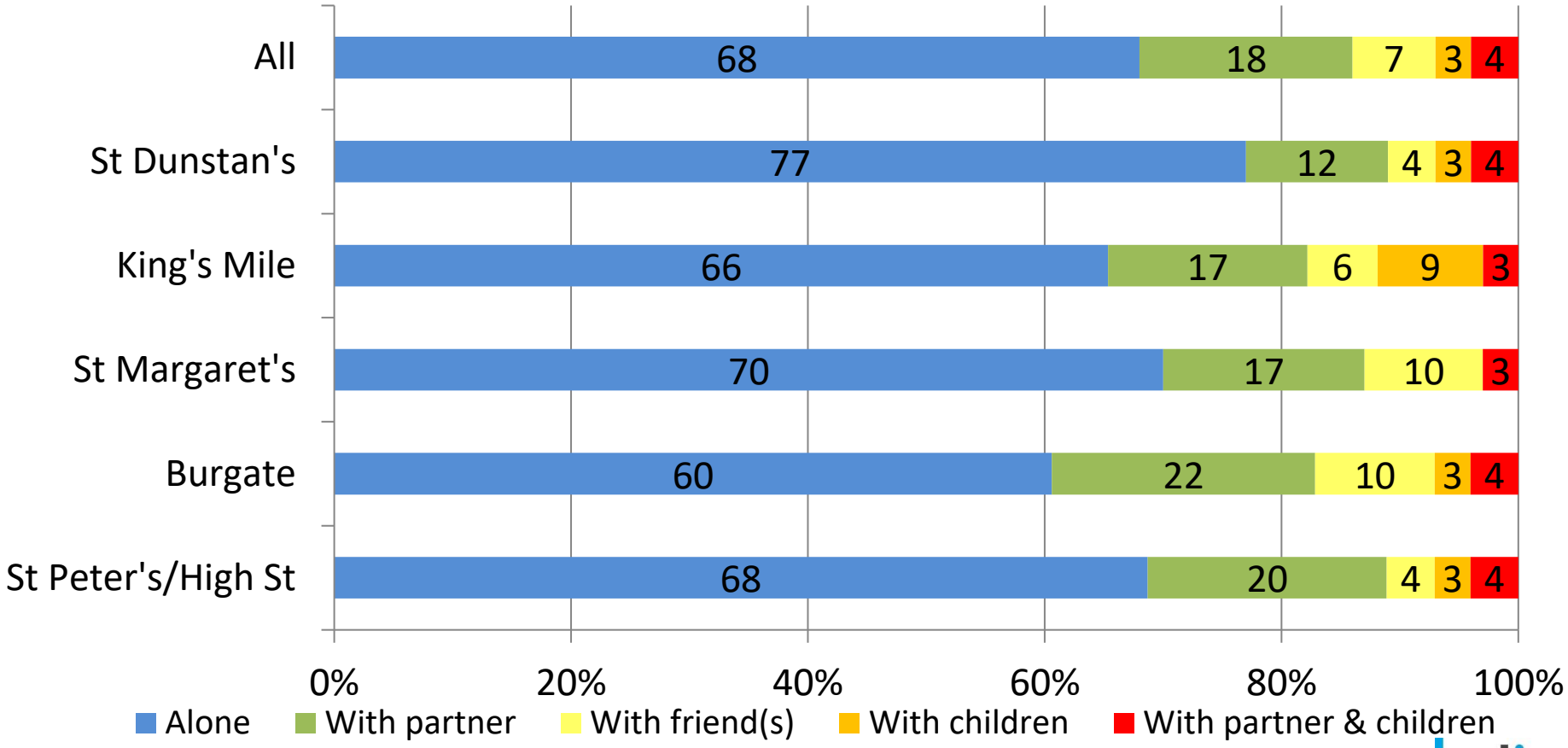
Party Description (Spring 17)

Who are you with today?

(n = all respondents)



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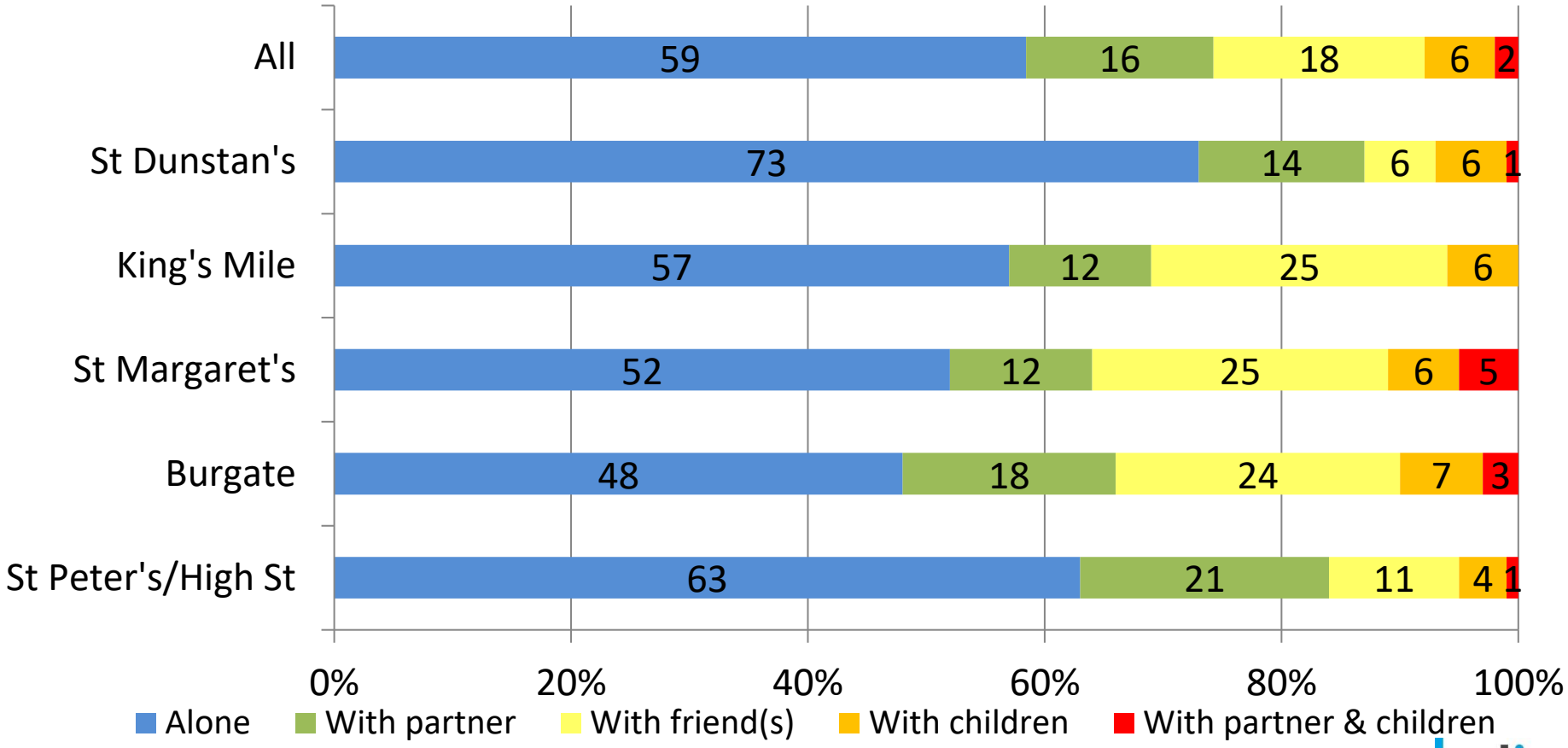
Party Description (Spring 15)

Who are you with today?

(n = all respondents)



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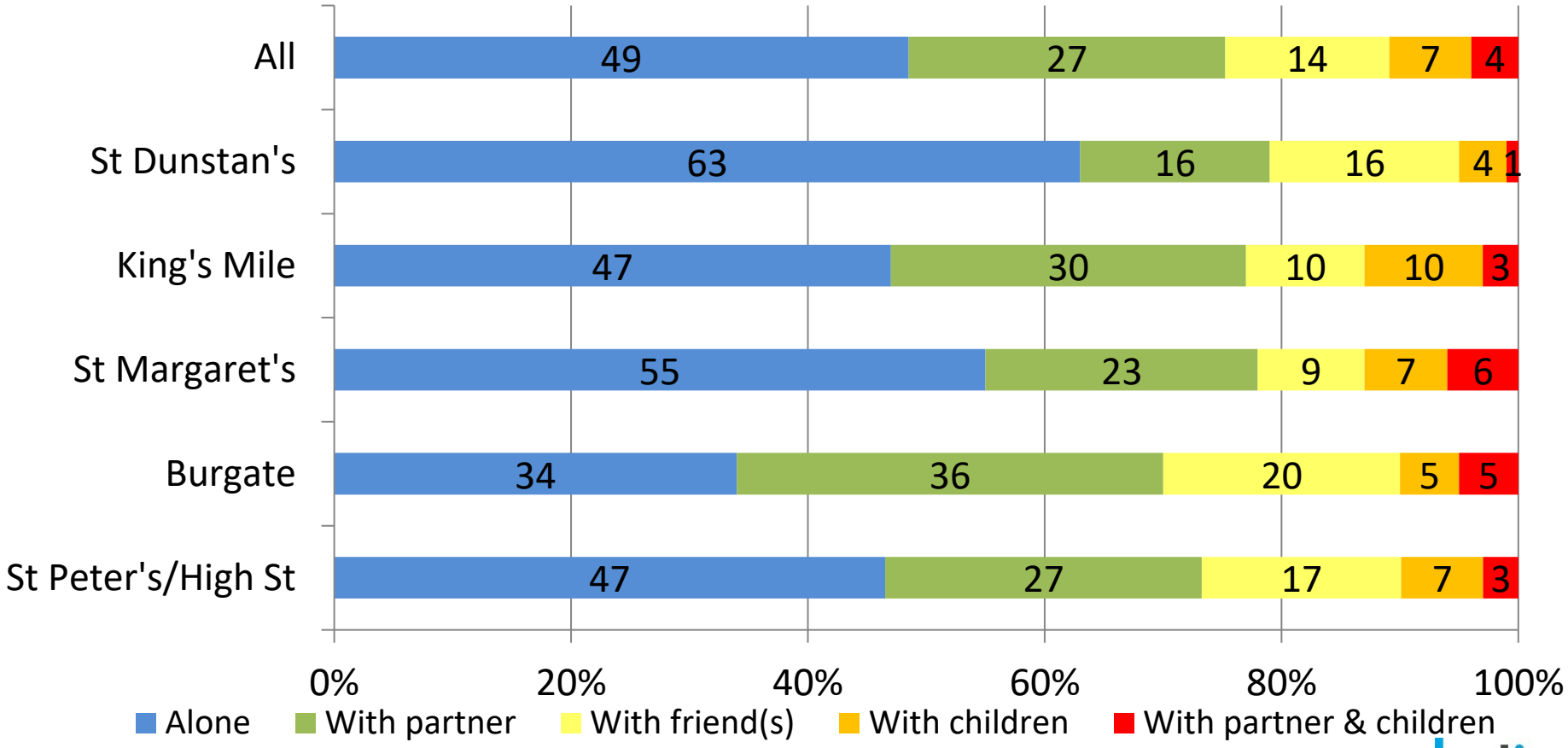
Party Description (Spring 13)

Who are you with today?

(n = all respondents)



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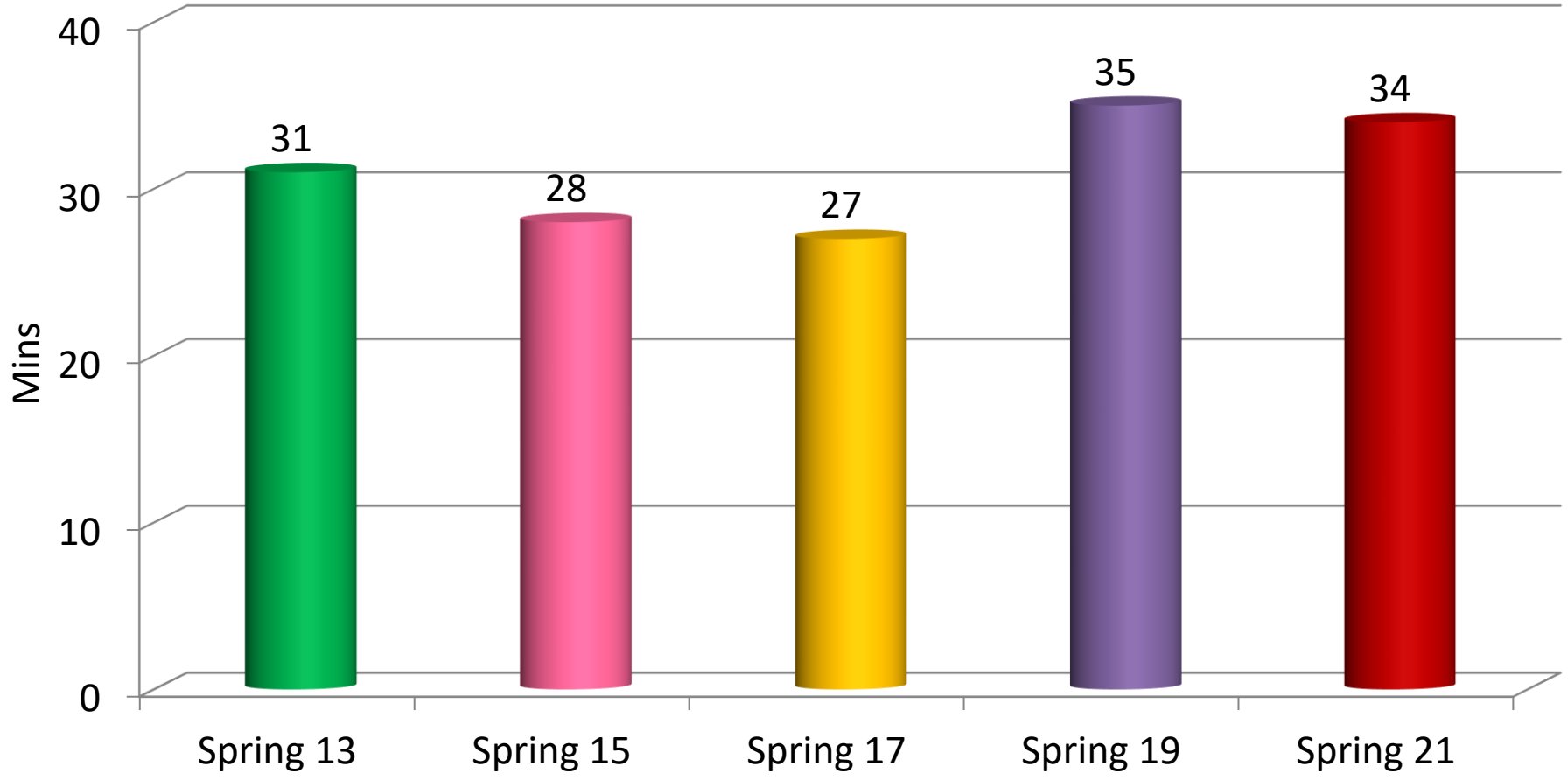
Travel Time

How long did it take you to travel here today?

(n = all respondents)



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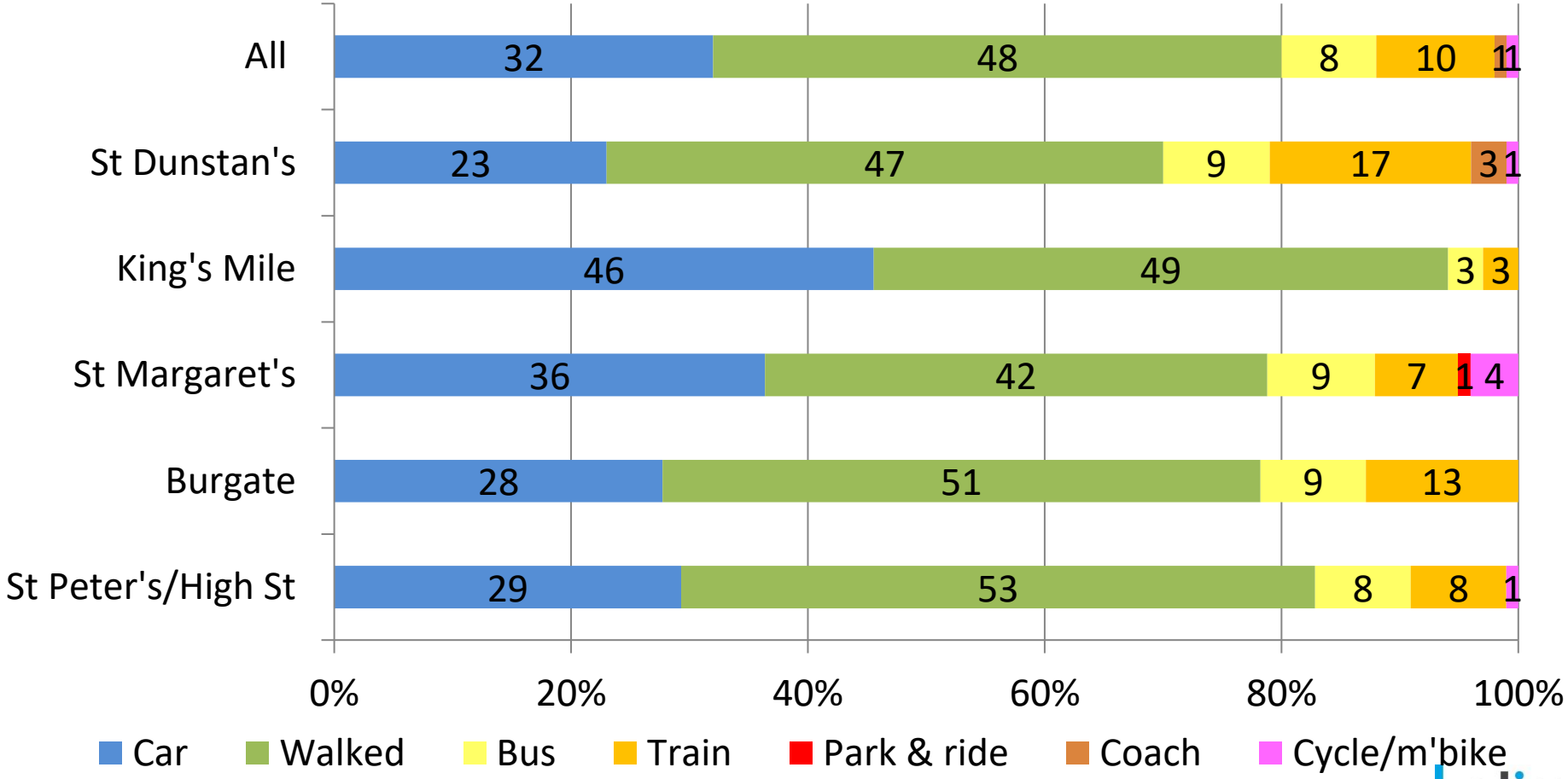
Travel Mode (Spring 21)

How did you travel here today?

(n = all respondents)



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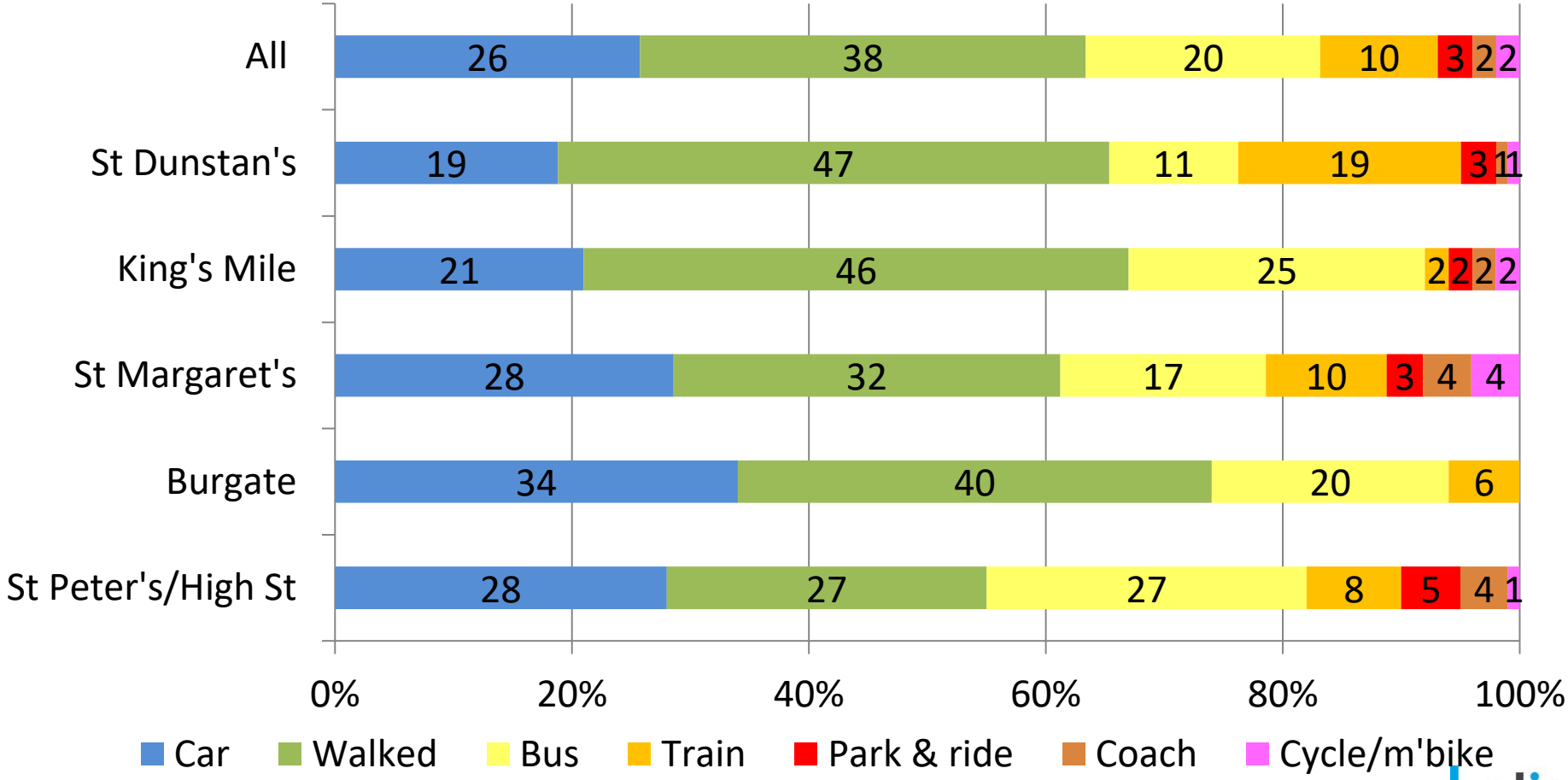
Travel Mode (Spring 19)

How did you travel here today?

(n = all respondents)



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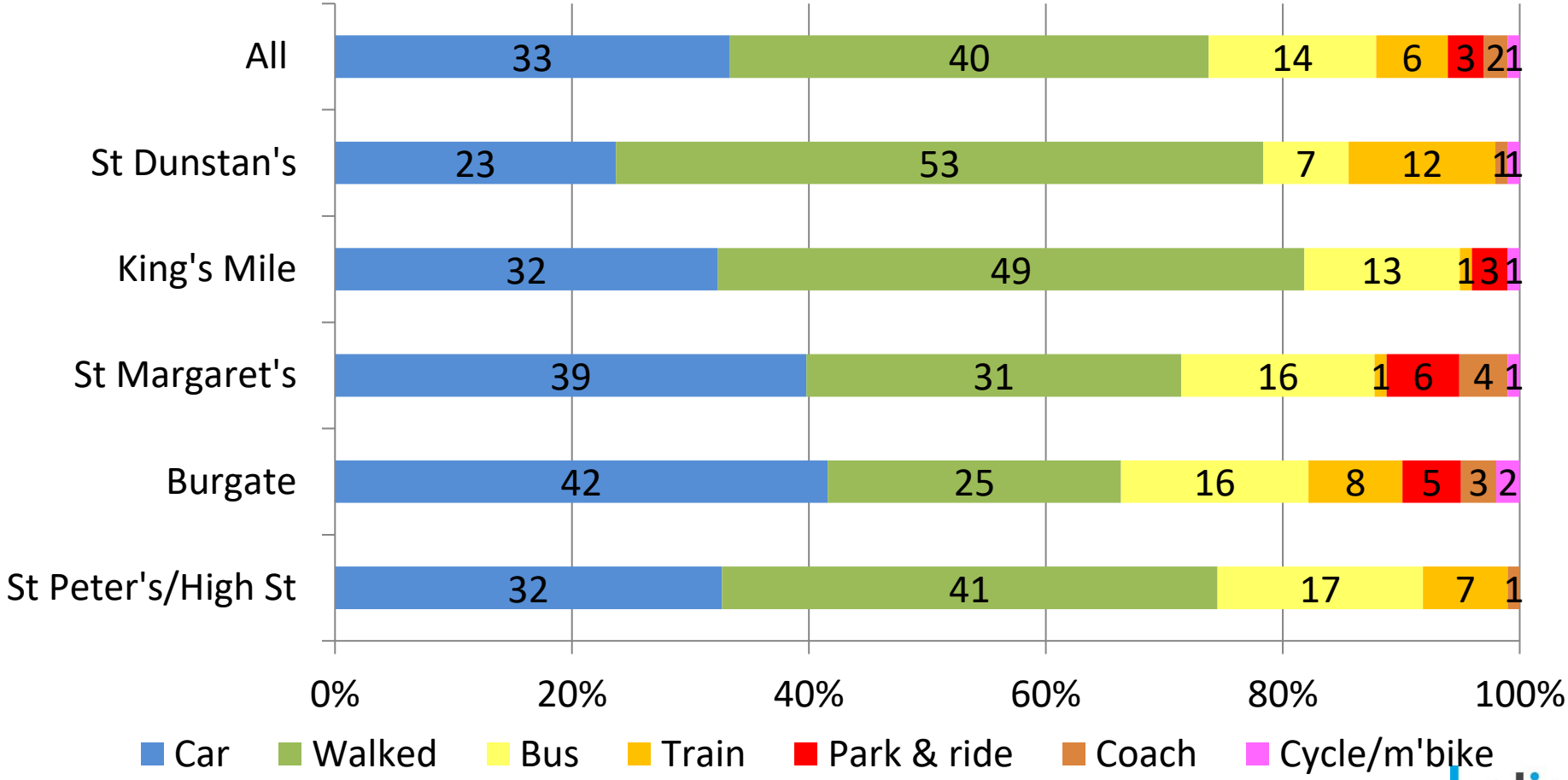
Travel Mode (Spring 17)

How did you travel here today?

(n = all respondents)



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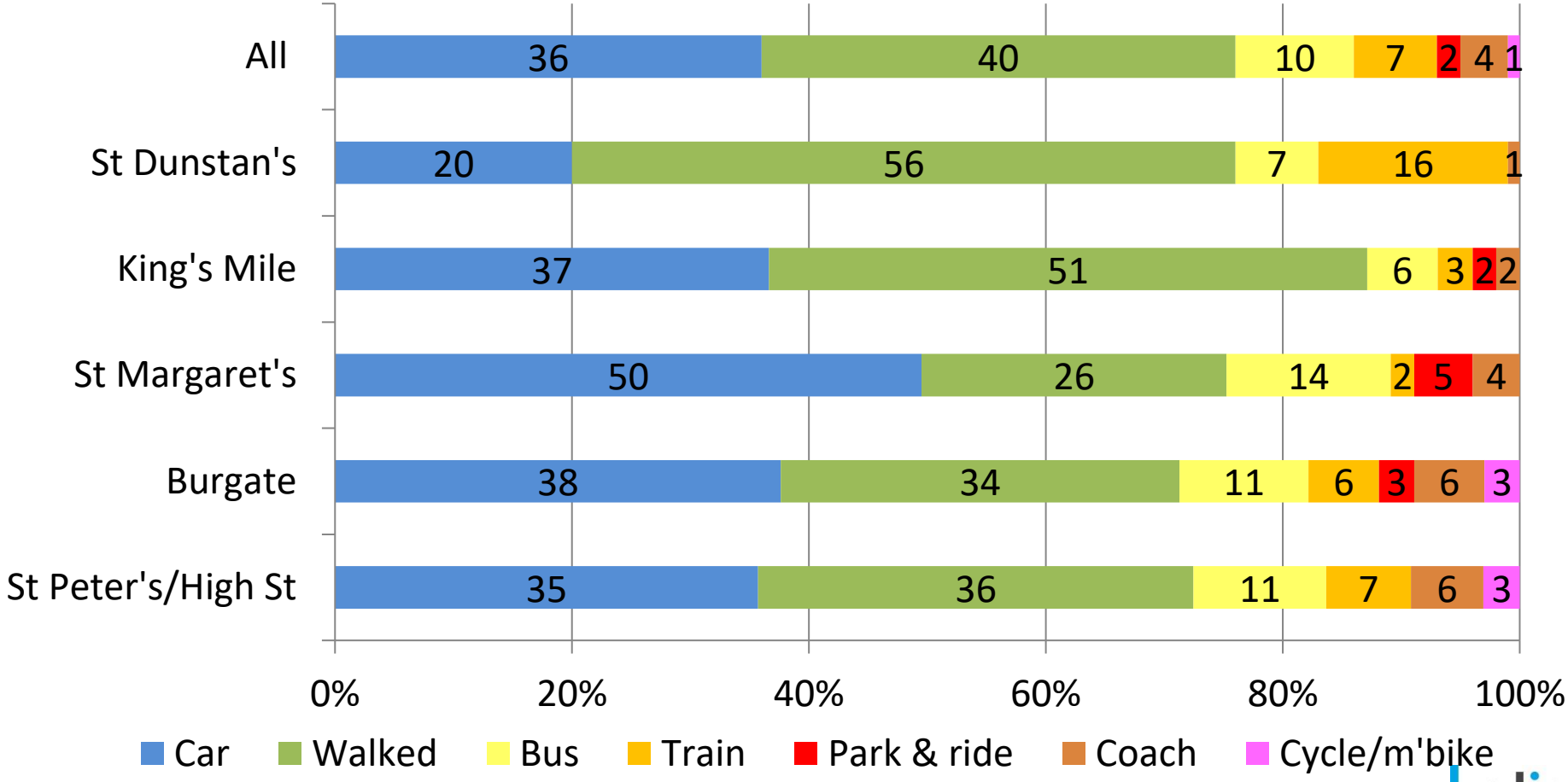
Travel Mode (Spring 15)

How did you travel here today?

(n = all respondents)



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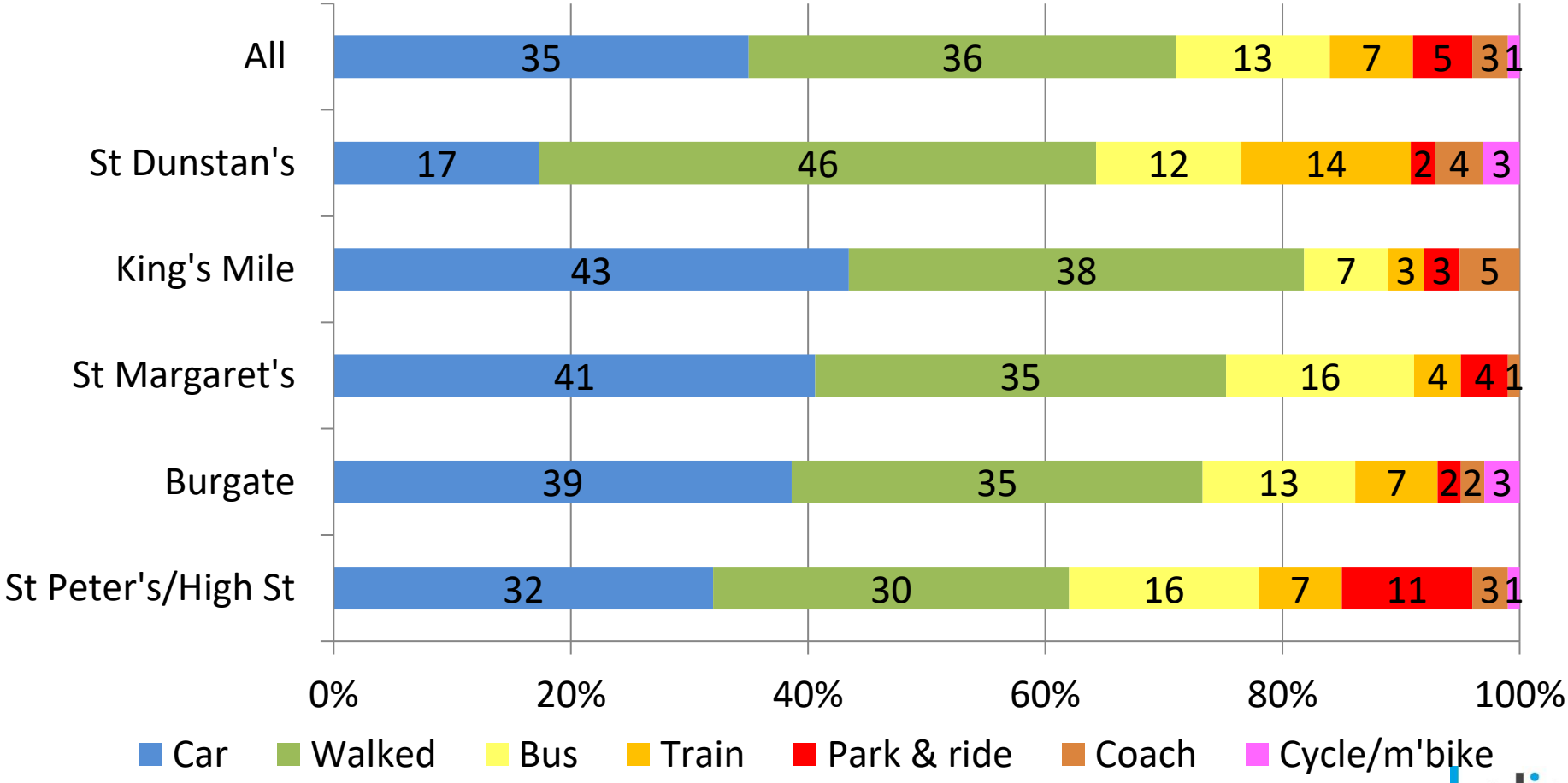
Travel Mode (Spring 13)

How did you travel here today?

(n = all respondents)



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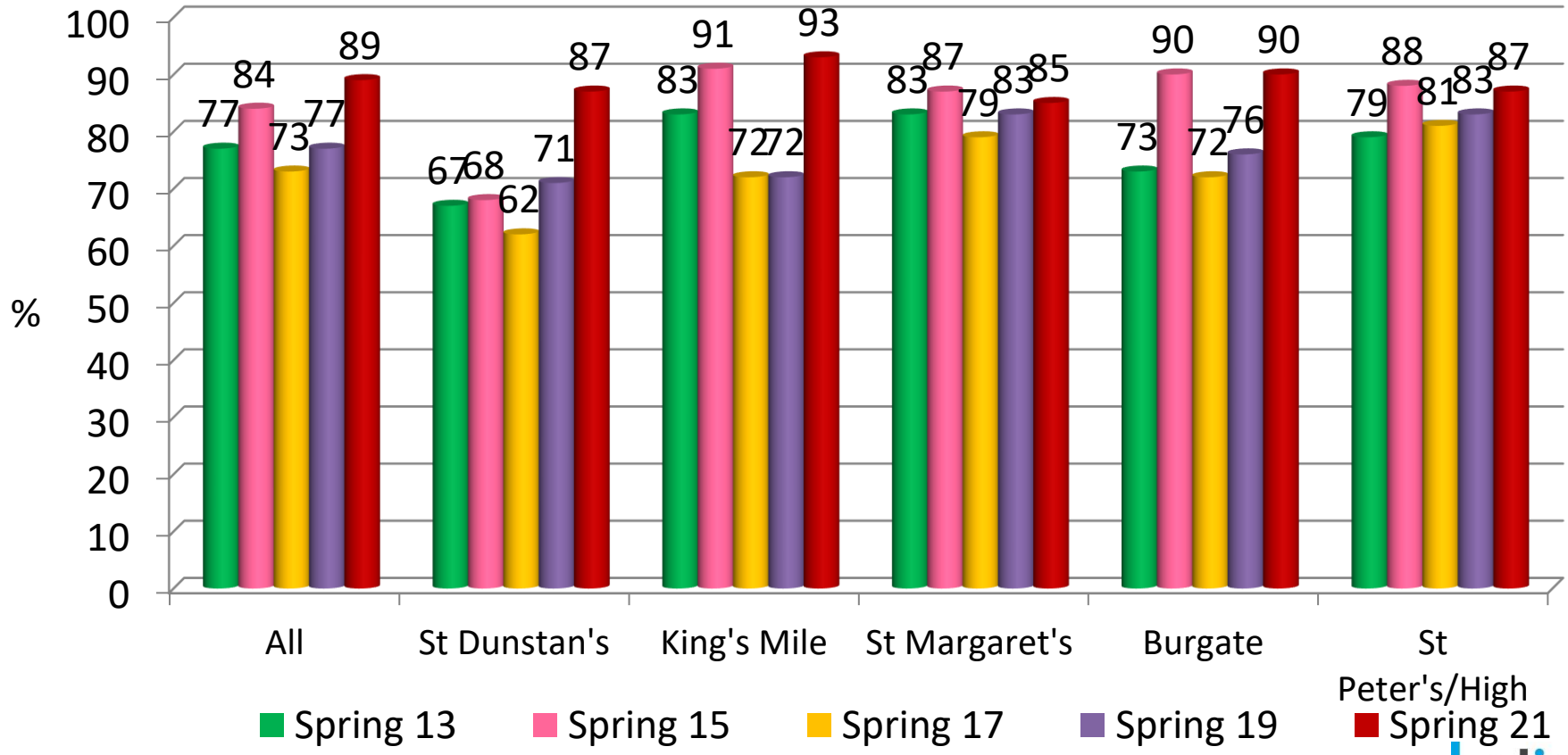
Shopping Today

Proportion shopping in Canterbury city centre today

(n = all respondents)



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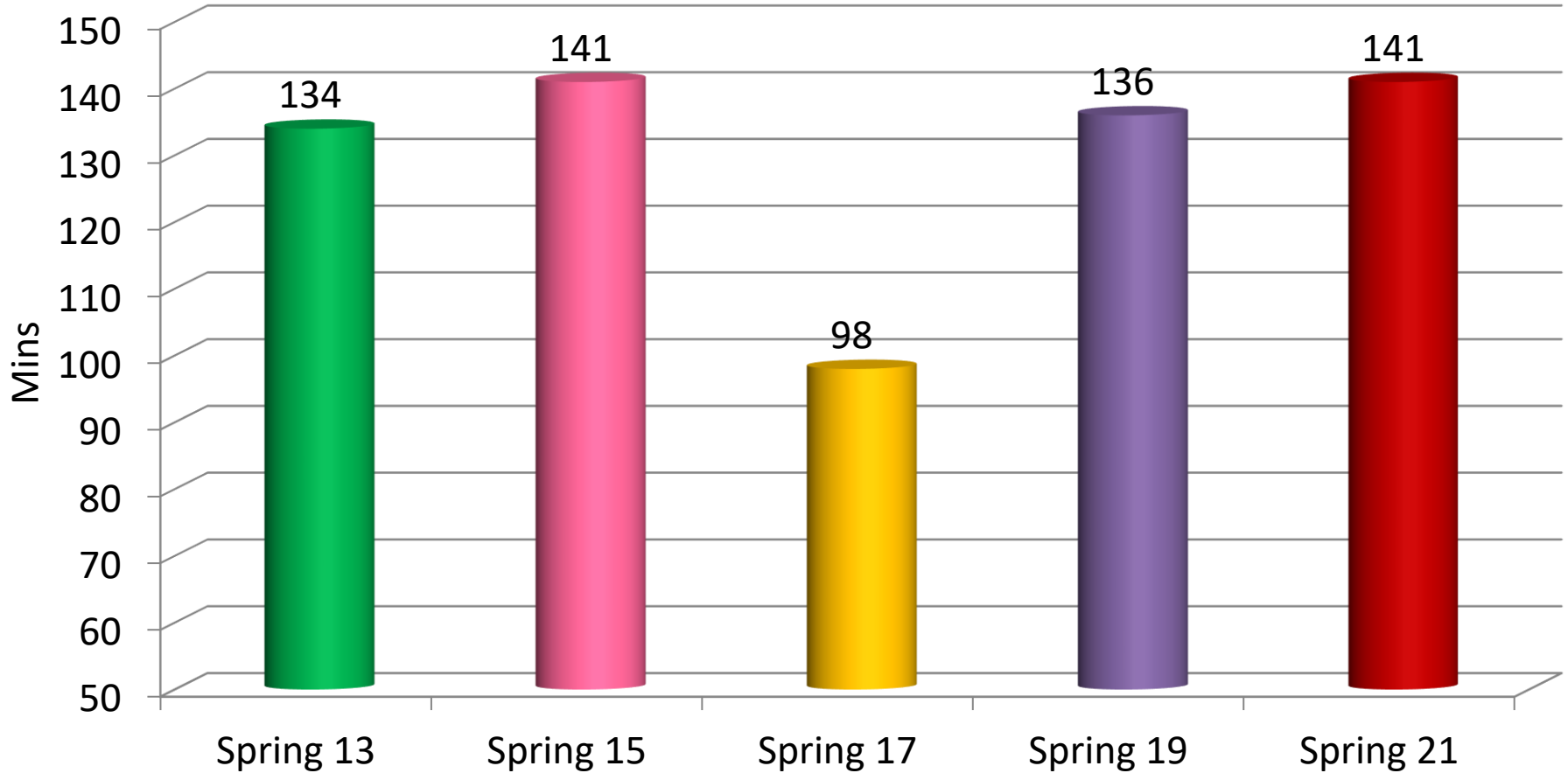
Dwell Time

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

(n = those shopping in Canterbury today)



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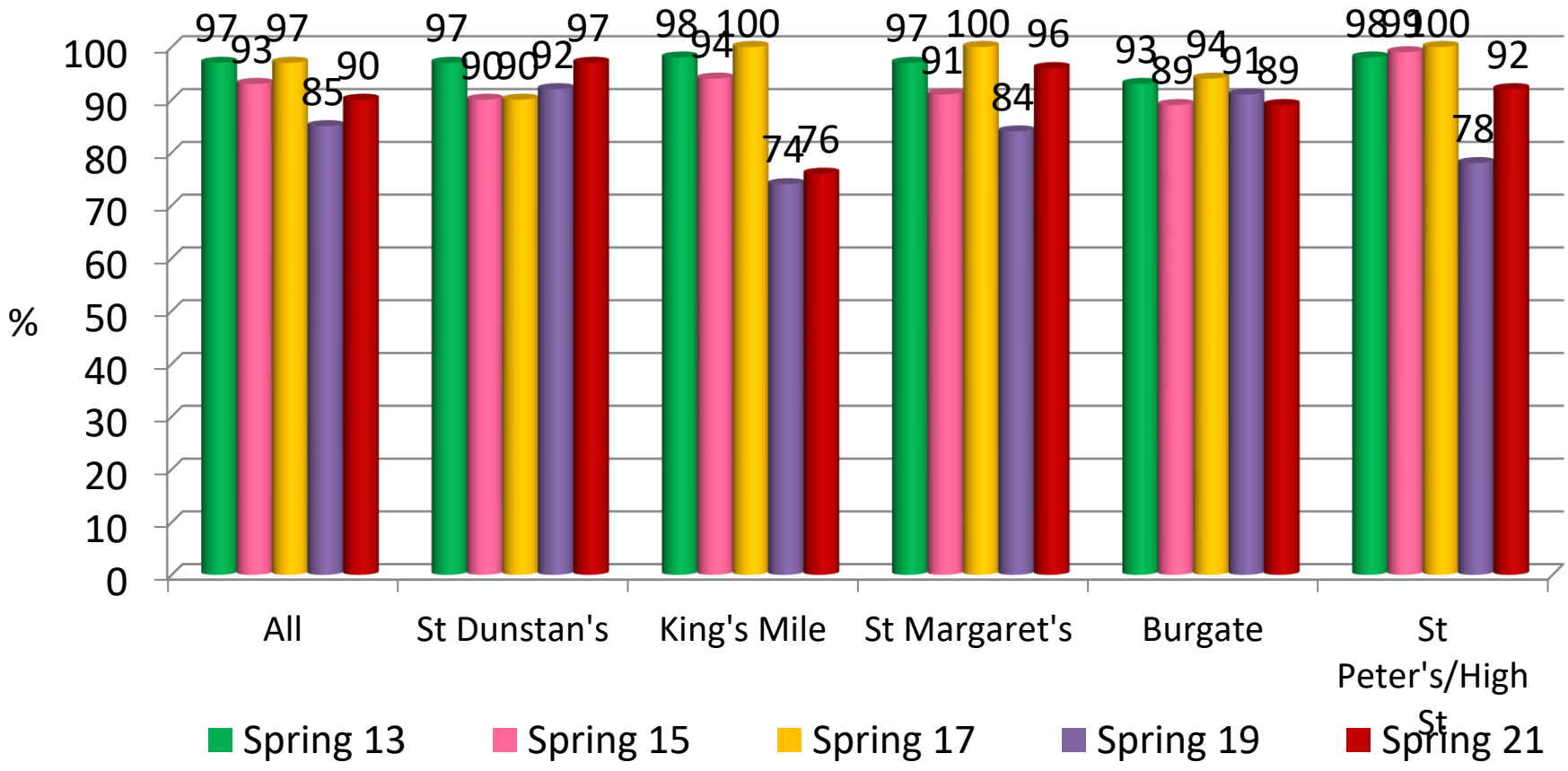
Canterbury Non-food Shoppers

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

(n = all respondents)



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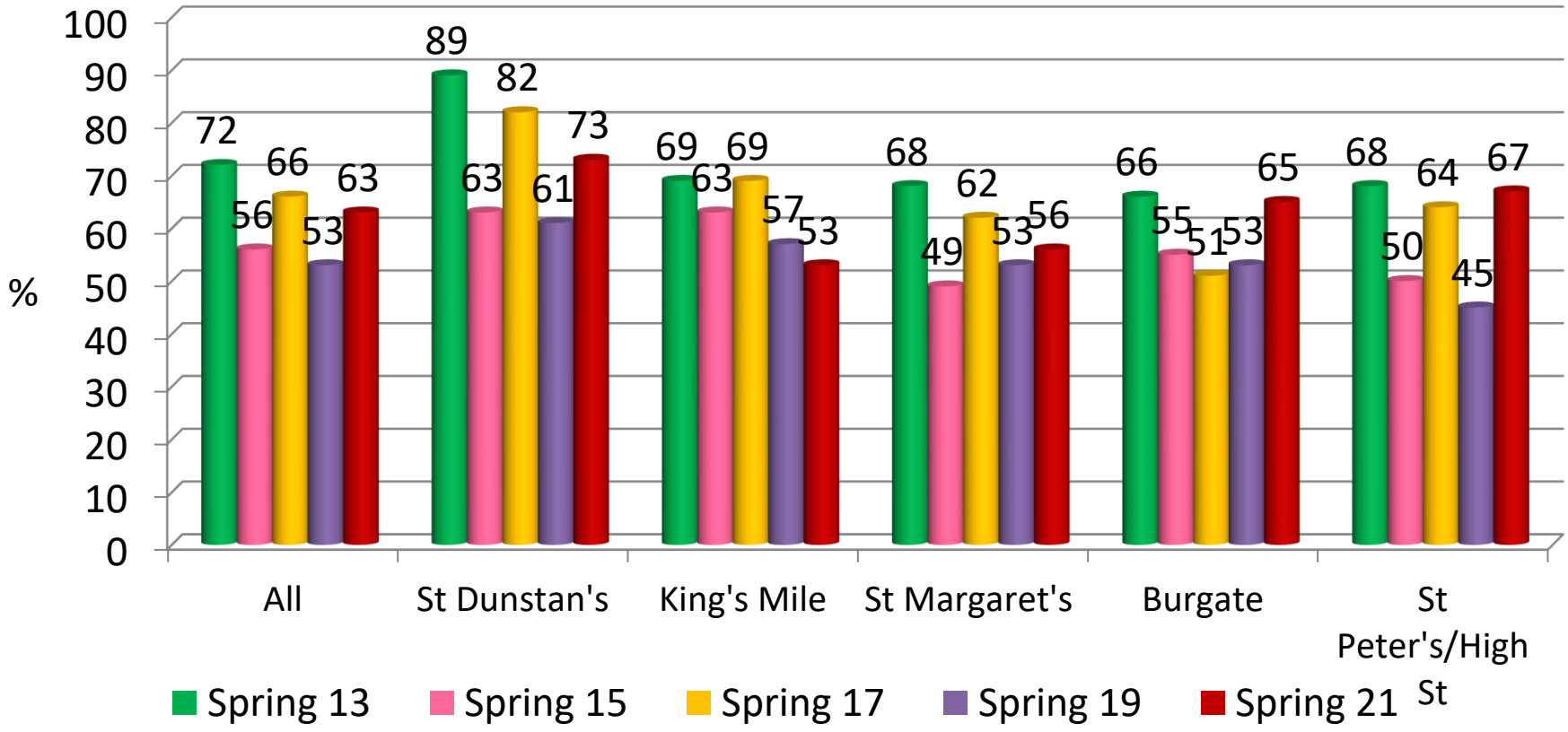
Canterbury Grocery Shoppers

Proportion who ever shop in Canterbury city centre for groceries

(n = all respondents)



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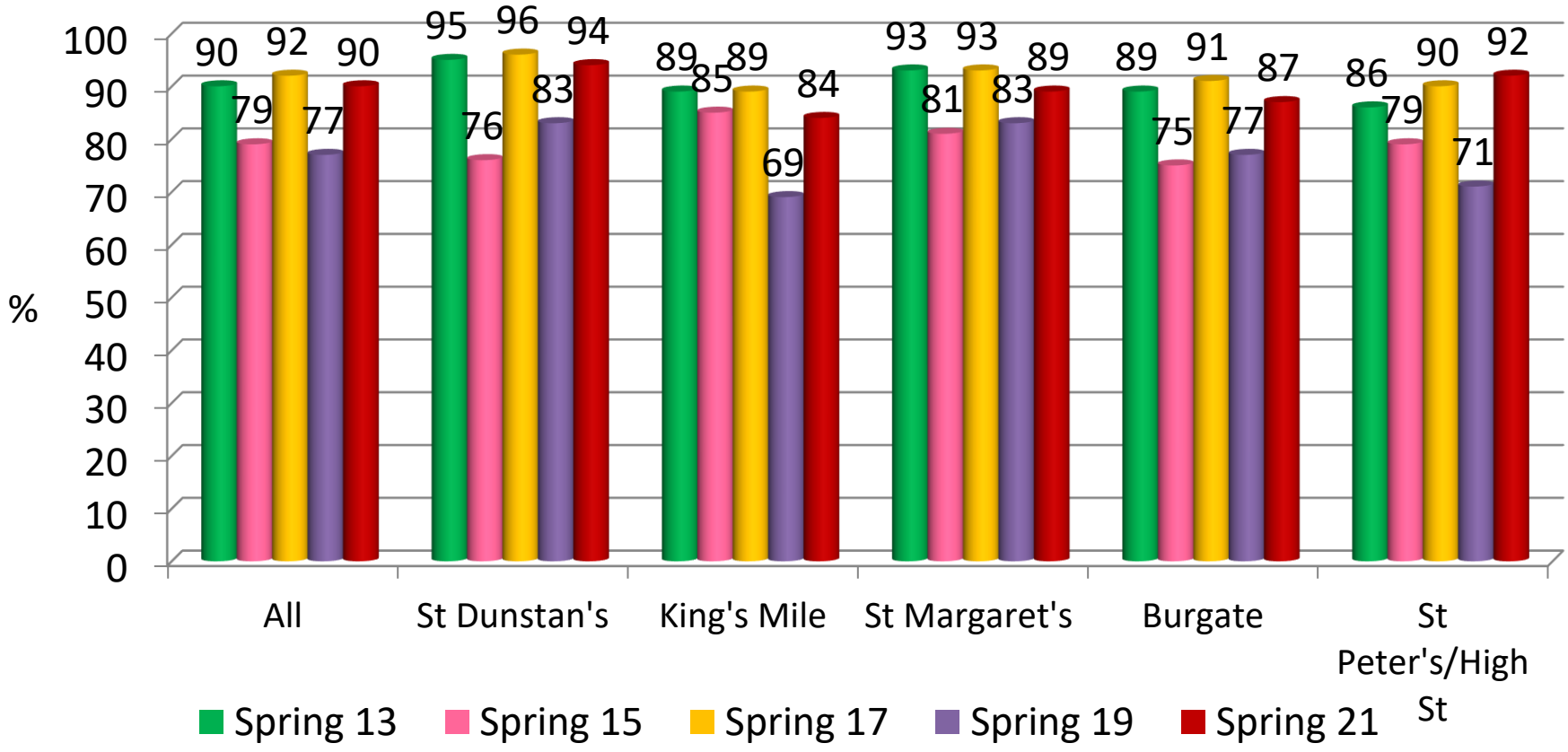
Canterbury Entertainment Visitors

Proportion who ever visit Canterbury city centre for entertainment

(n = all respondents)



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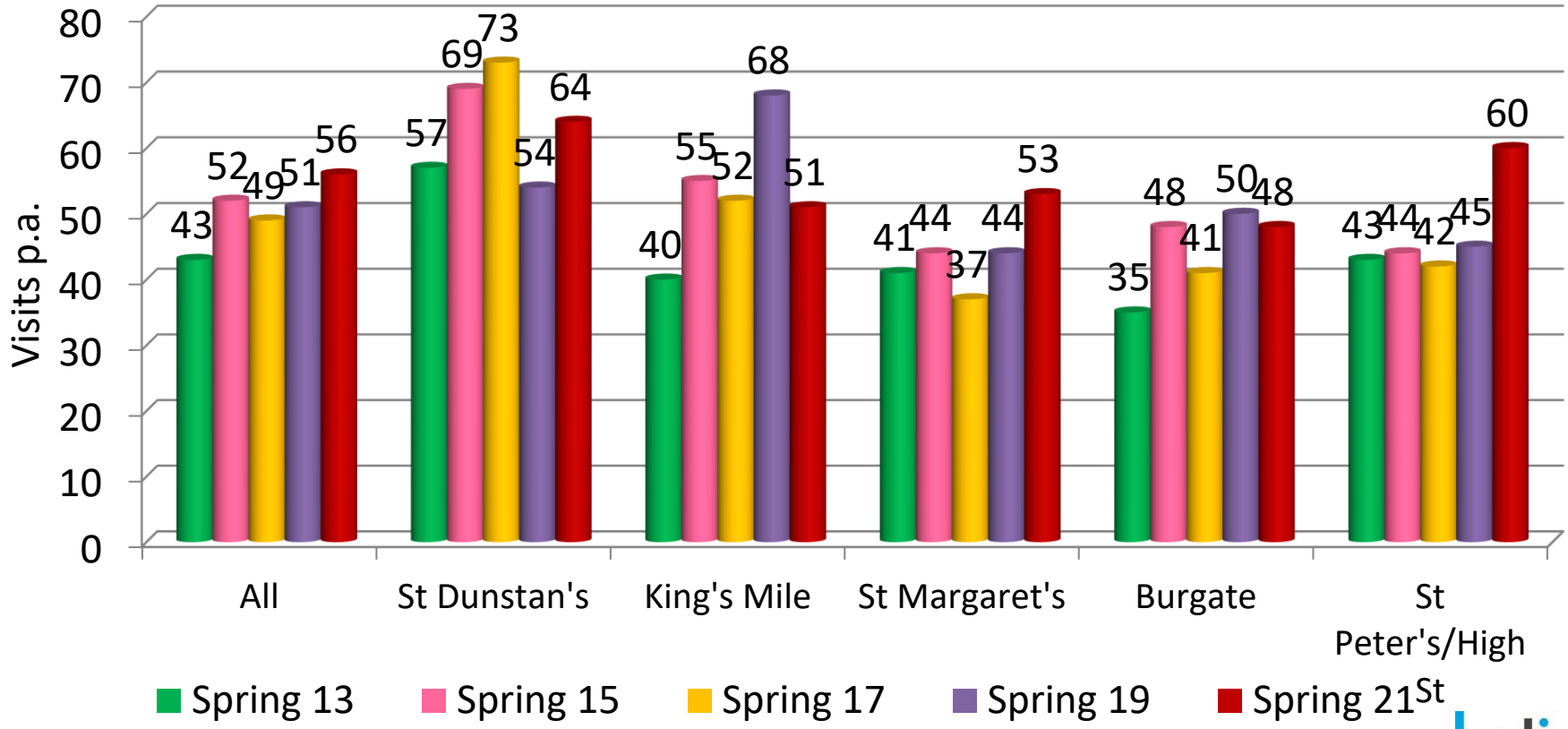
Visit Frequency: Non-foods

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

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



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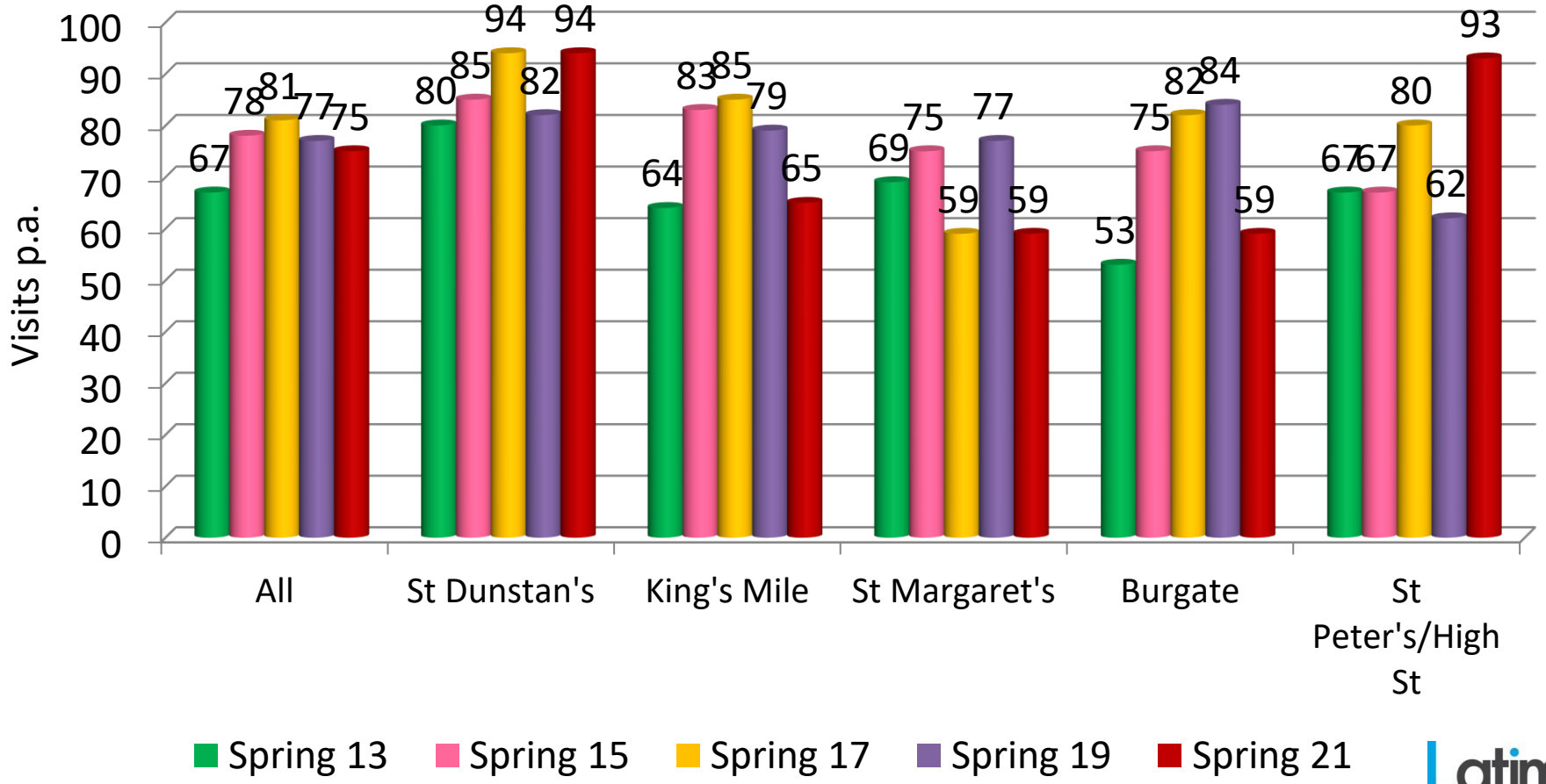
Visit Frequency: Grocery

How often do you visit Canterbury for grocery shopping ?

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



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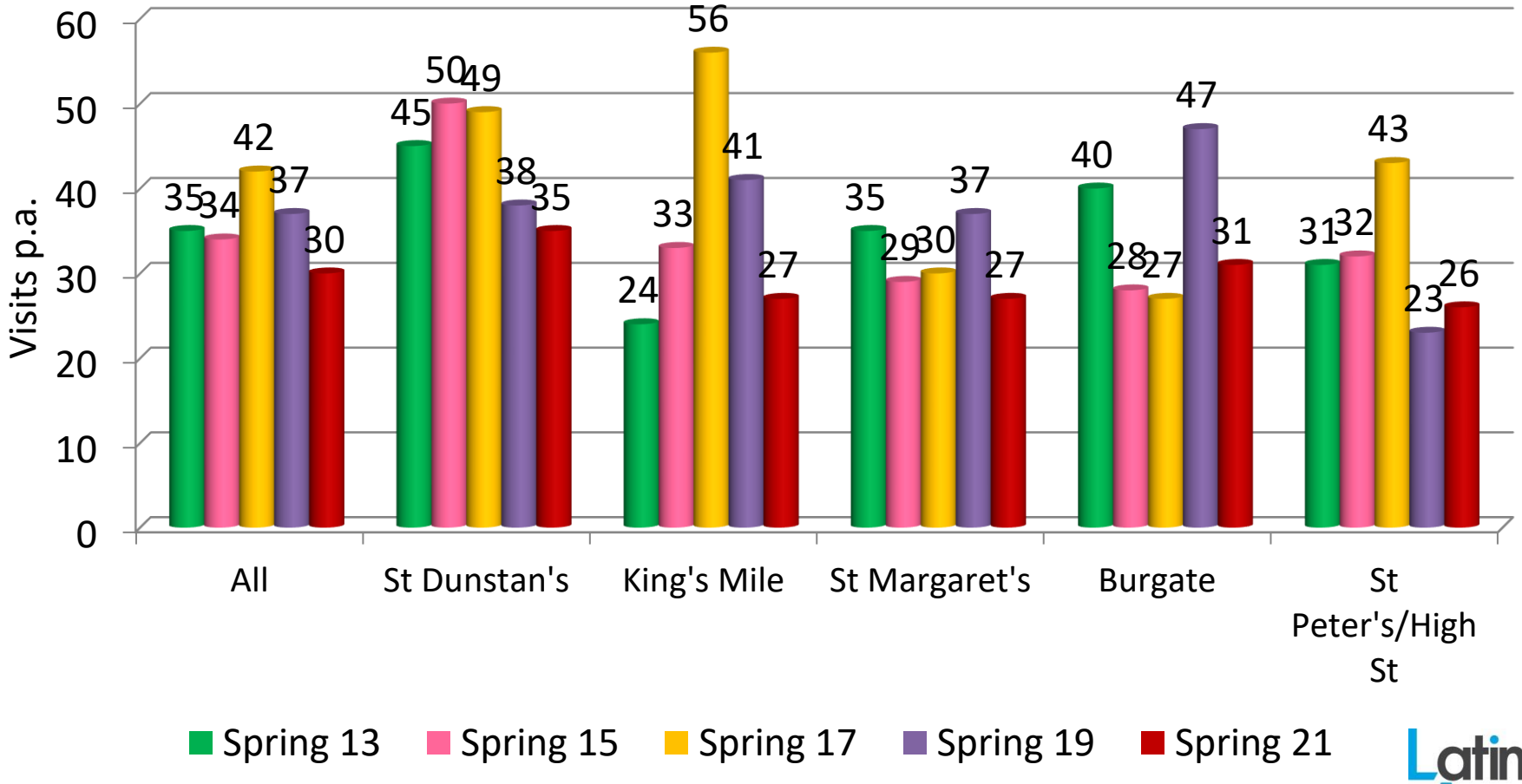
Visit Frequency: Entertainment

How often do you visit Canterbury for entertainment?

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



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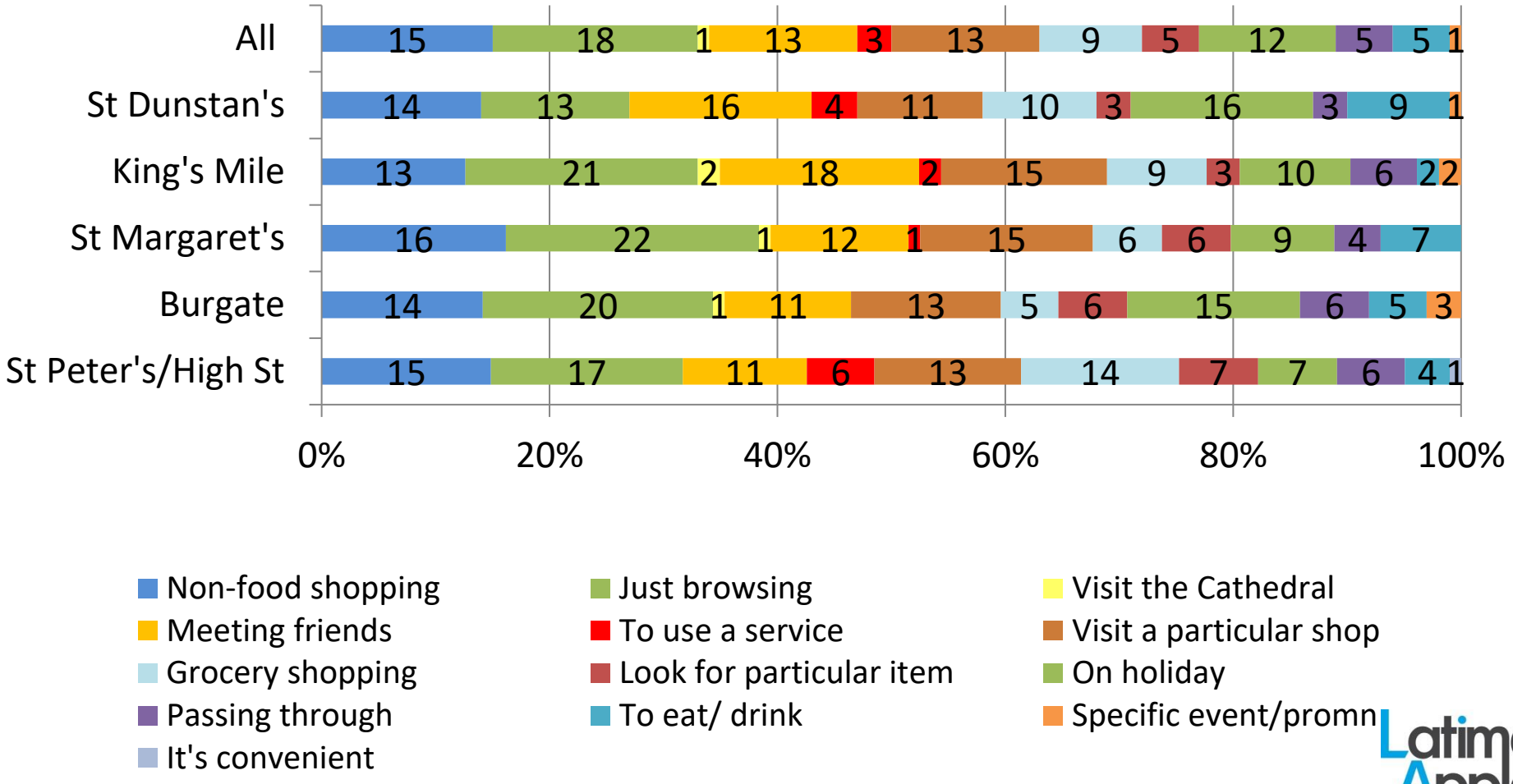
Main Reason for Visit (Spring 21)

What was your main reason for being here today?

(n = all respondents)



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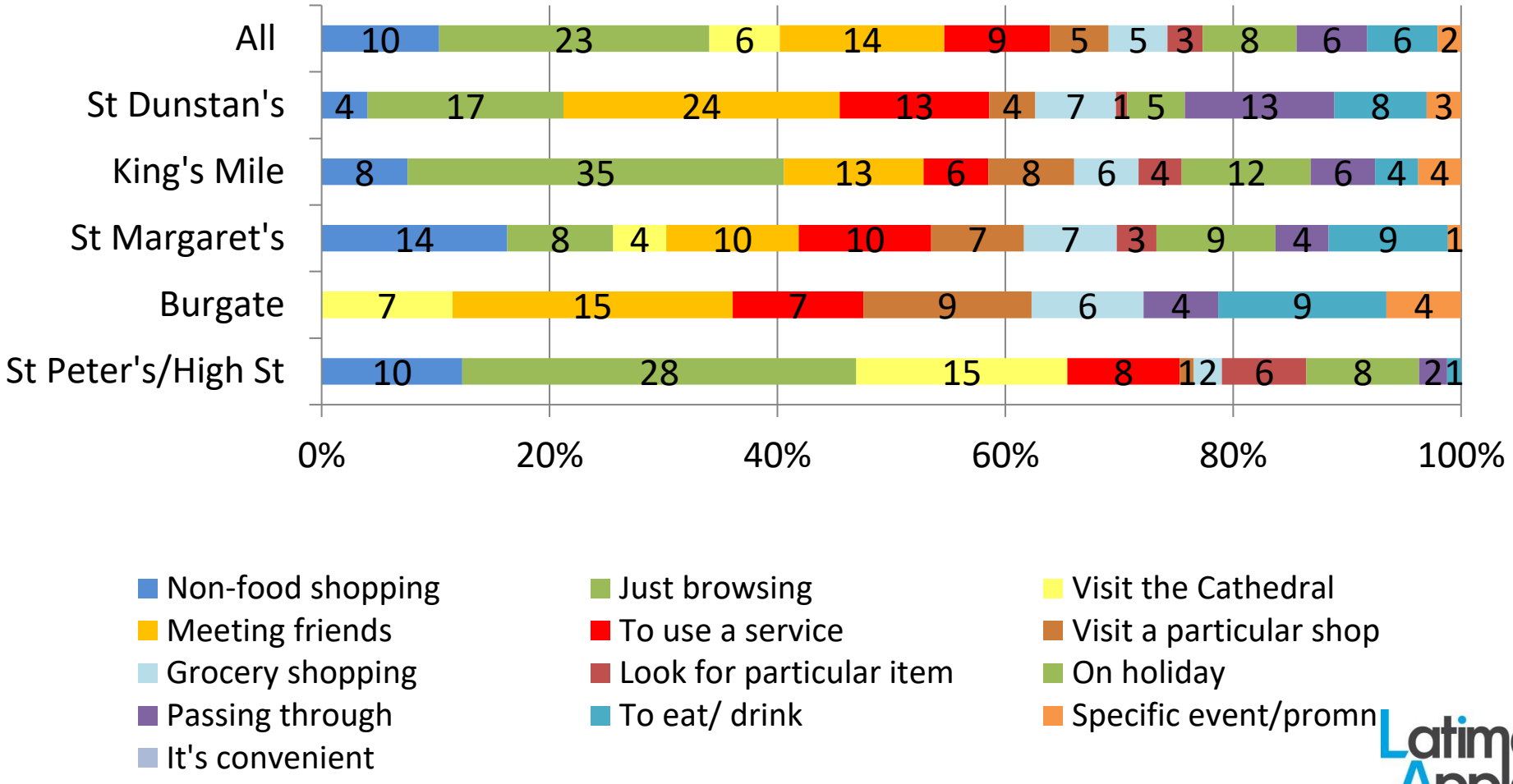
Main Reason for Visit (Spring 19)

What was your main reason for being here today?

(n = all respondents)



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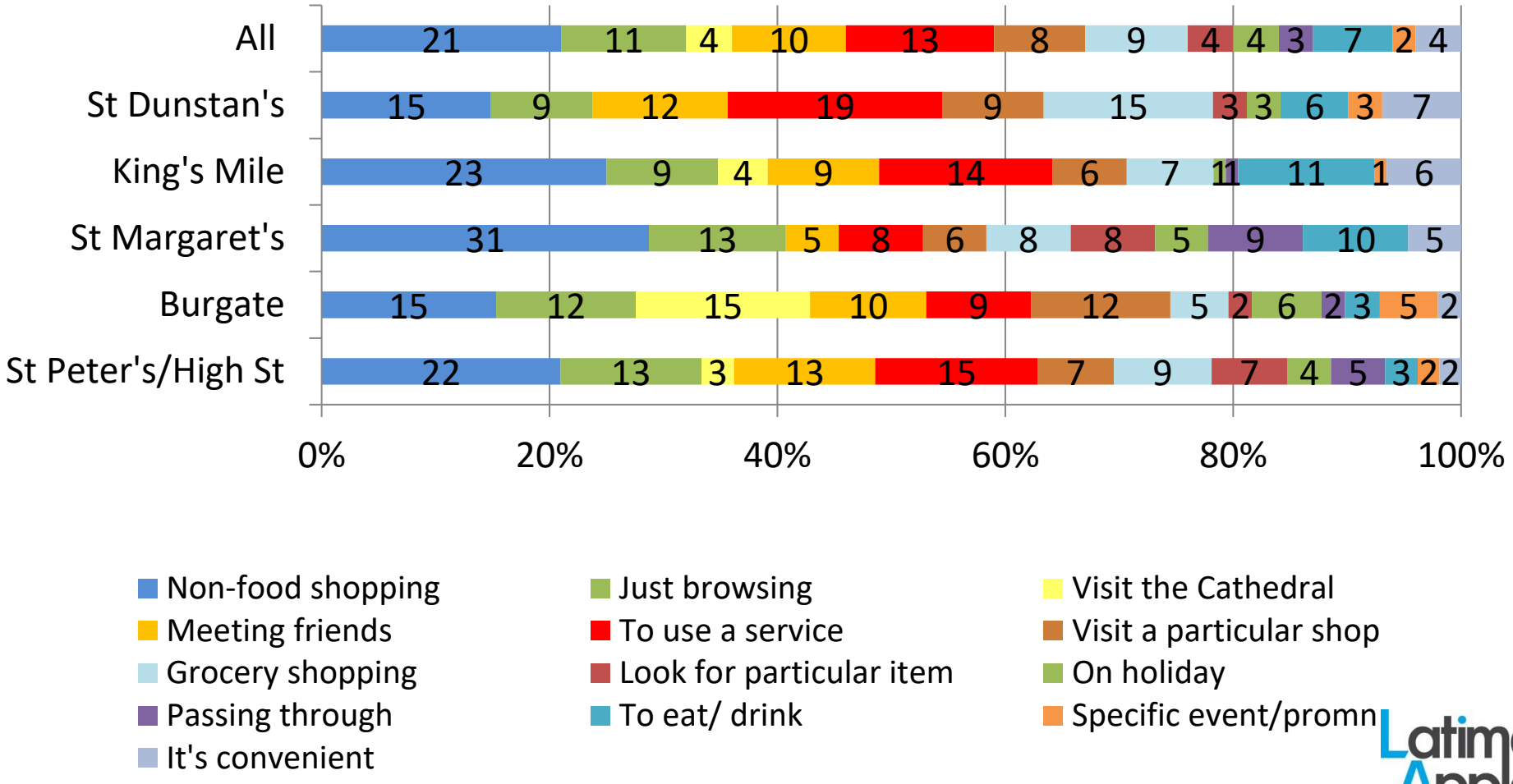
Main Reason for Visit (Spring 17)

What was your main reason for being here today?

(n = all respondents)



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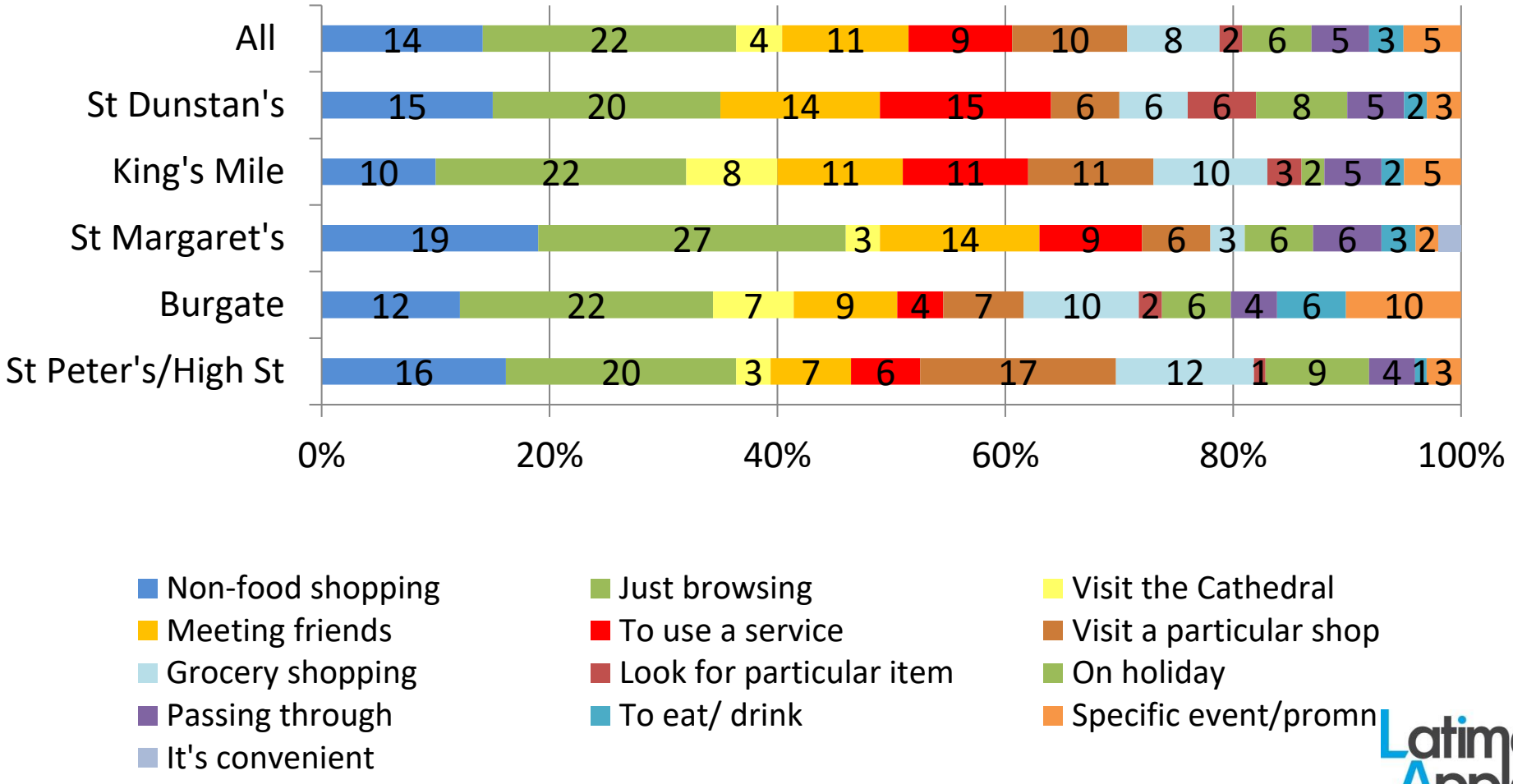
Main Reason for Visit (Spring 15)

What was your main reason for being here today?

(n = all respondents)



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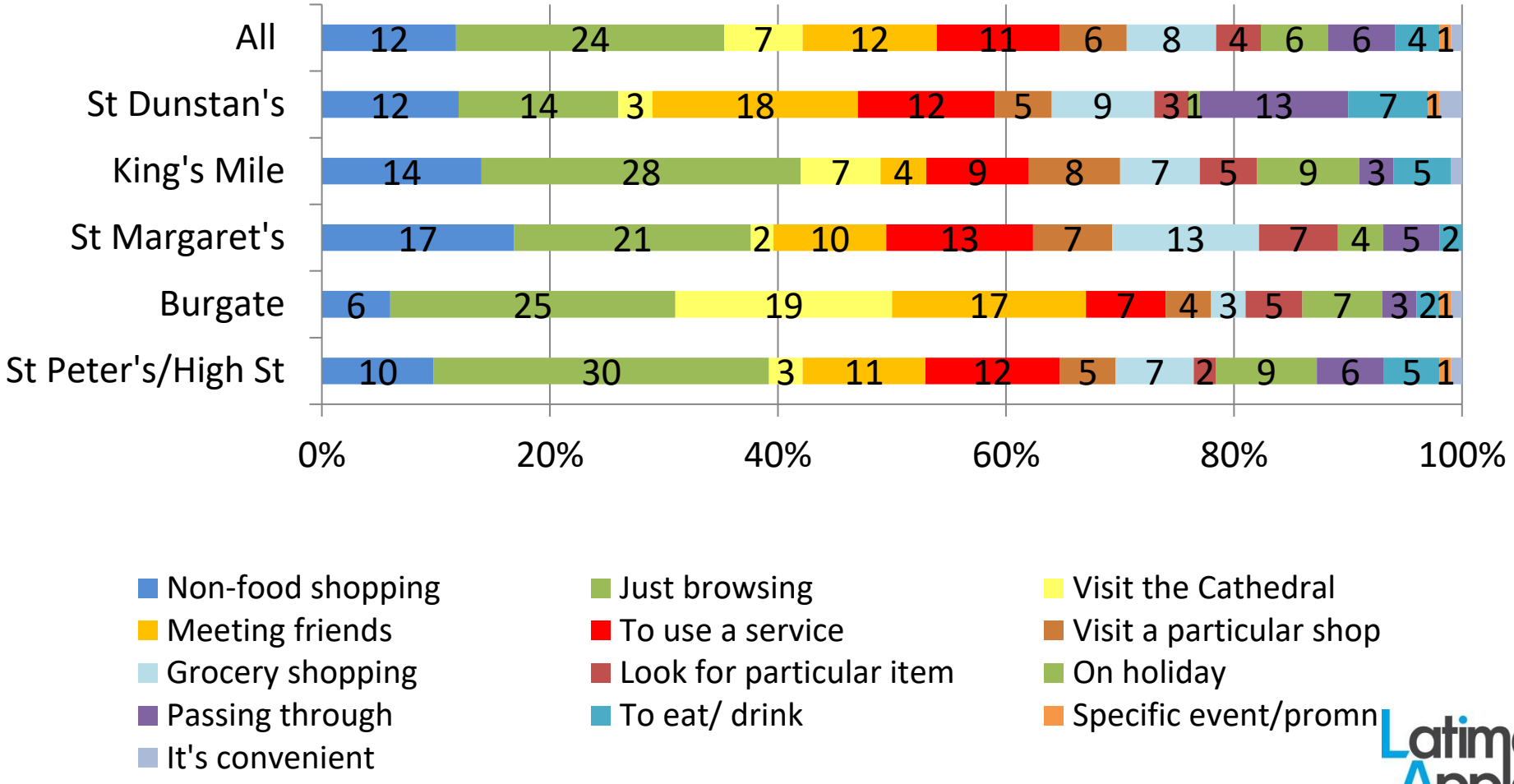
Main Reason for Visit (Spring 13)

What was your main reason for being here today?

(n = all respondents)



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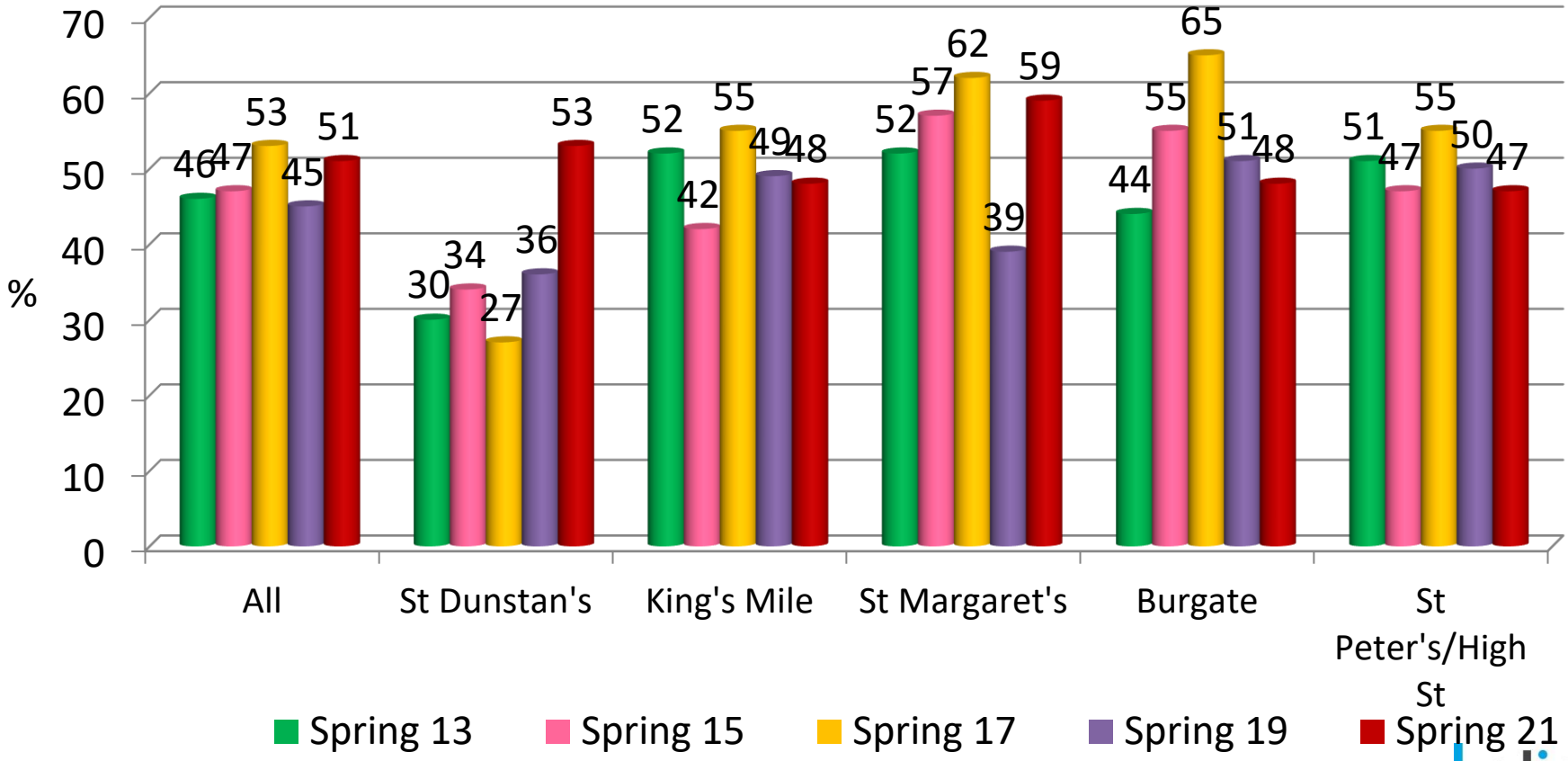
Non-food Conversion

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

(n = all respondents)



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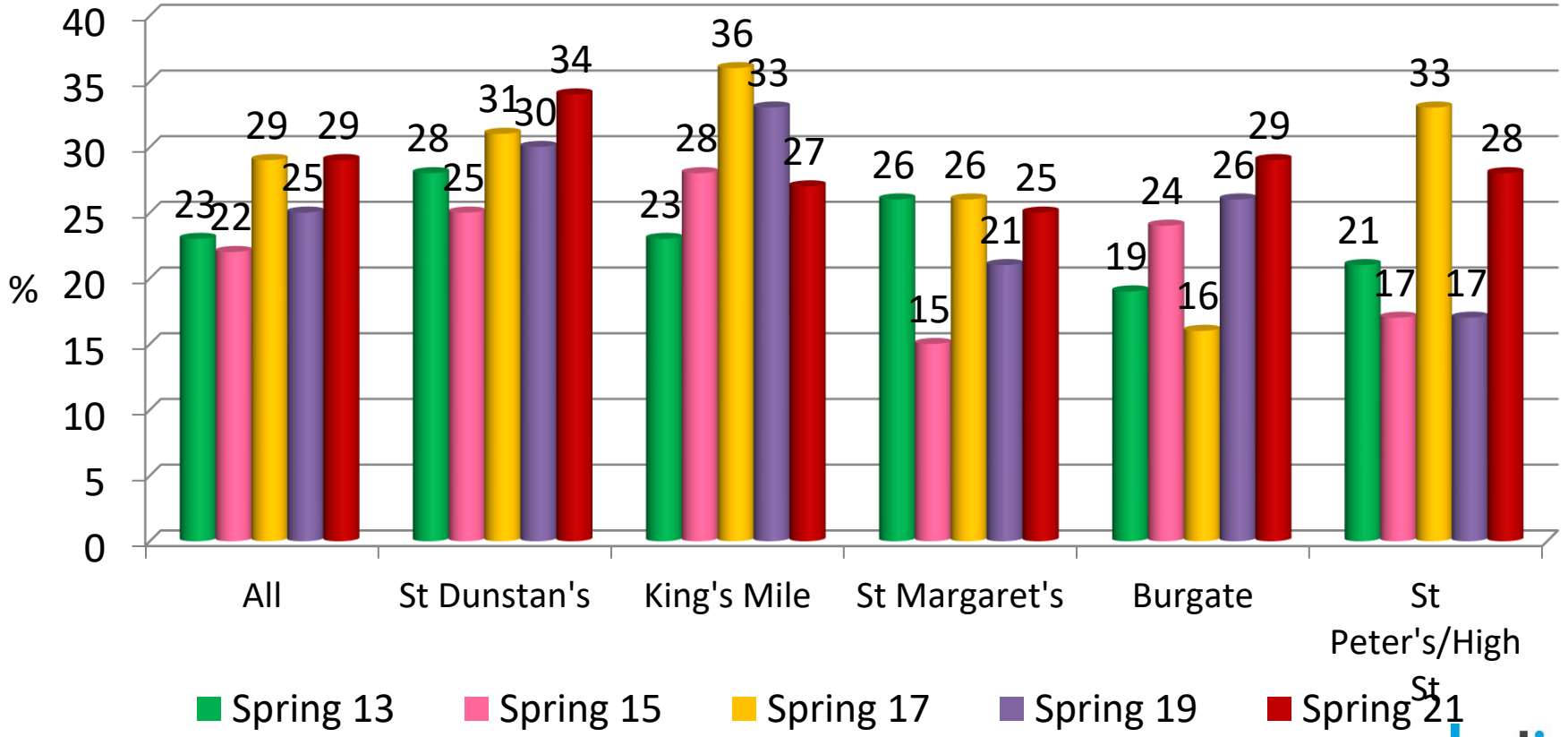
Grocery Conversion

Proportion making grocery purchases in Canterbury city centre today?

(n = all respondents)



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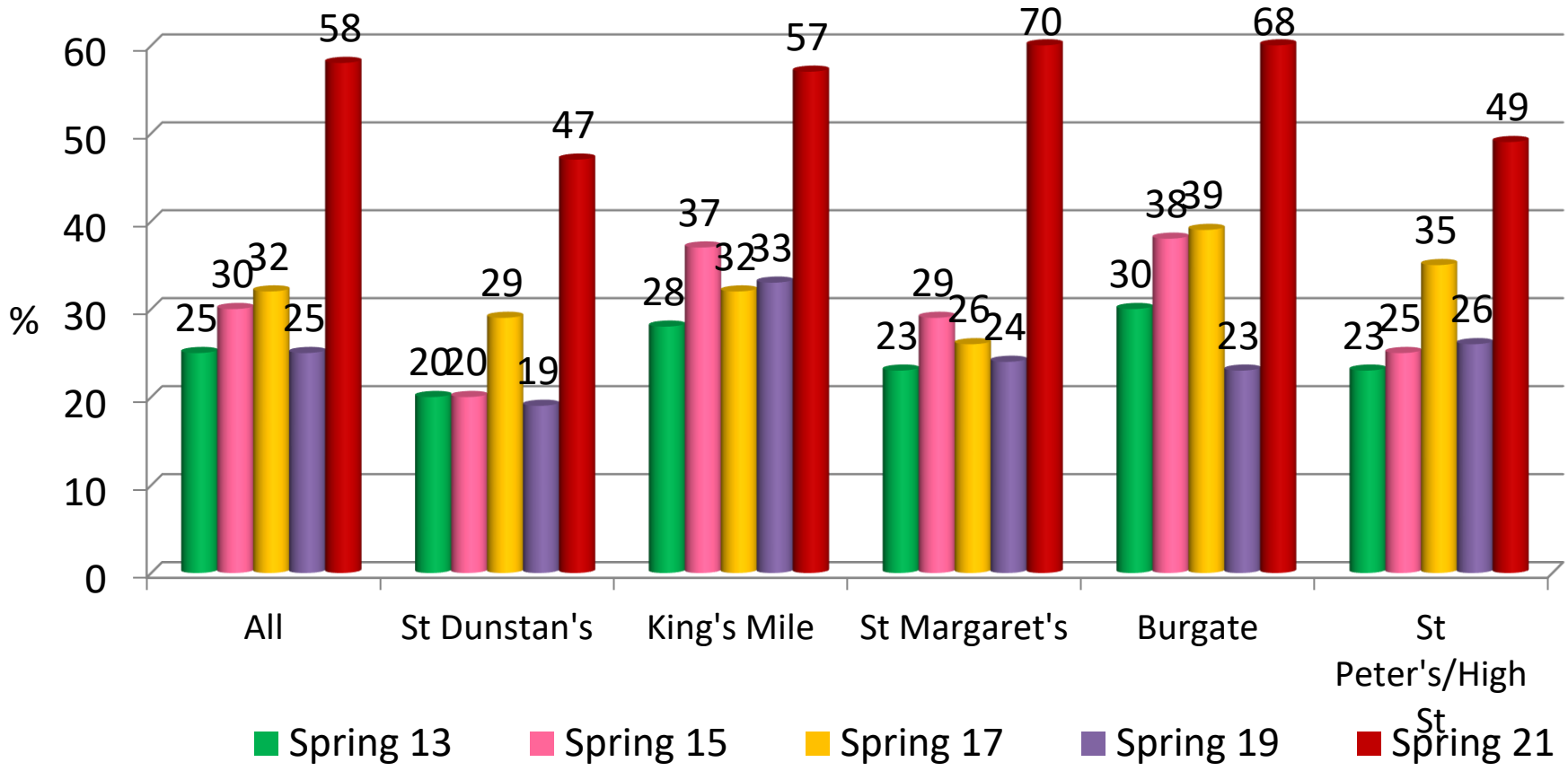
Entertainment Conversion

Proportion making entertainment purchases in Canterbury city centre today?

(n = all respondents)



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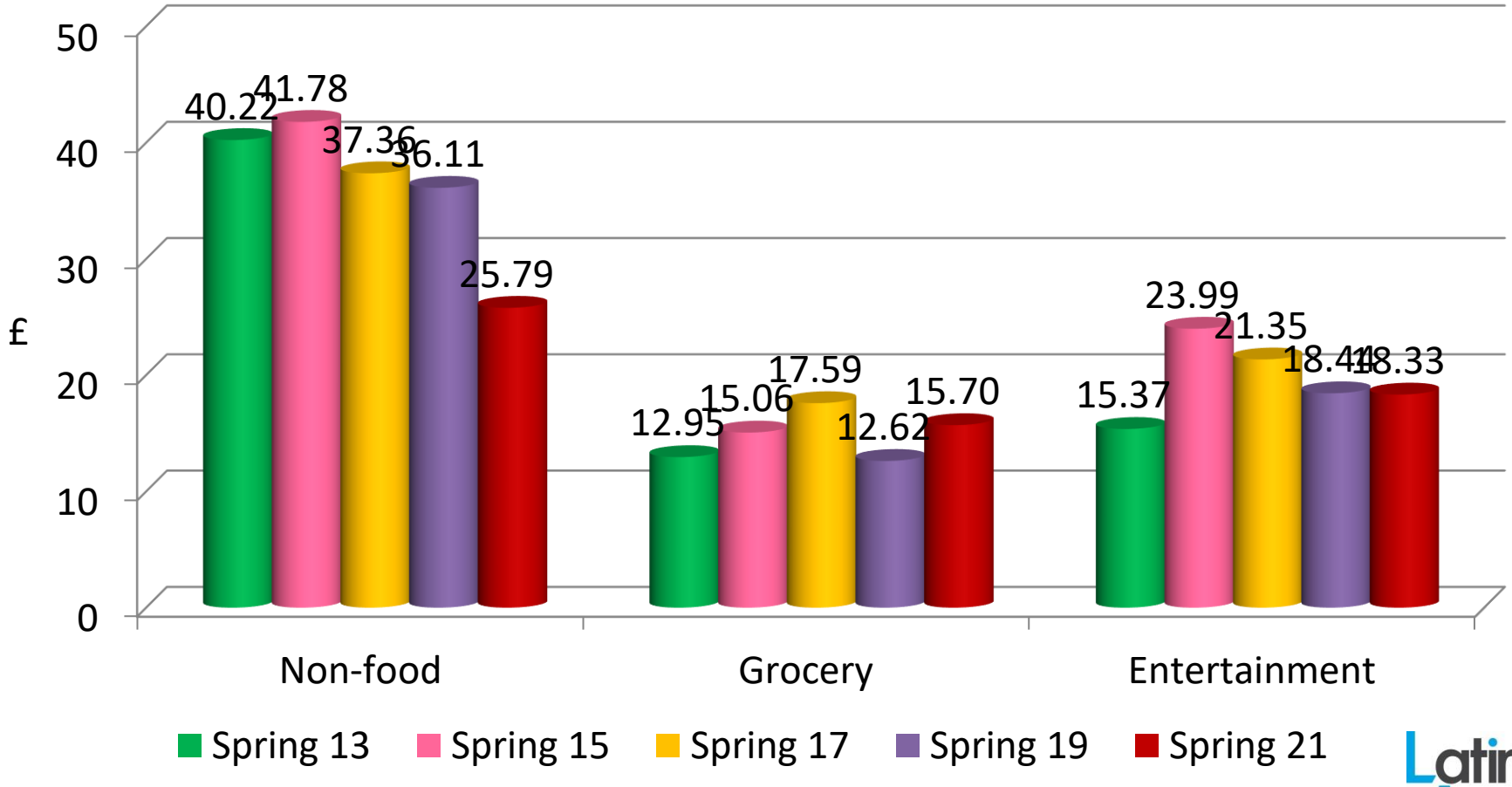
Average Party Spend

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

(n = those who have spent on each category)



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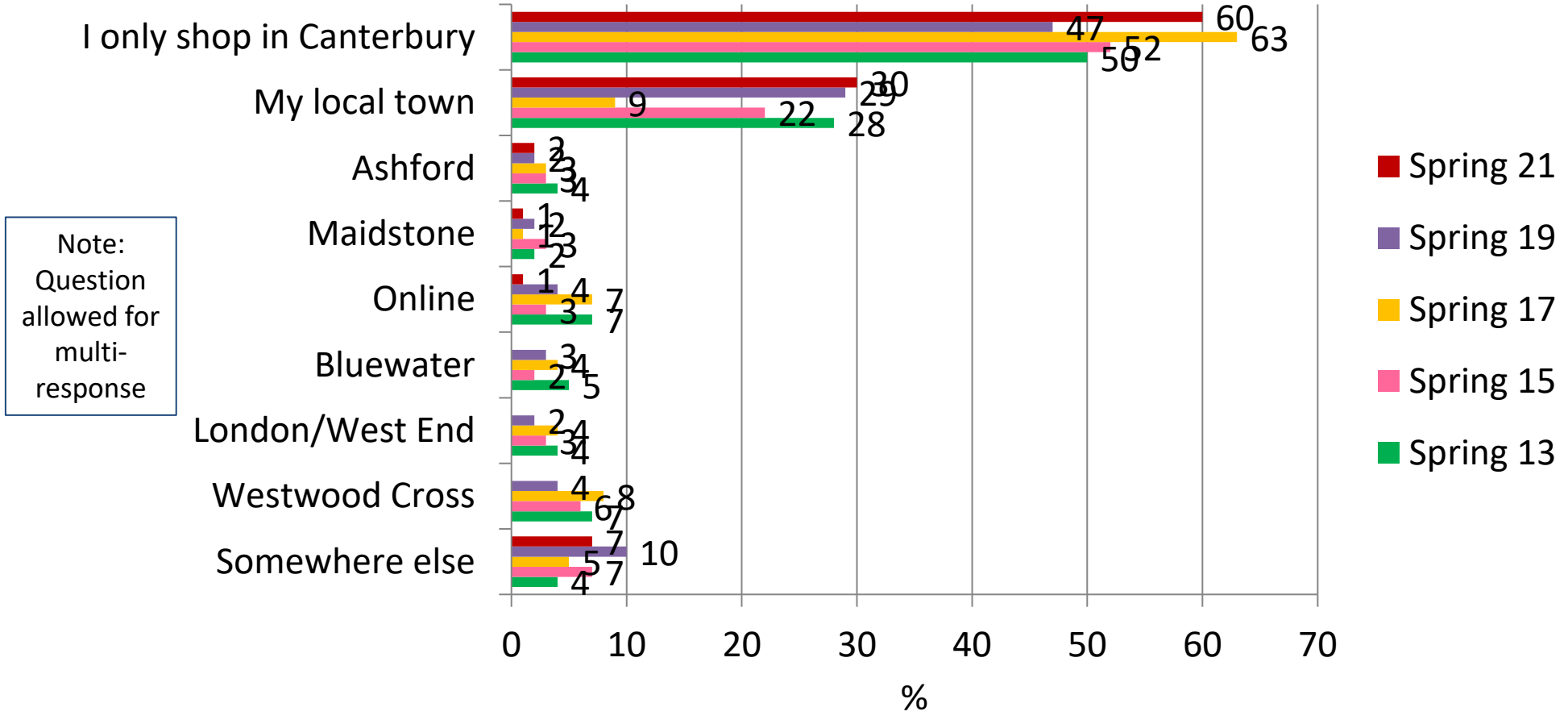
Alternative Purchase Location

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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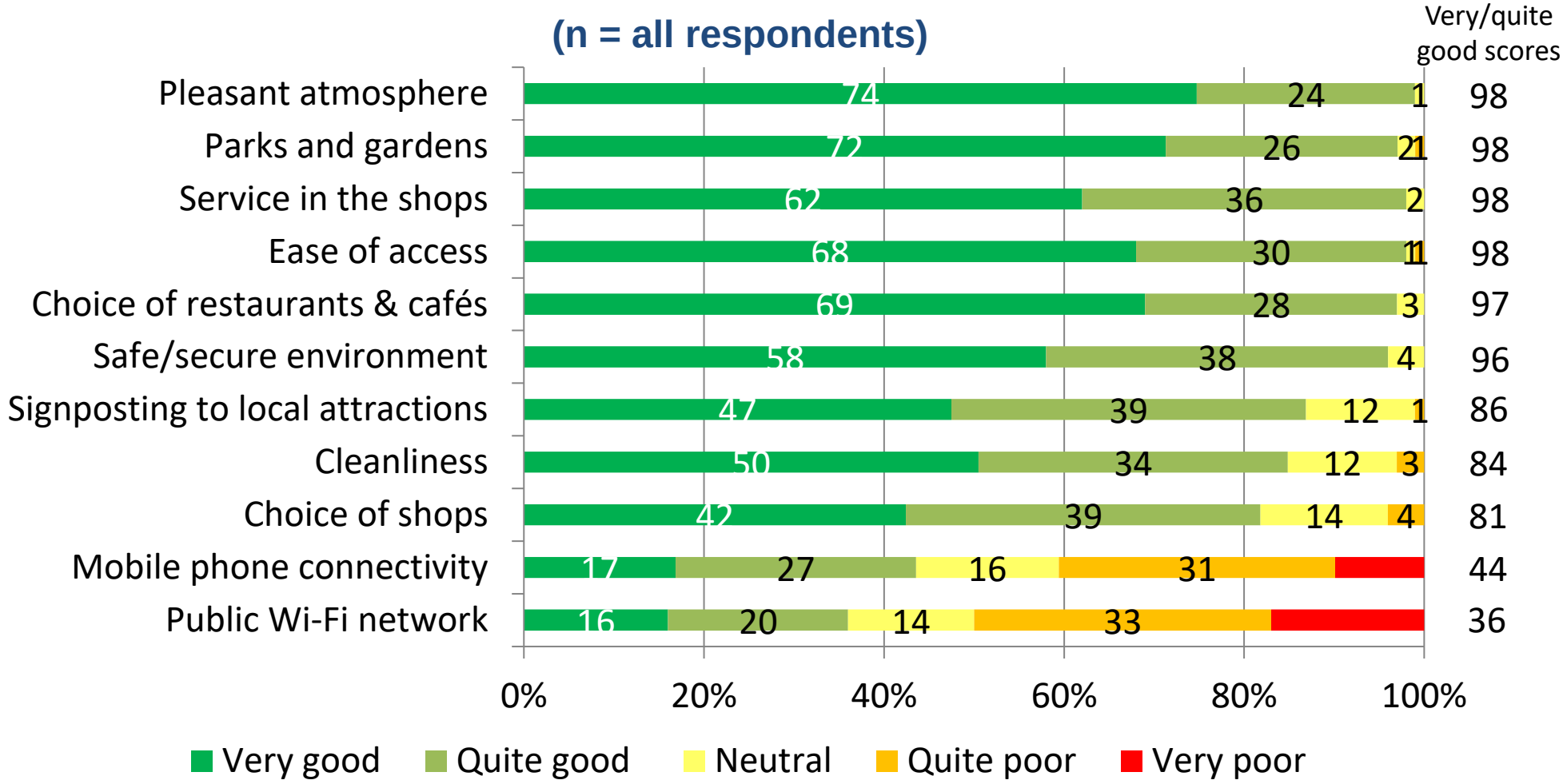
City centre Ratings (Spring 21)

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

(n = all respondents)



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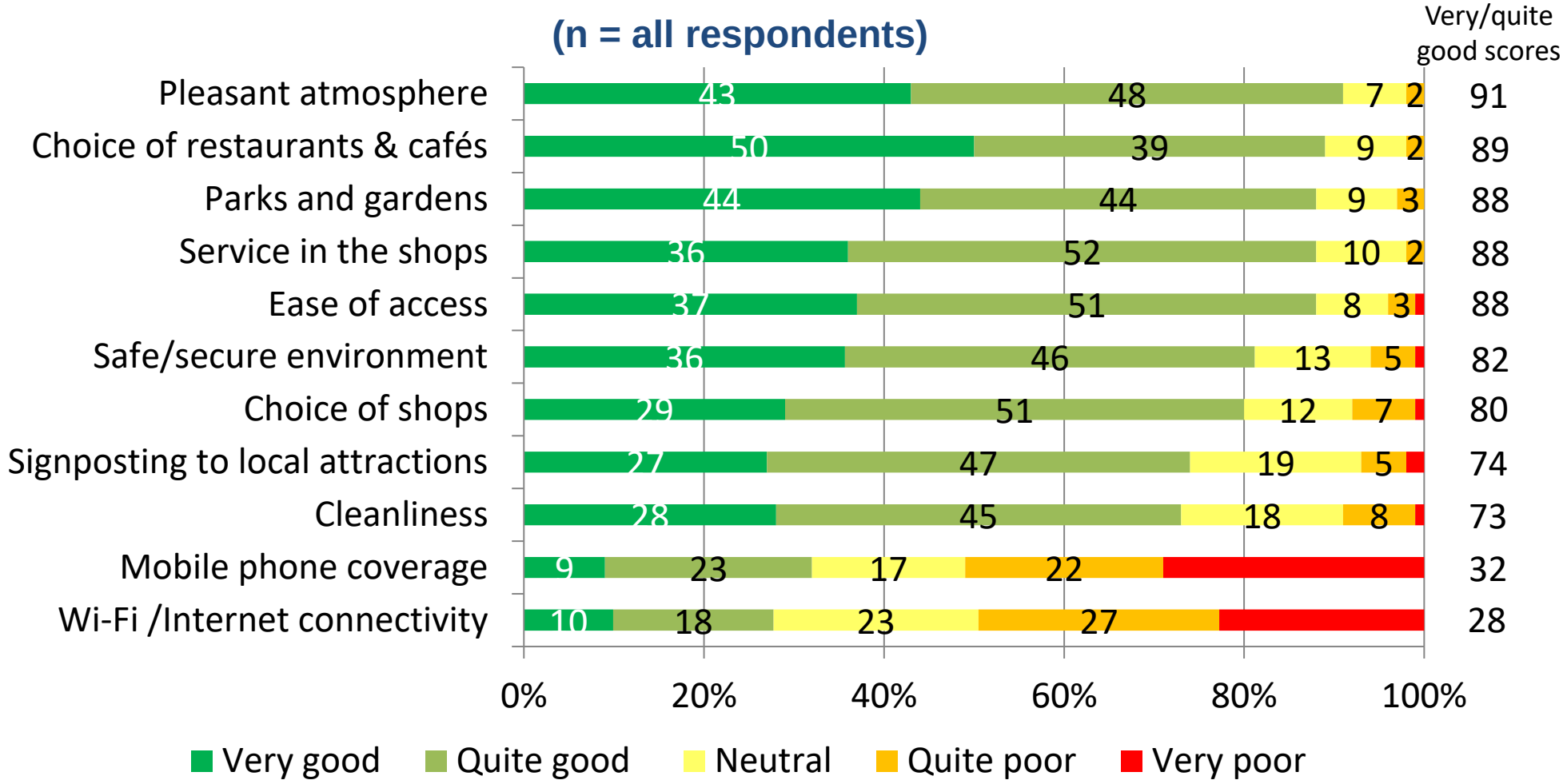
City centre Ratings (Spring 19)

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

(n = all respondents)



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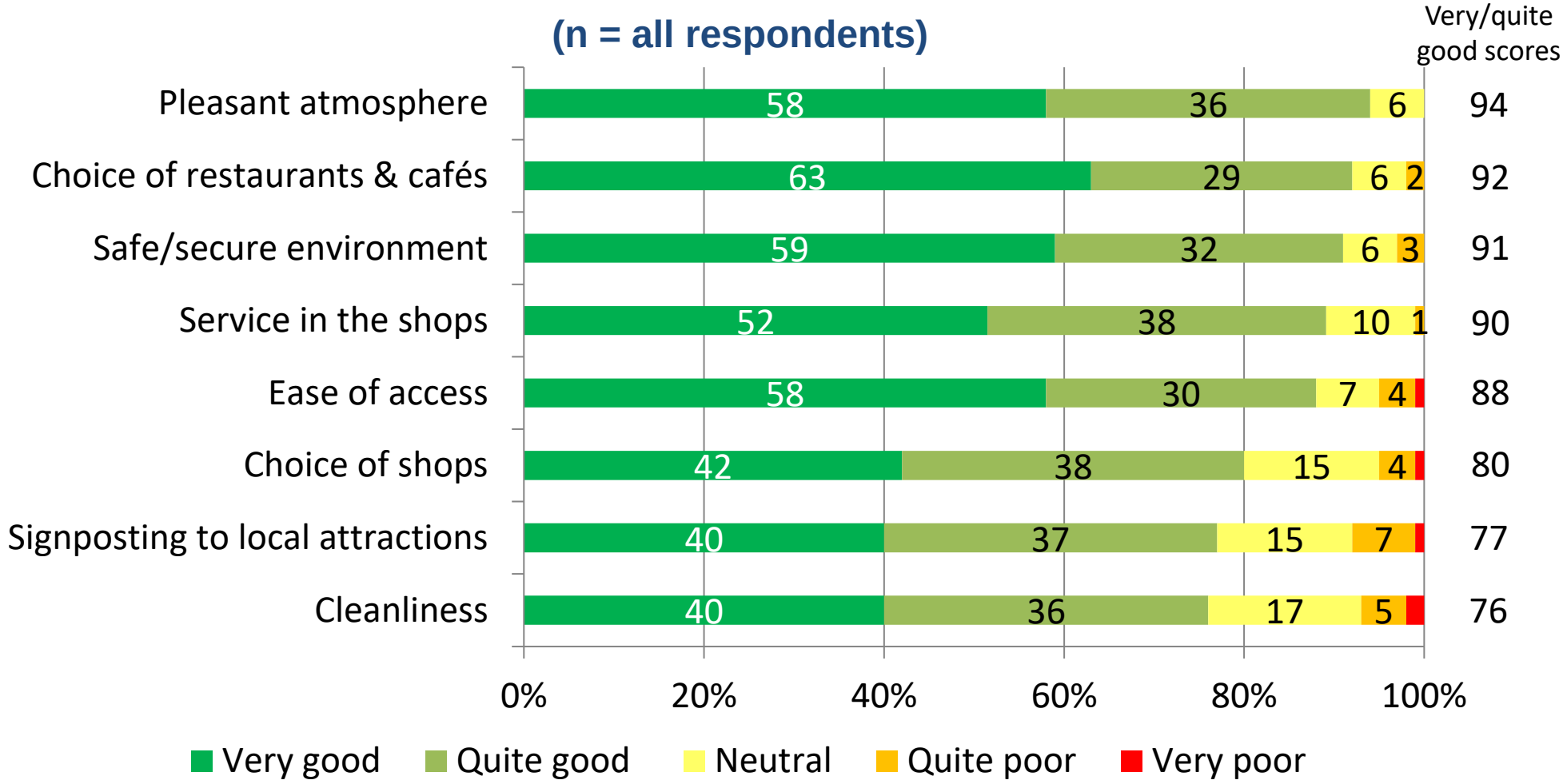
City centre Ratings (Spring 17)

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

(n = all respondents)



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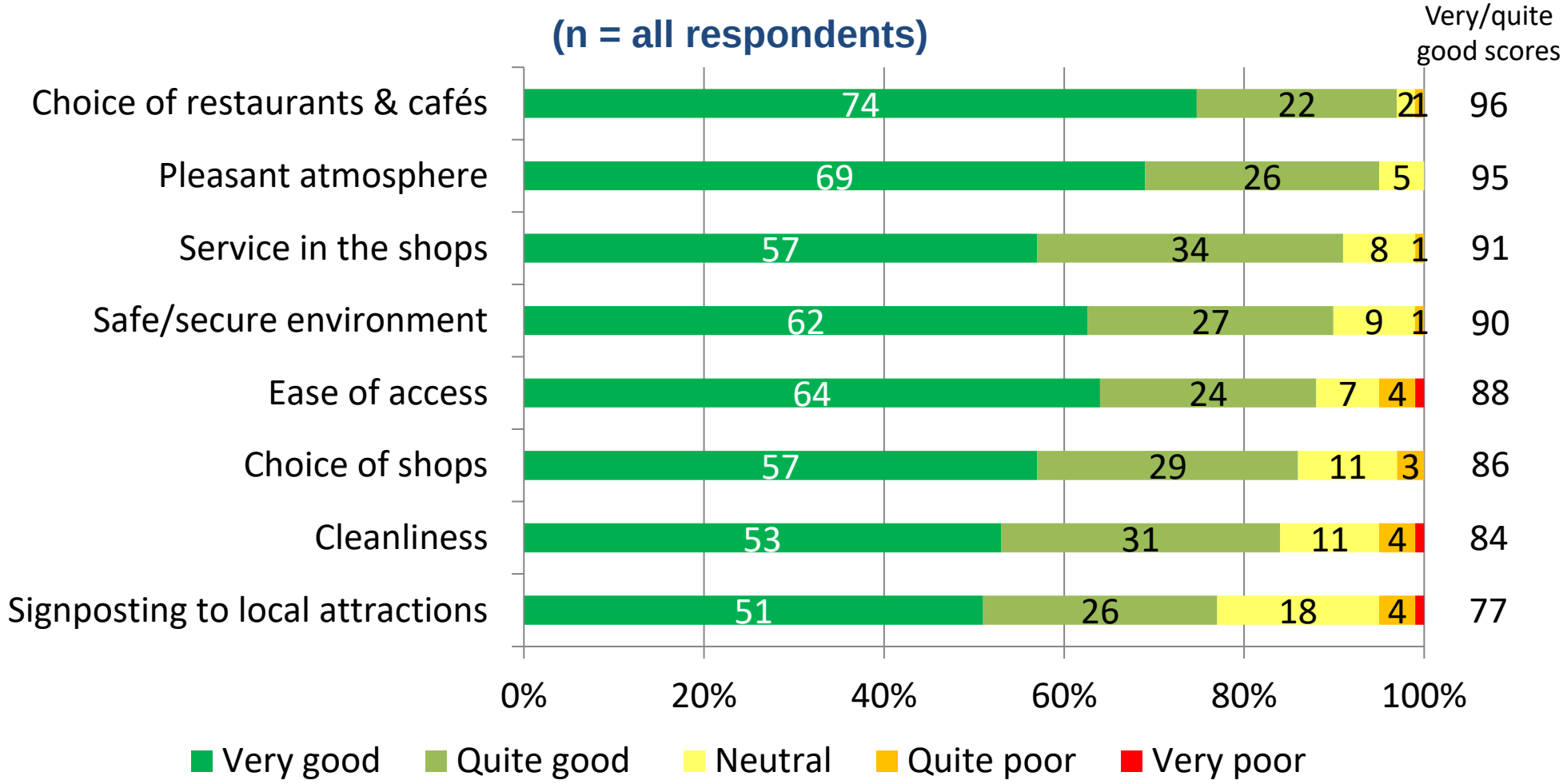
City centre Ratings (Spring 15)

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

(n = all respondents)



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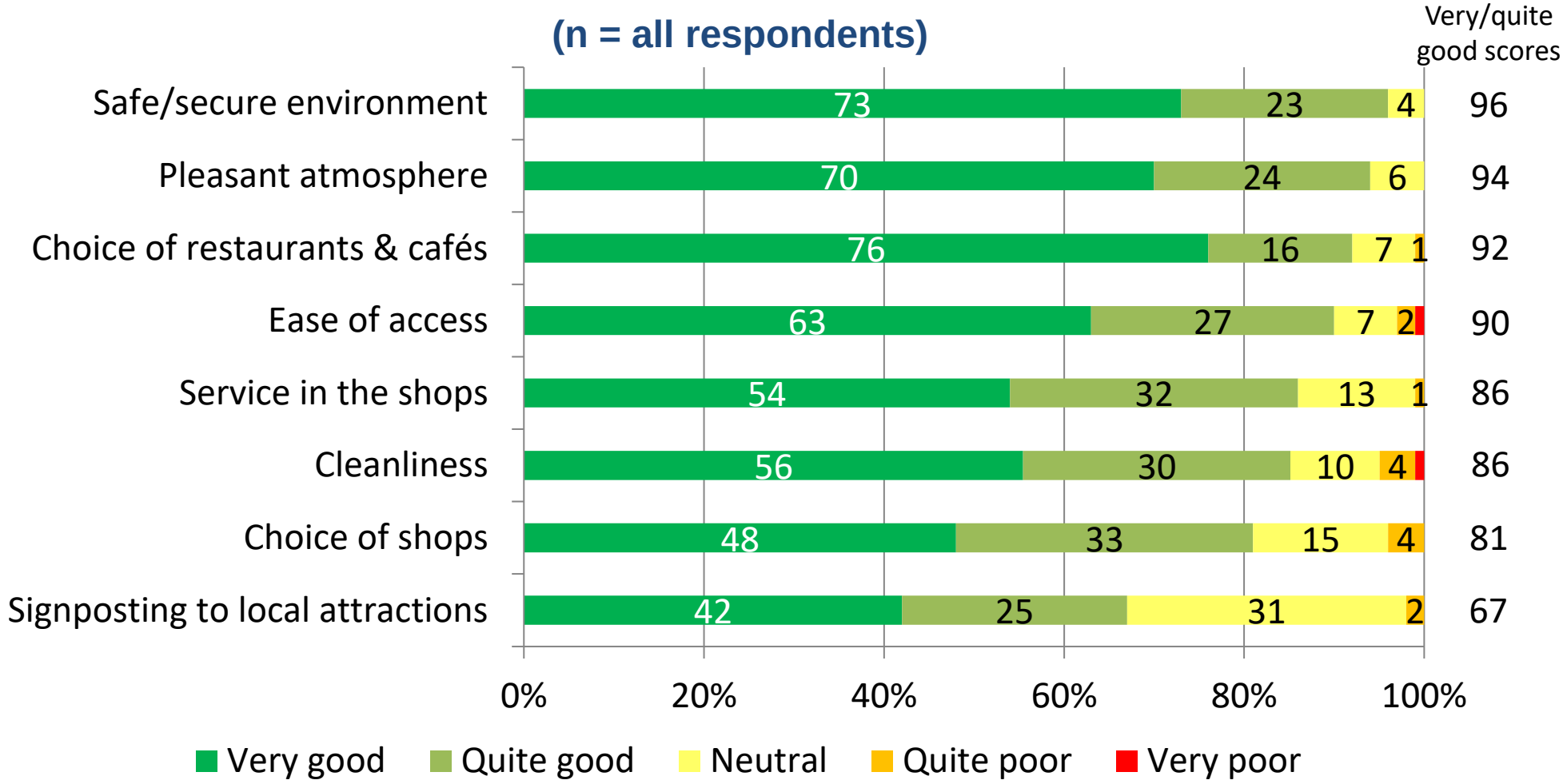
City centre Ratings (Spring 13)

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

(n = all respondents)



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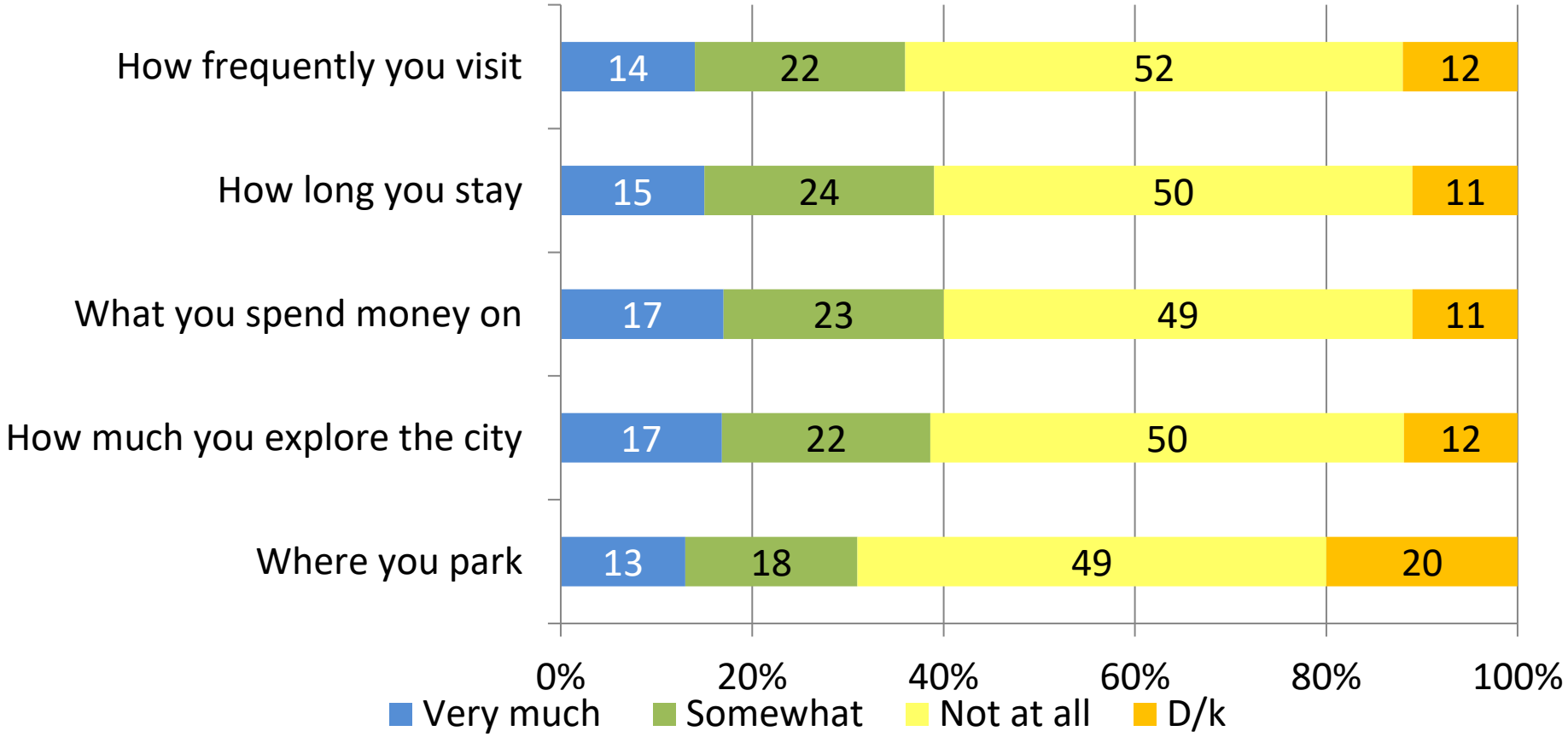
Public Wi-Fi (Spring 21)

To what extent does the Public Wi-Fi impact on any of the following when you visit Canterbury?

(n = all respondents)



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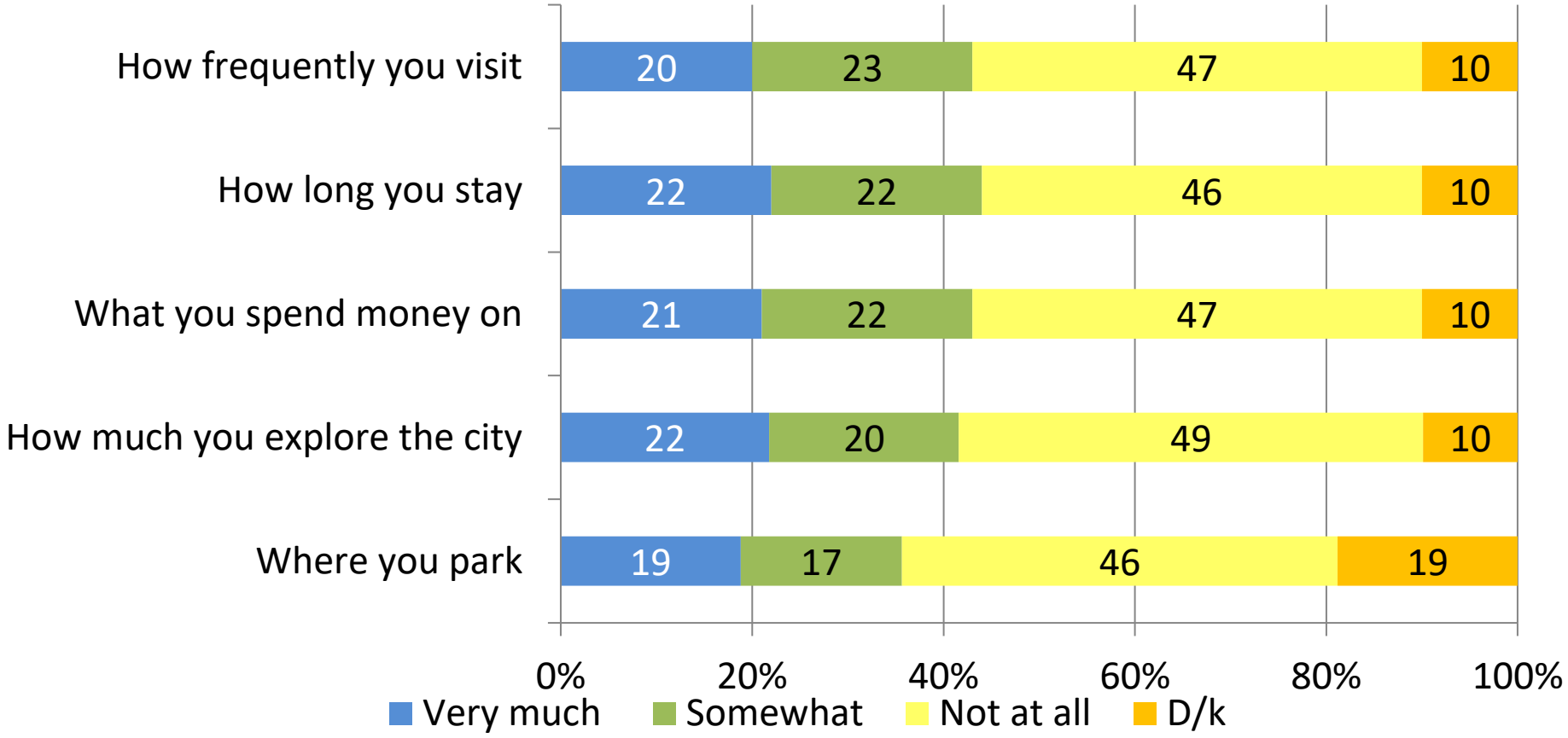
Mobile phone (Spring 21)

To what extent does the Mobile phone connectivity impact on any of the following when you visit Canterbury?

(n = all respondents)



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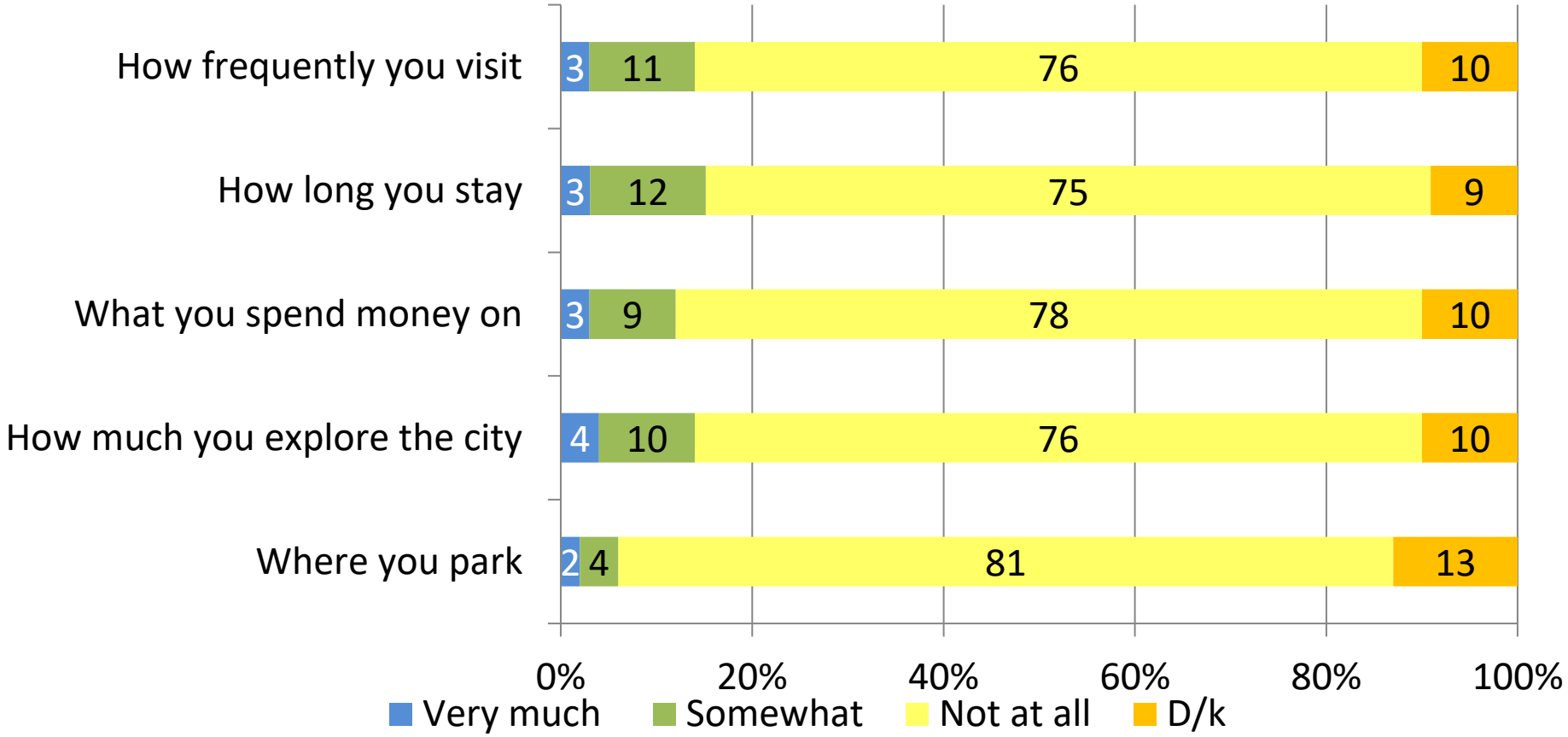
Wi-Fi / Phone connectivity (Spring 19)

To what extent does the Wi-Fi/ phone connectivity impact on any of the following when you visit Canterbury?

(n = all respondents)



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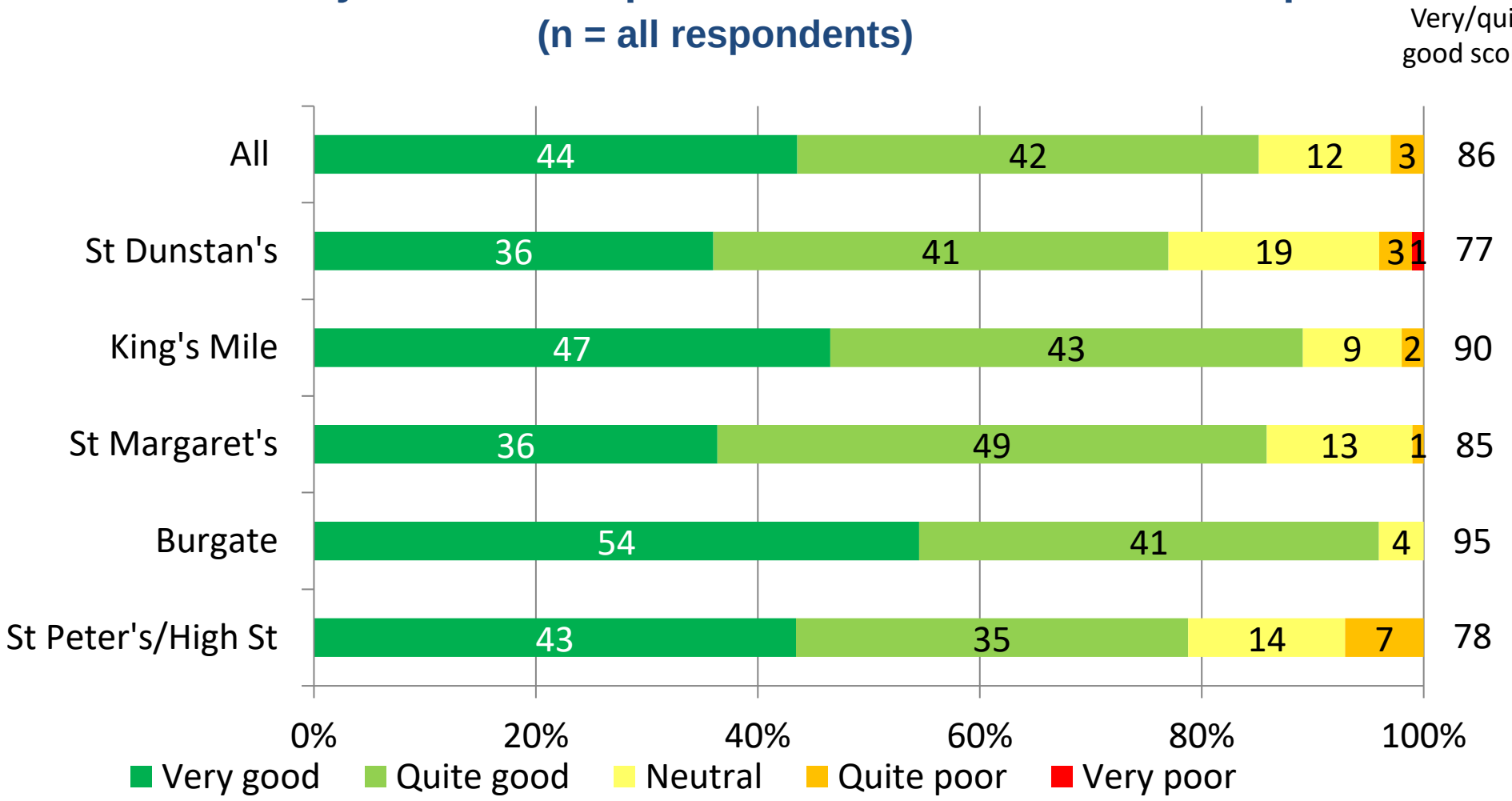
Area ratings: Choice of shops (Spring 21)

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



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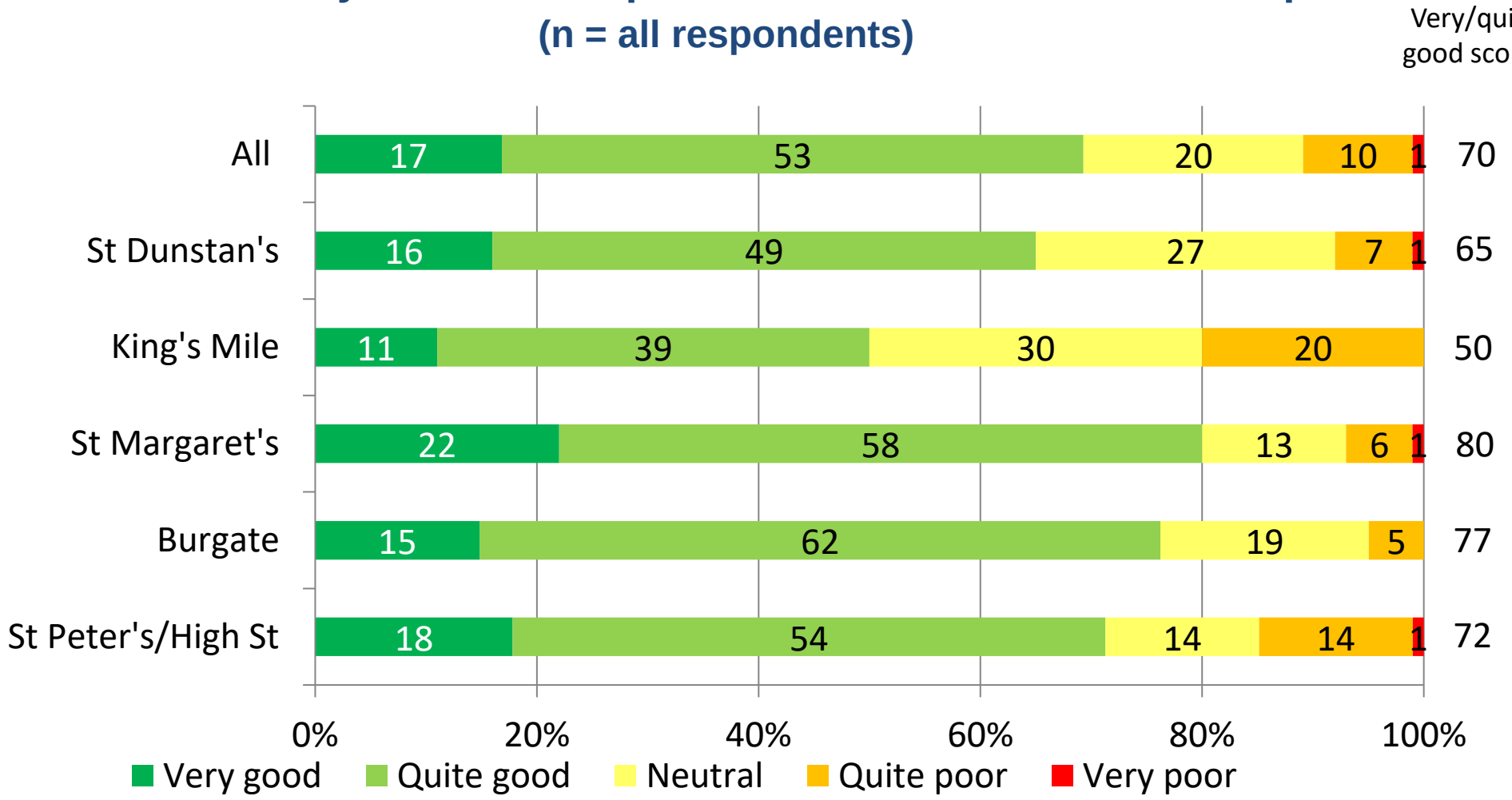
Area ratings: Choice of shops (Spring 19)

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

(n = all respondents)



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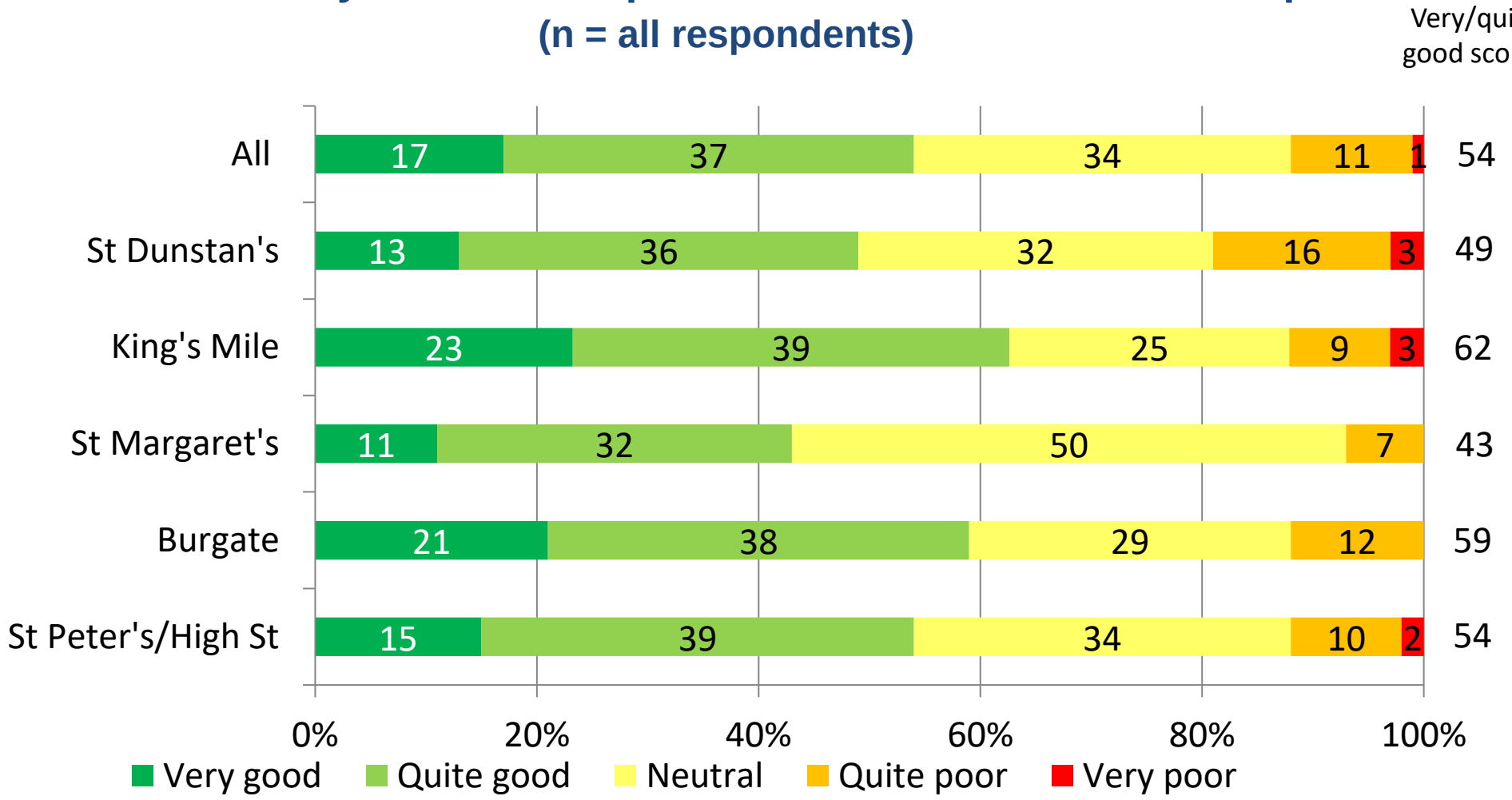
Area ratings: Choice of shops (Spring 17)

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

(n = all respondents)



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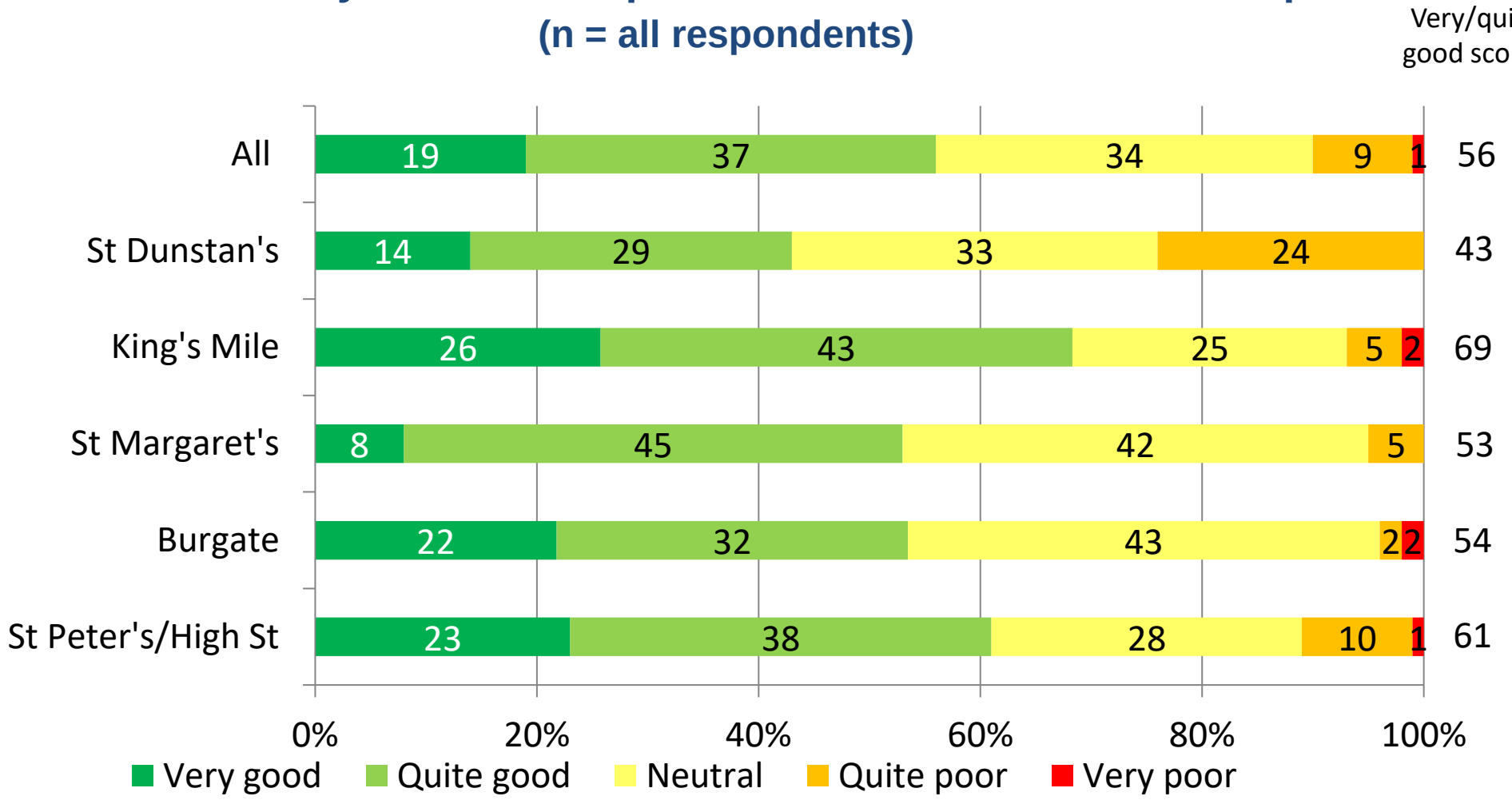
Area ratings: Choice of shops (Spring 15)

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

(n = all respondents)



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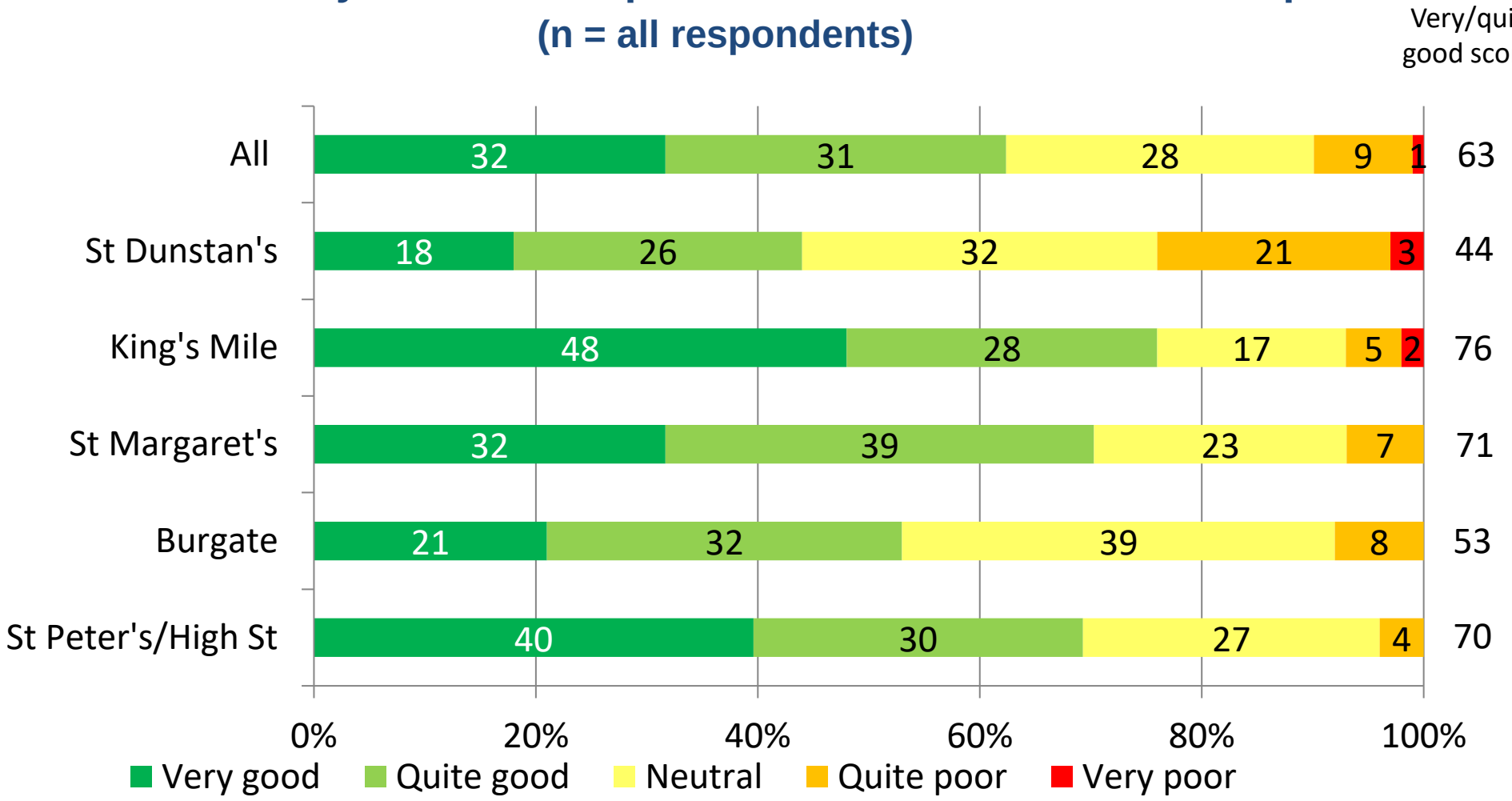
Area ratings: Choice of shops (Spring 13)

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

(n = all respondents)



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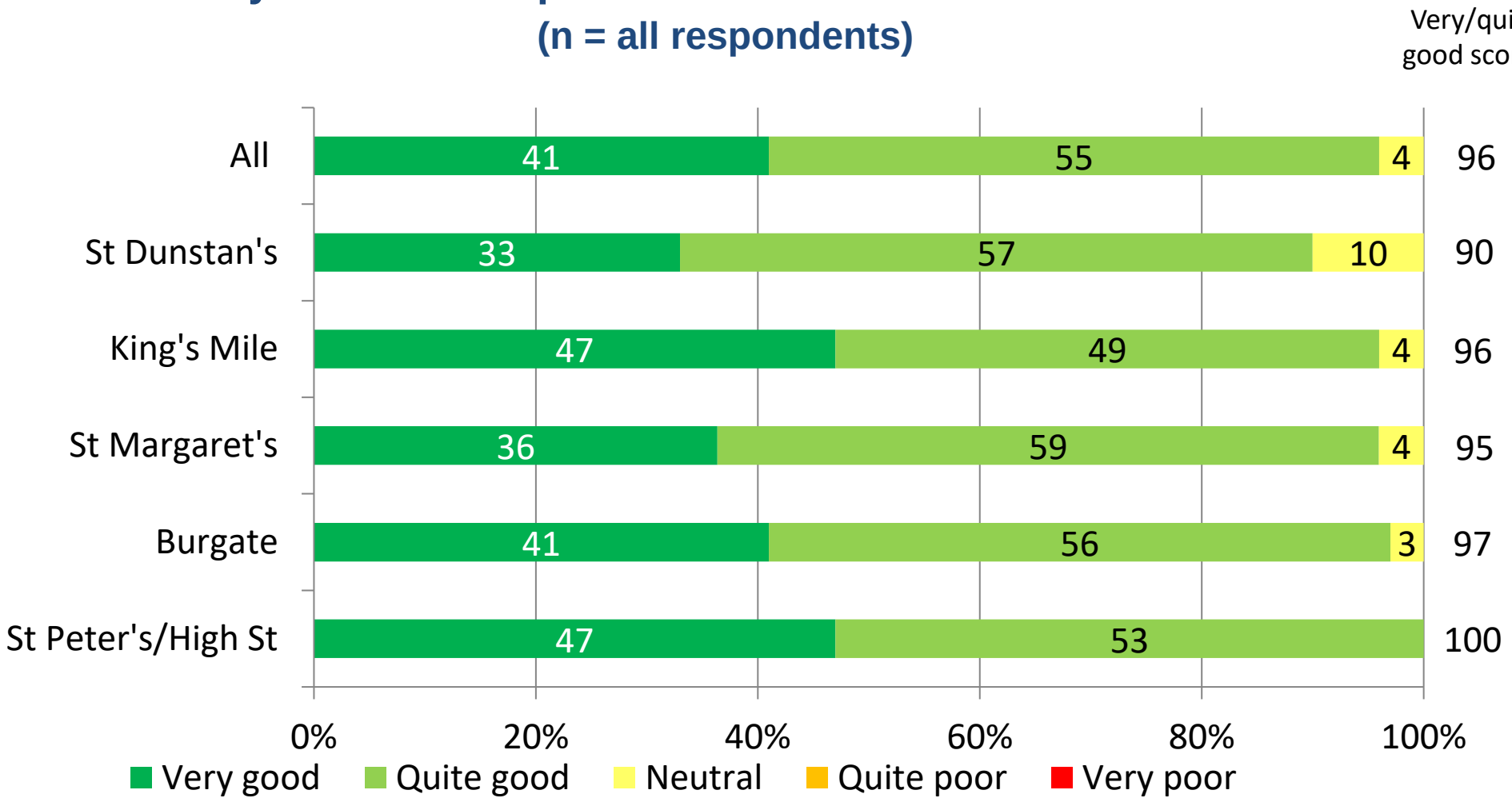
Area ratings: Safety/security (Spring 21)

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

(n = all respondents)



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Area ratings: Safety/security (Spring 19)

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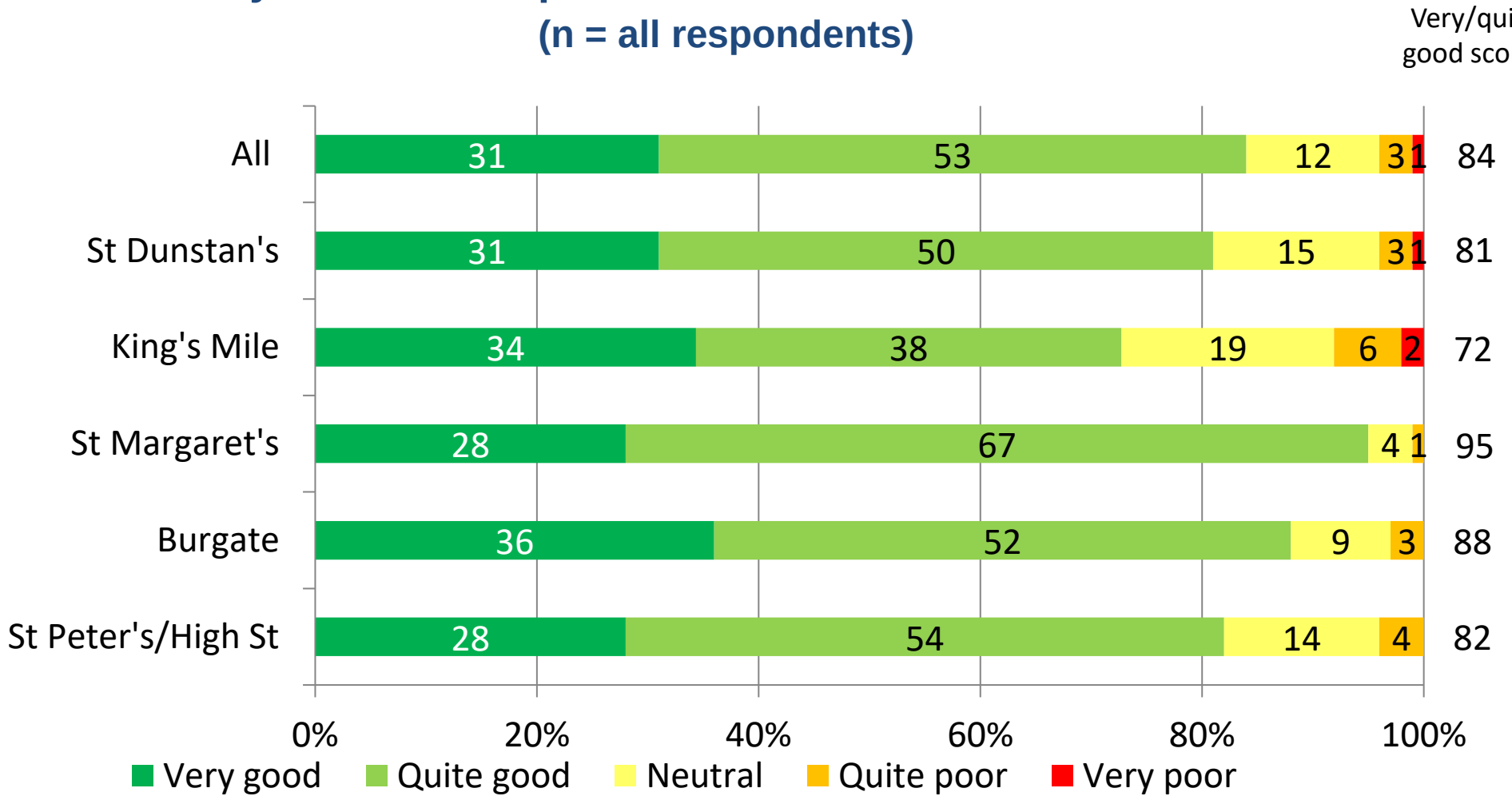
(n = all respondents)



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Area ratings: Safety/security (Spring 17)

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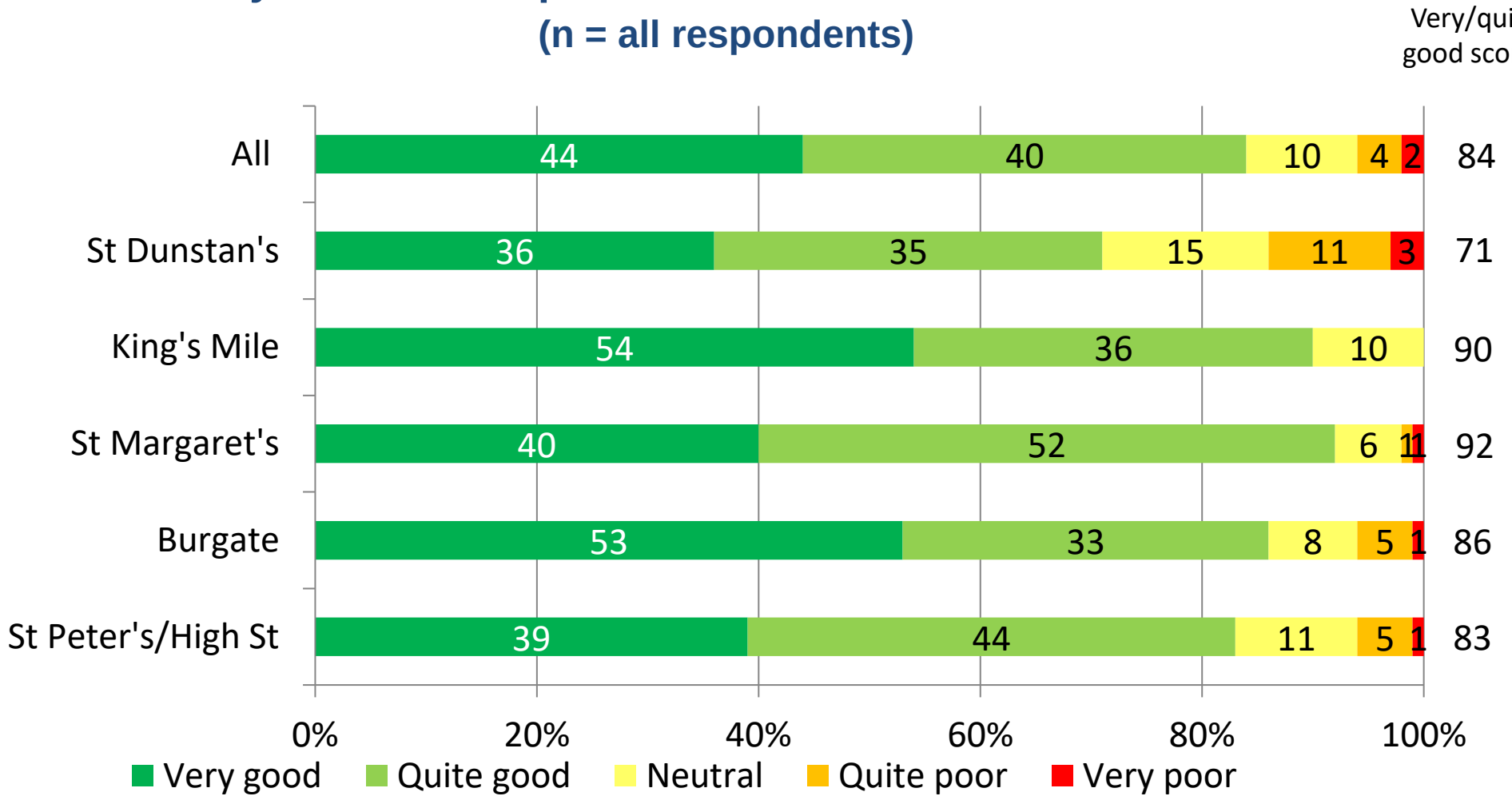

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Area ratings: Safety/security (Spring 15)

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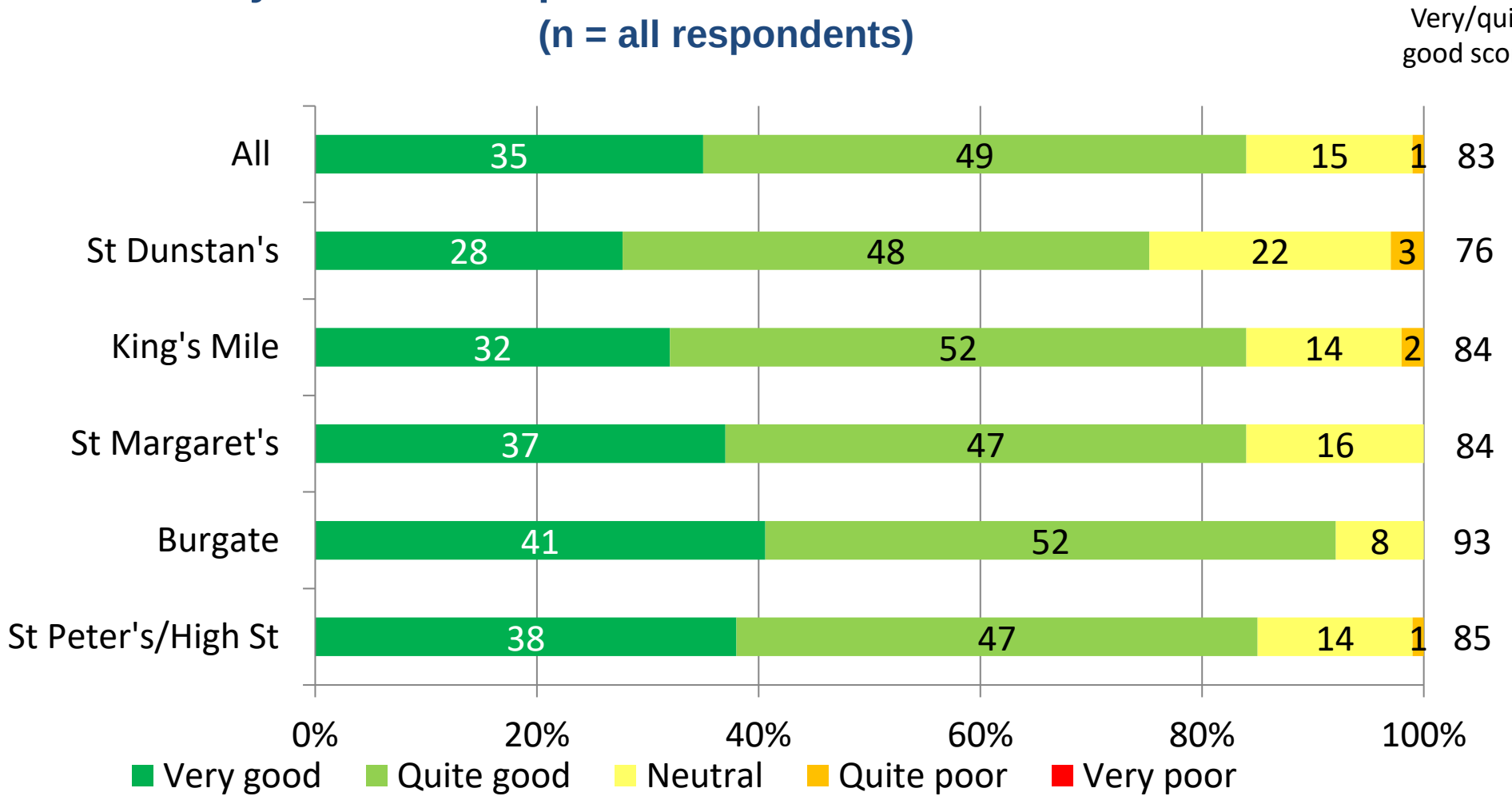

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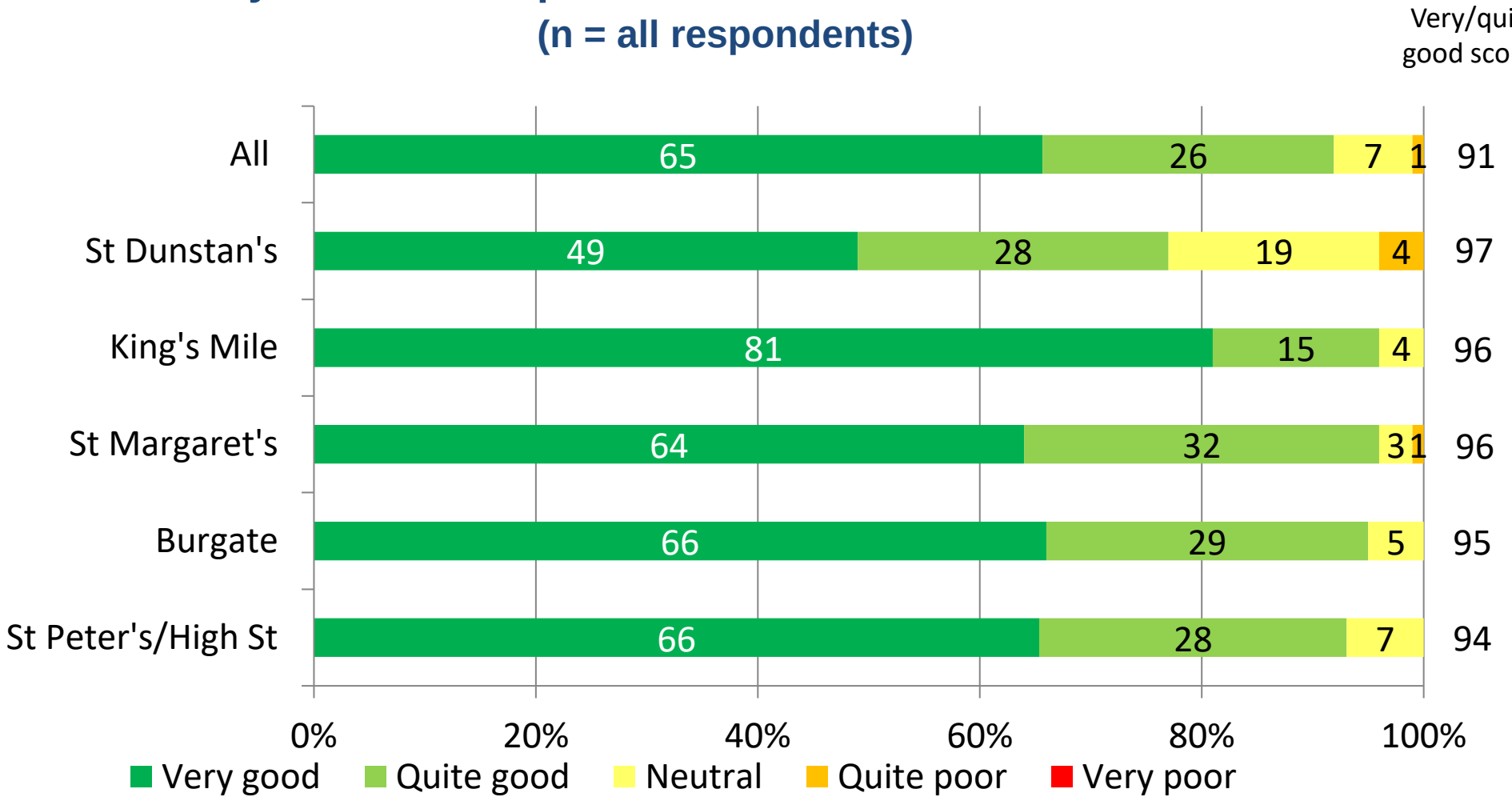

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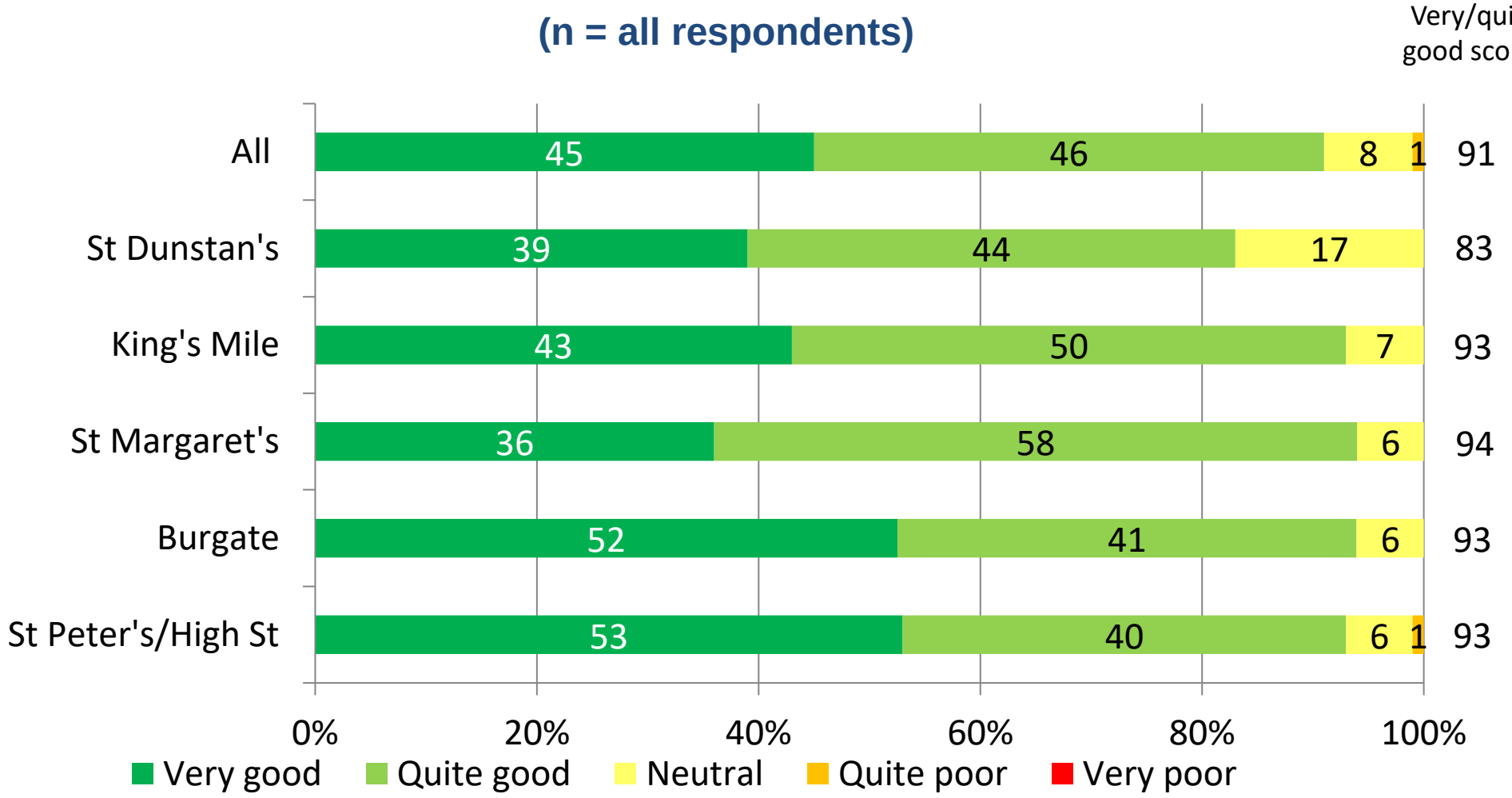
Area ratings: Cleanliness (Spring 21)

How would you rate this specific area for its Cleanliness?

(n = all respondents)



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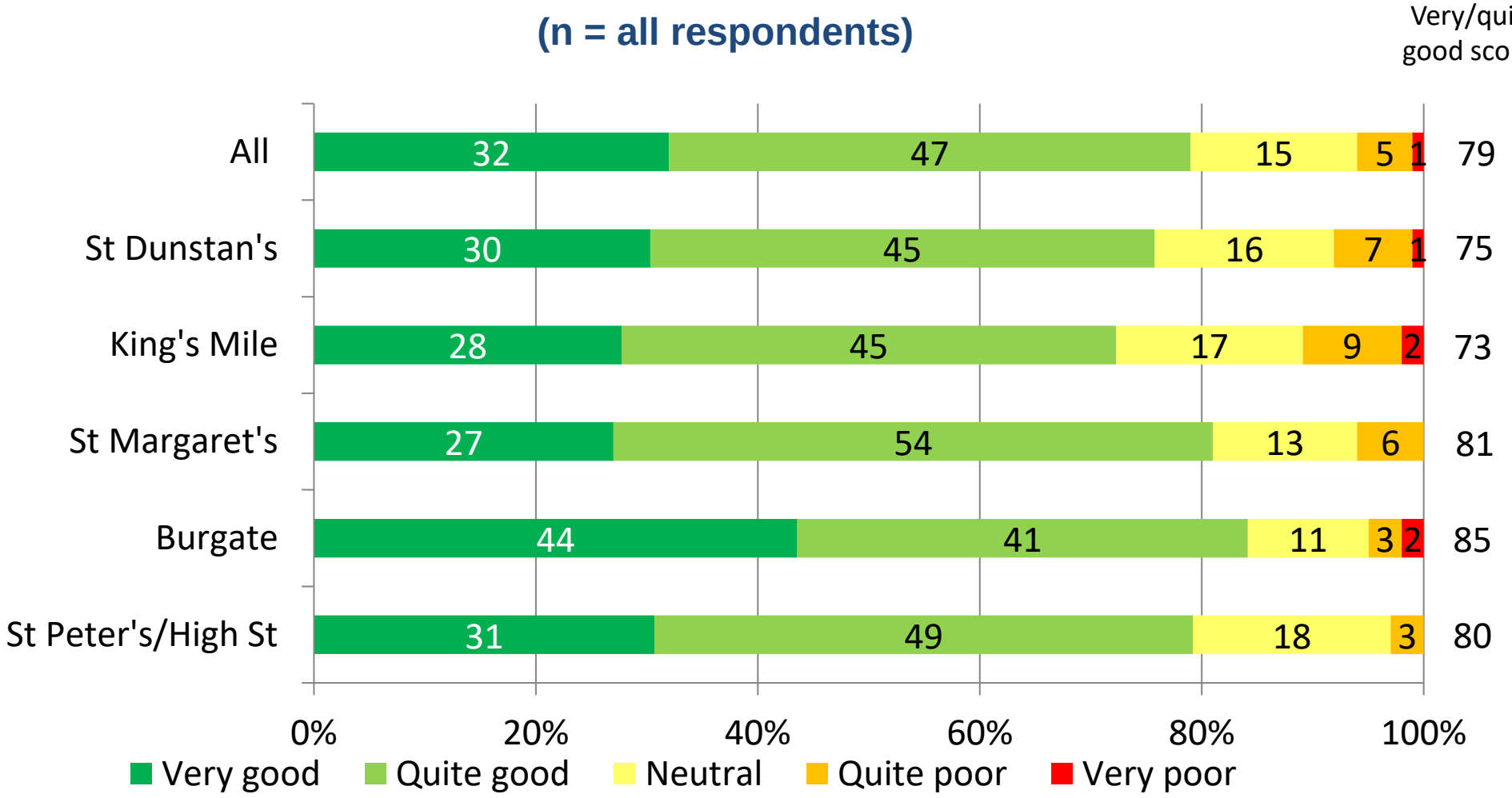

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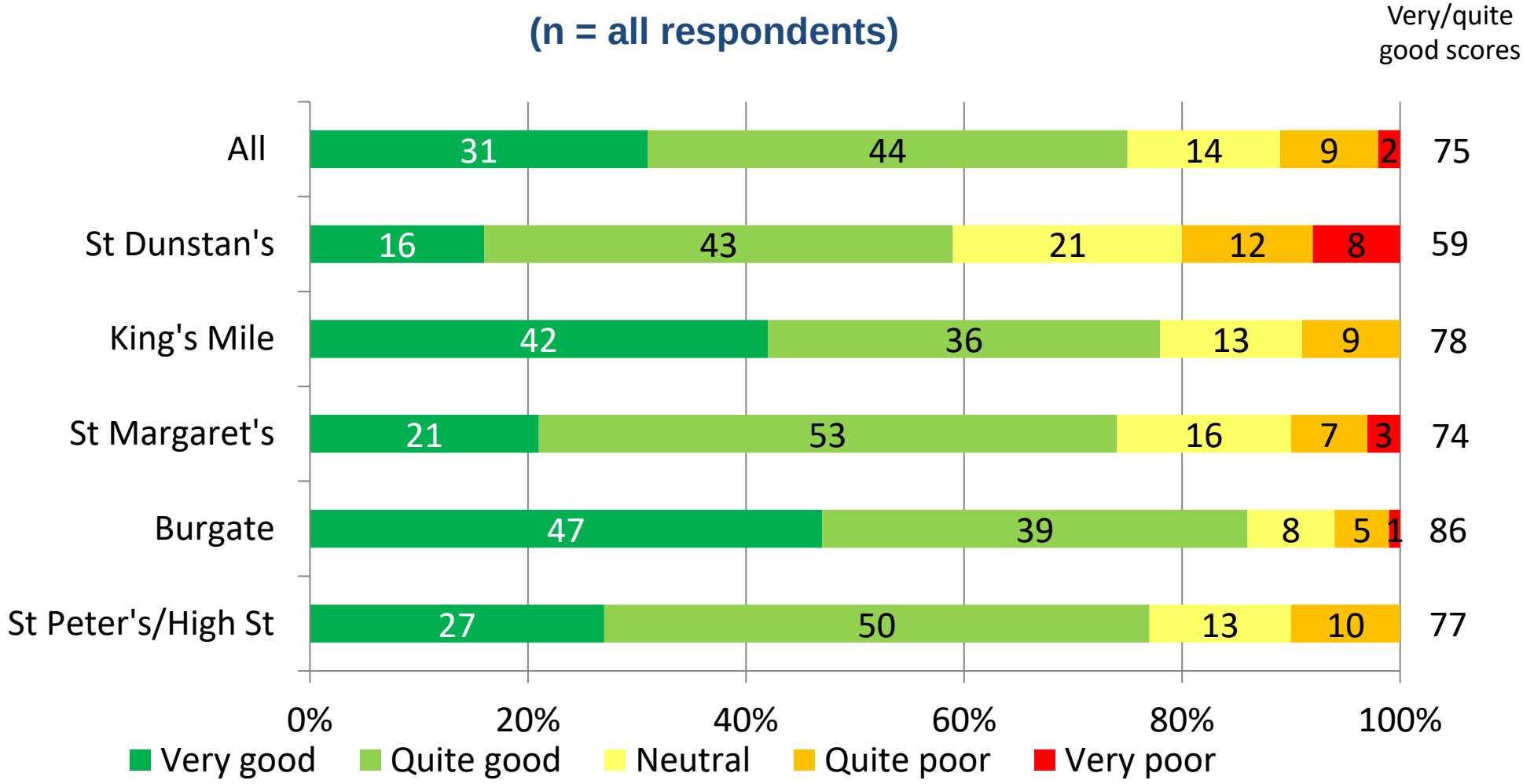

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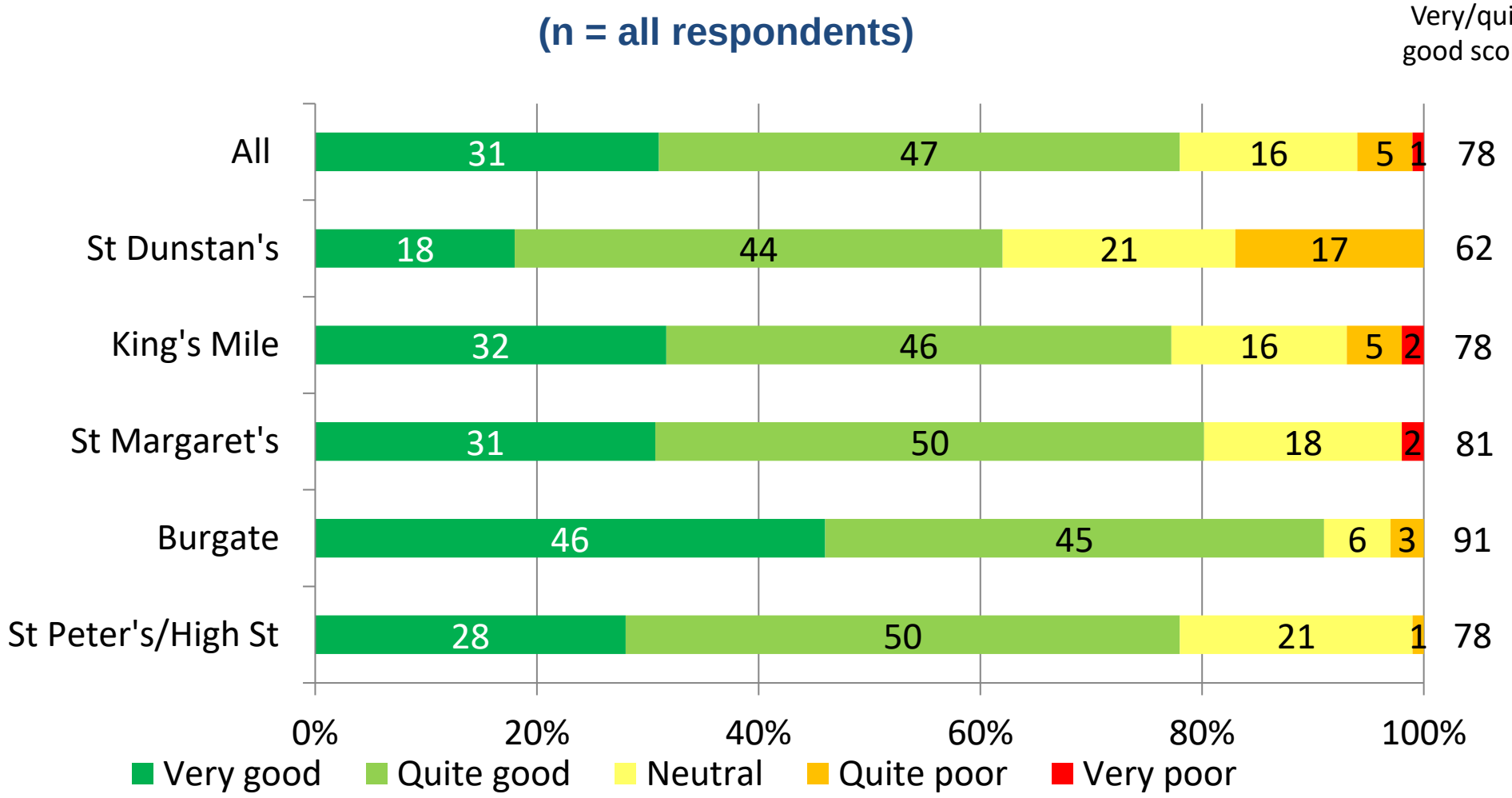

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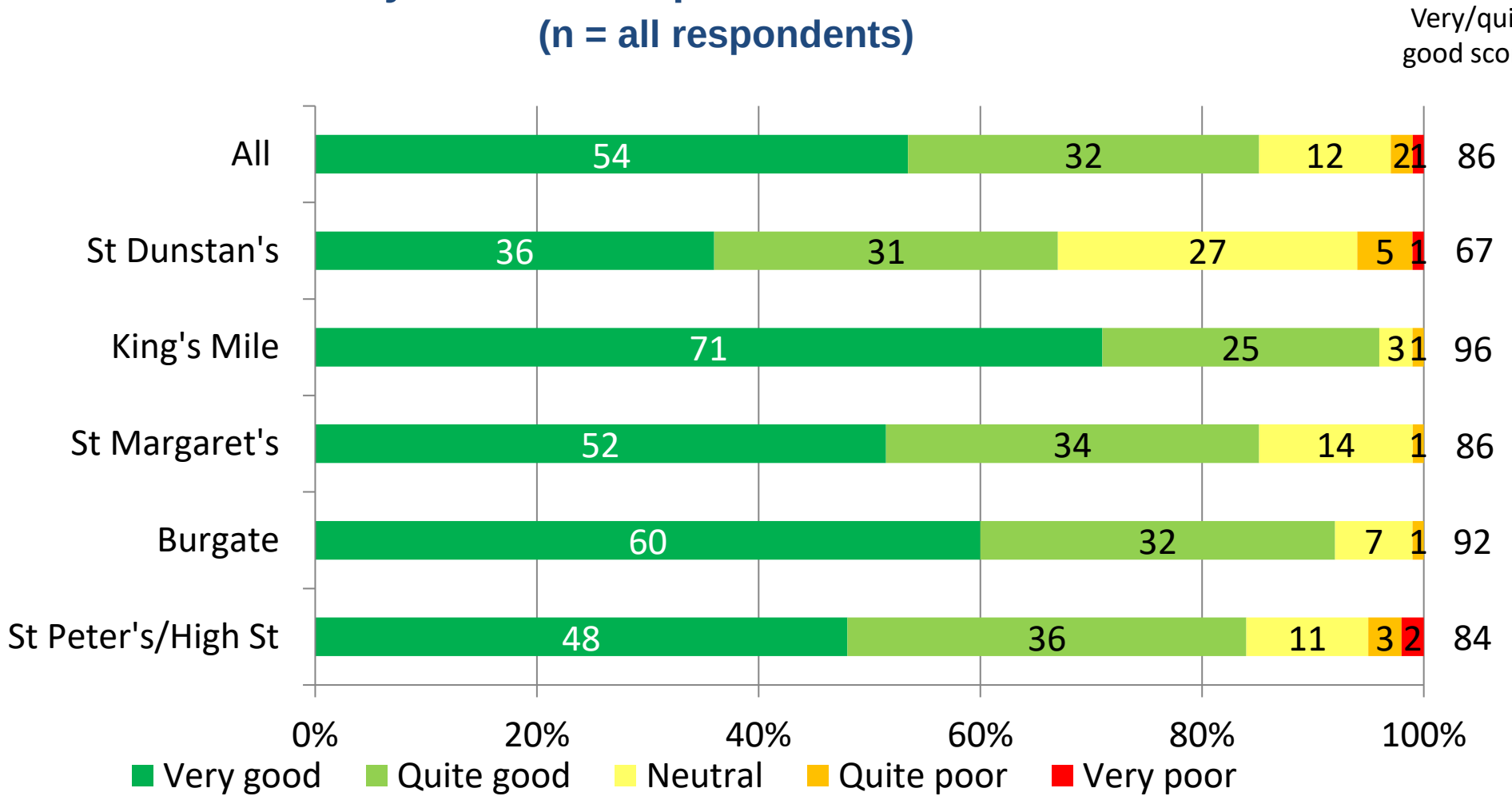

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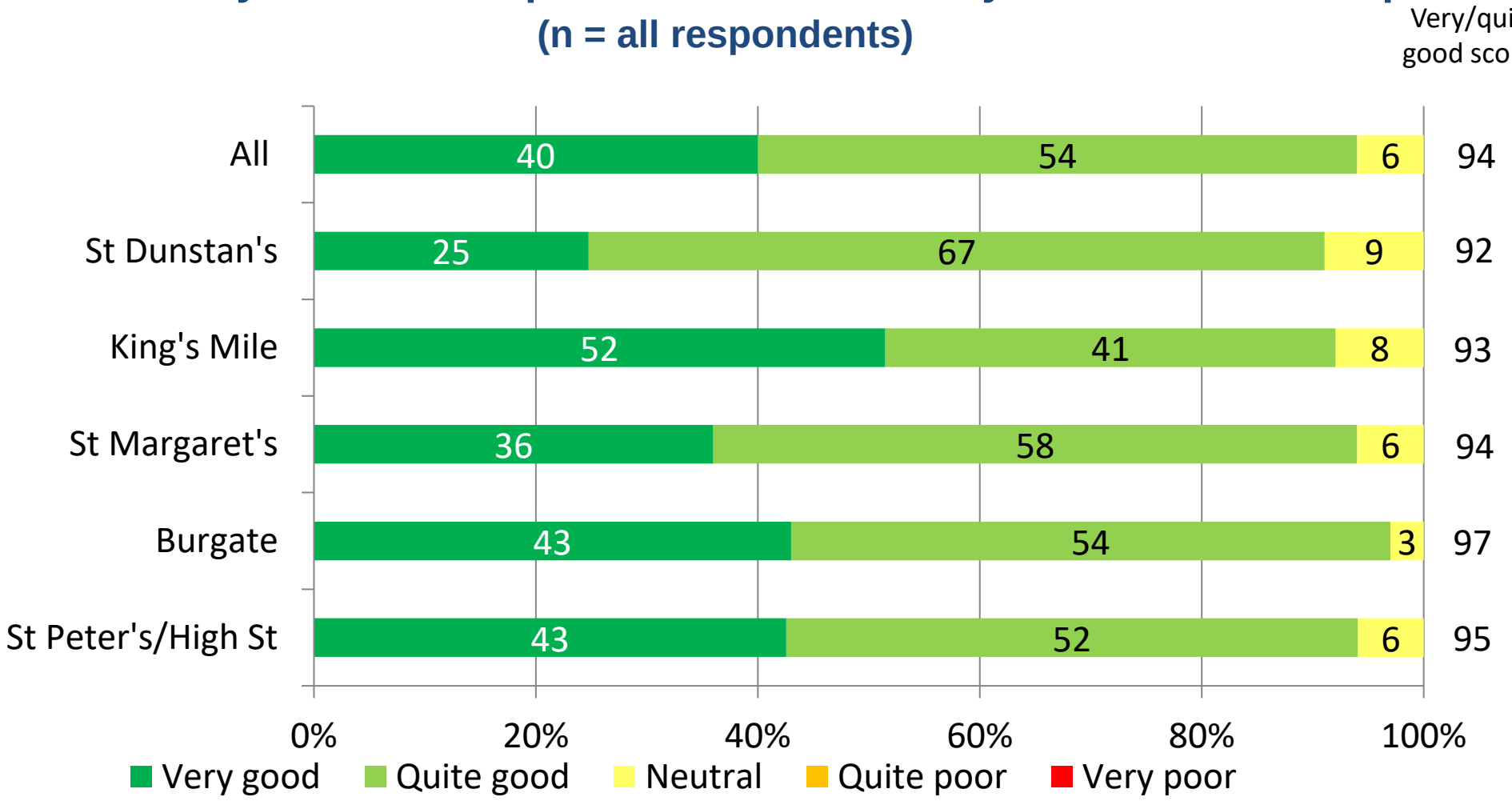
Area ratings: Service in the shops (Spring 21)

How would you rate this specific area for Friendly Service in the shops?

(n = all respondents)



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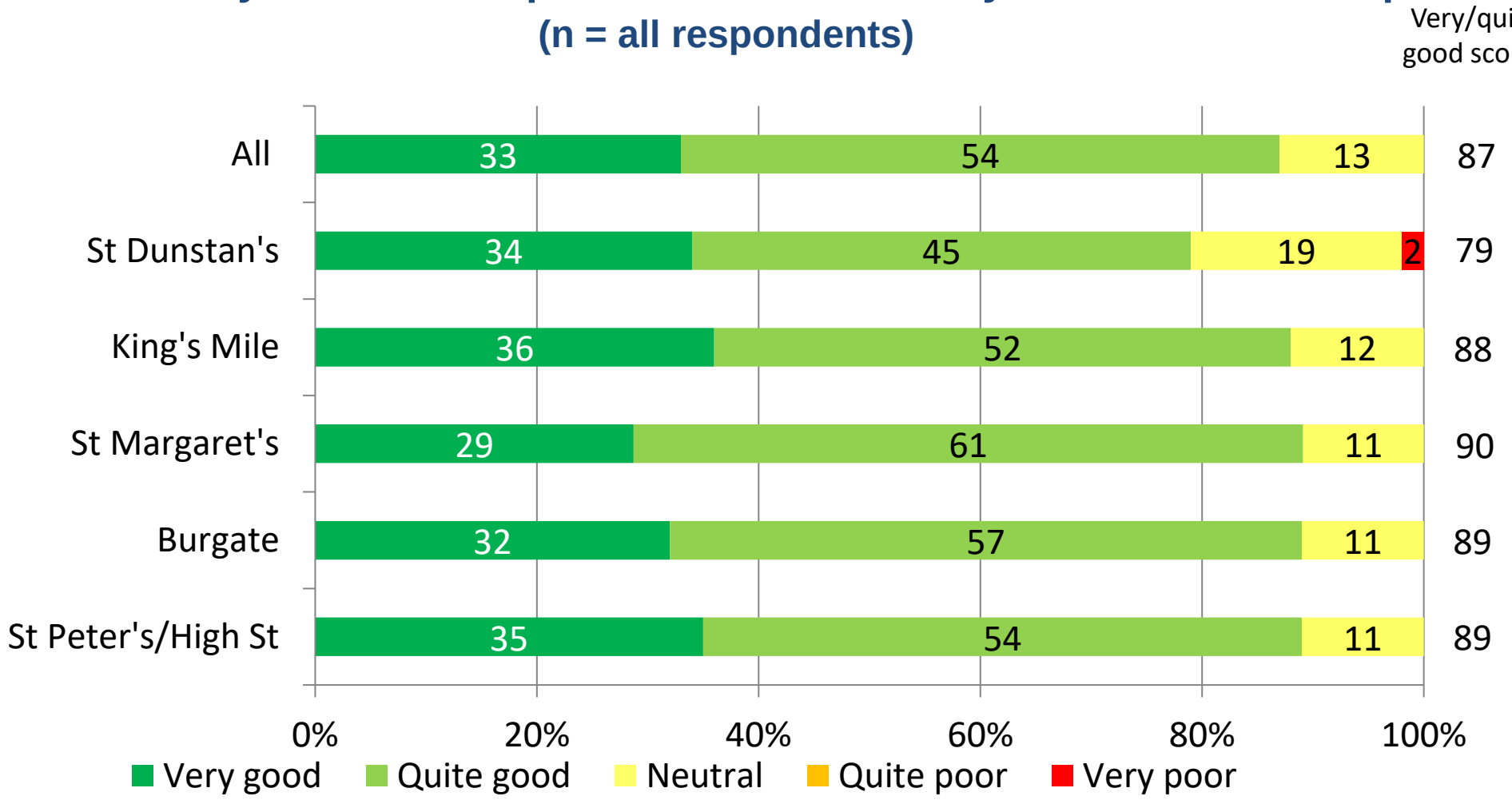

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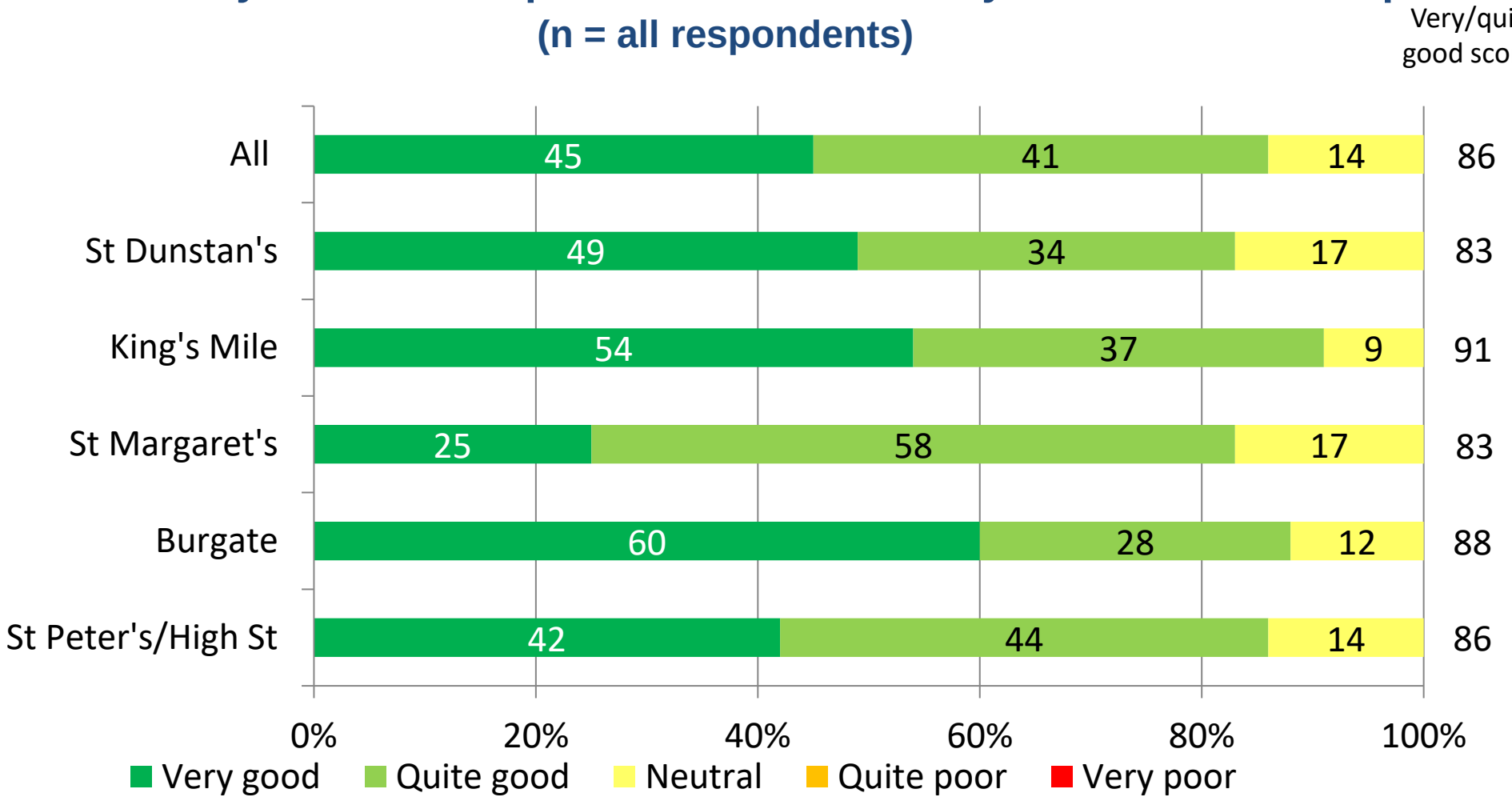

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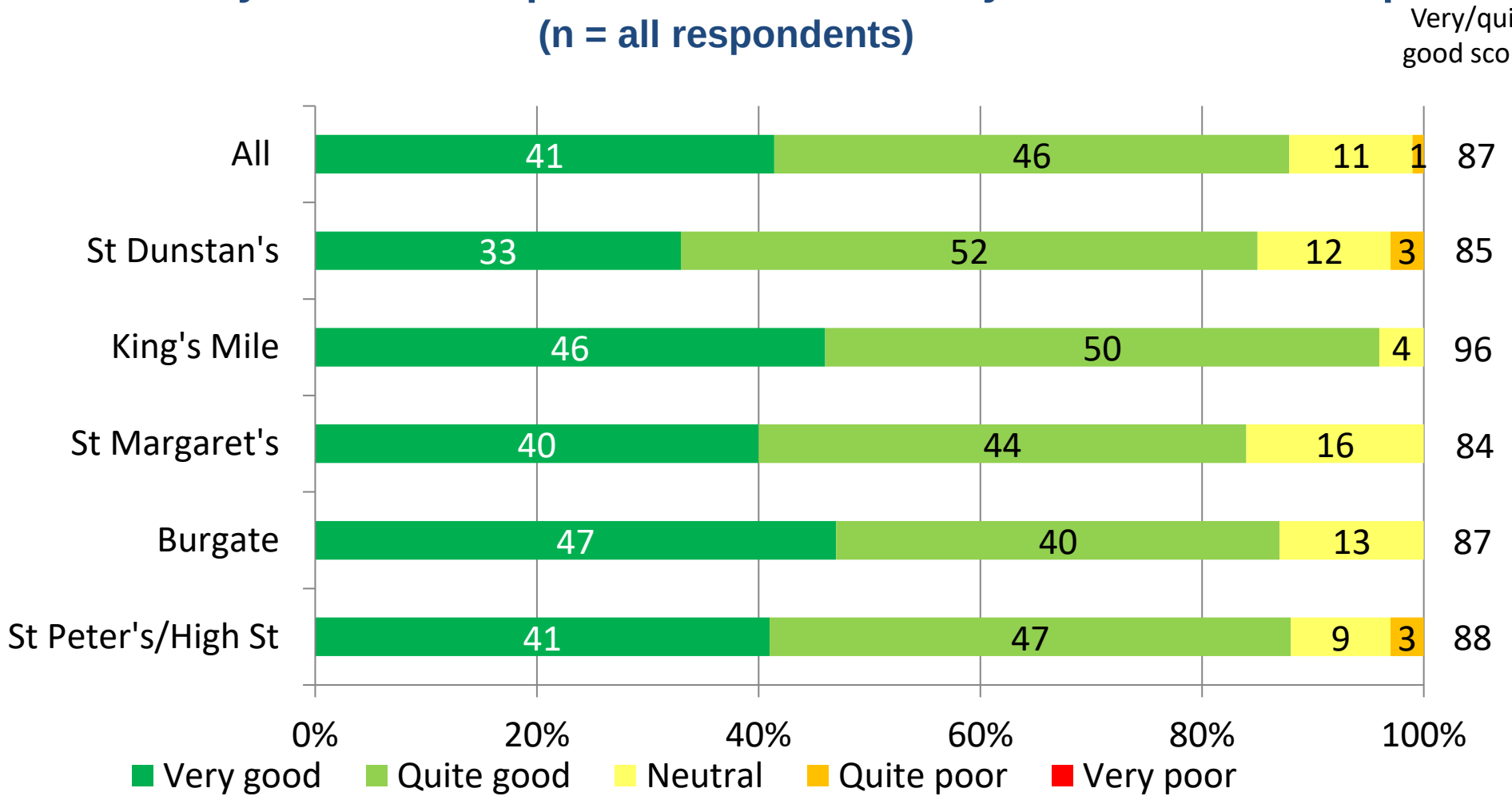

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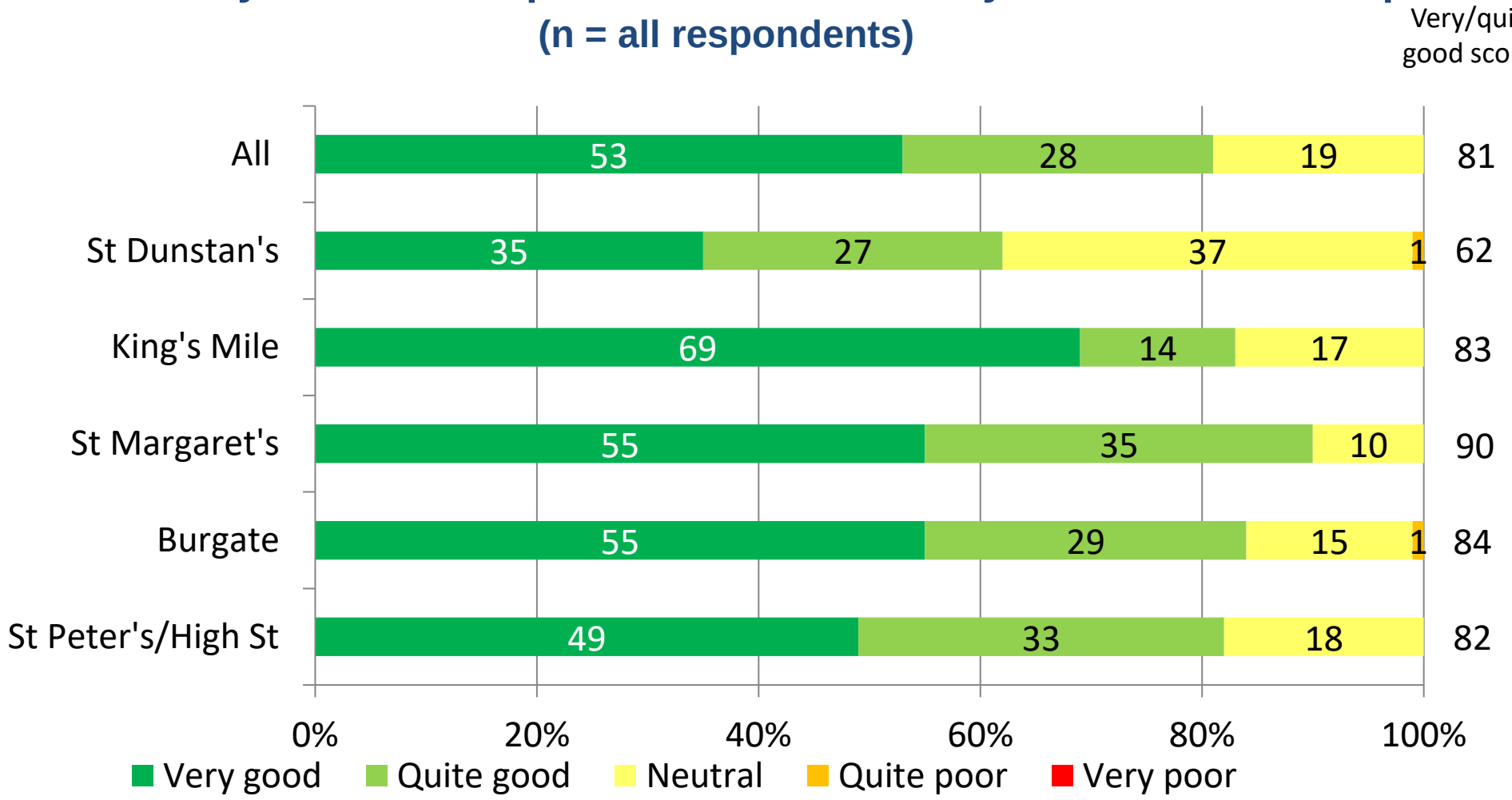

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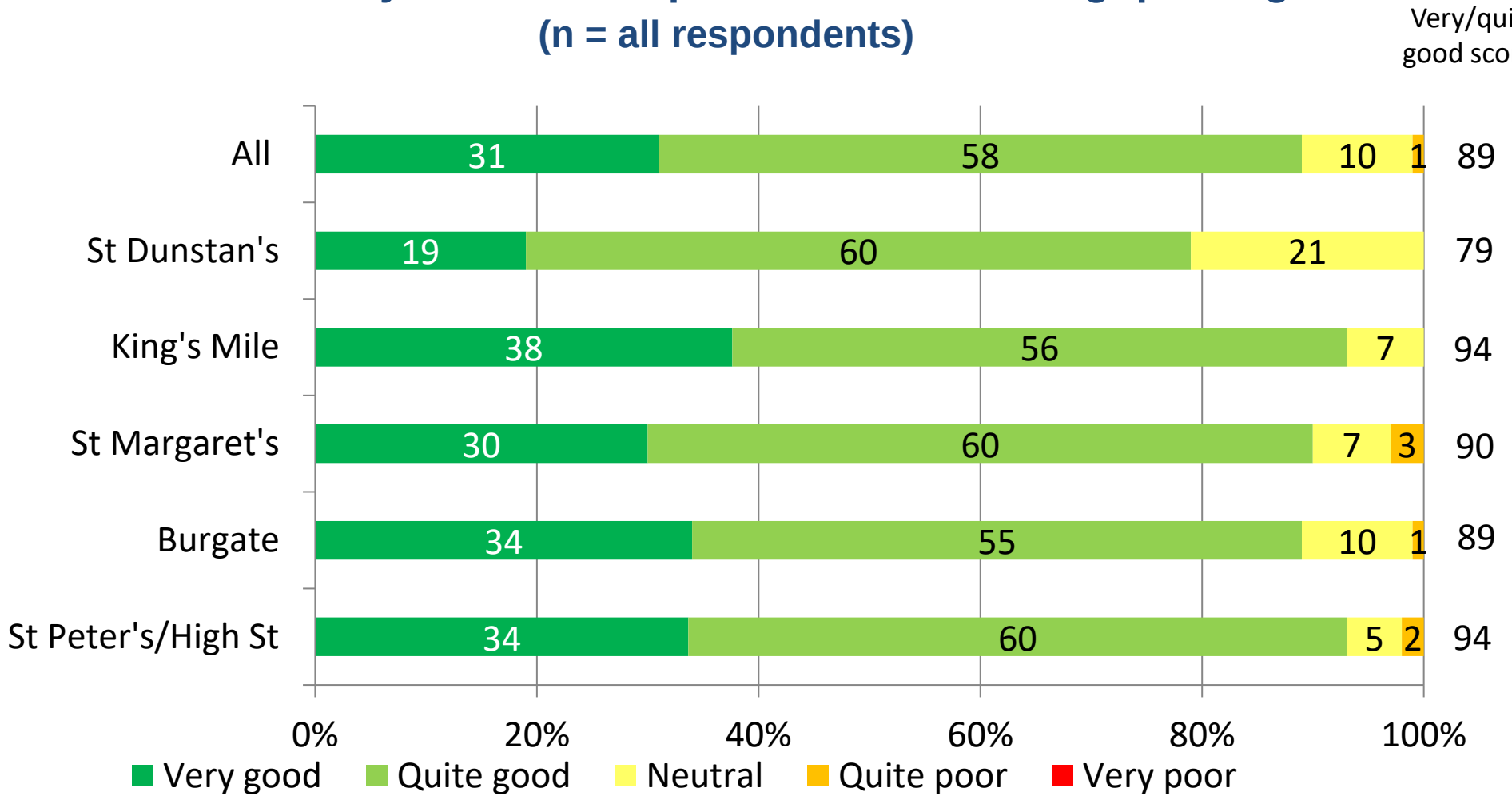
Area ratings: Signposting (Spring 21)

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



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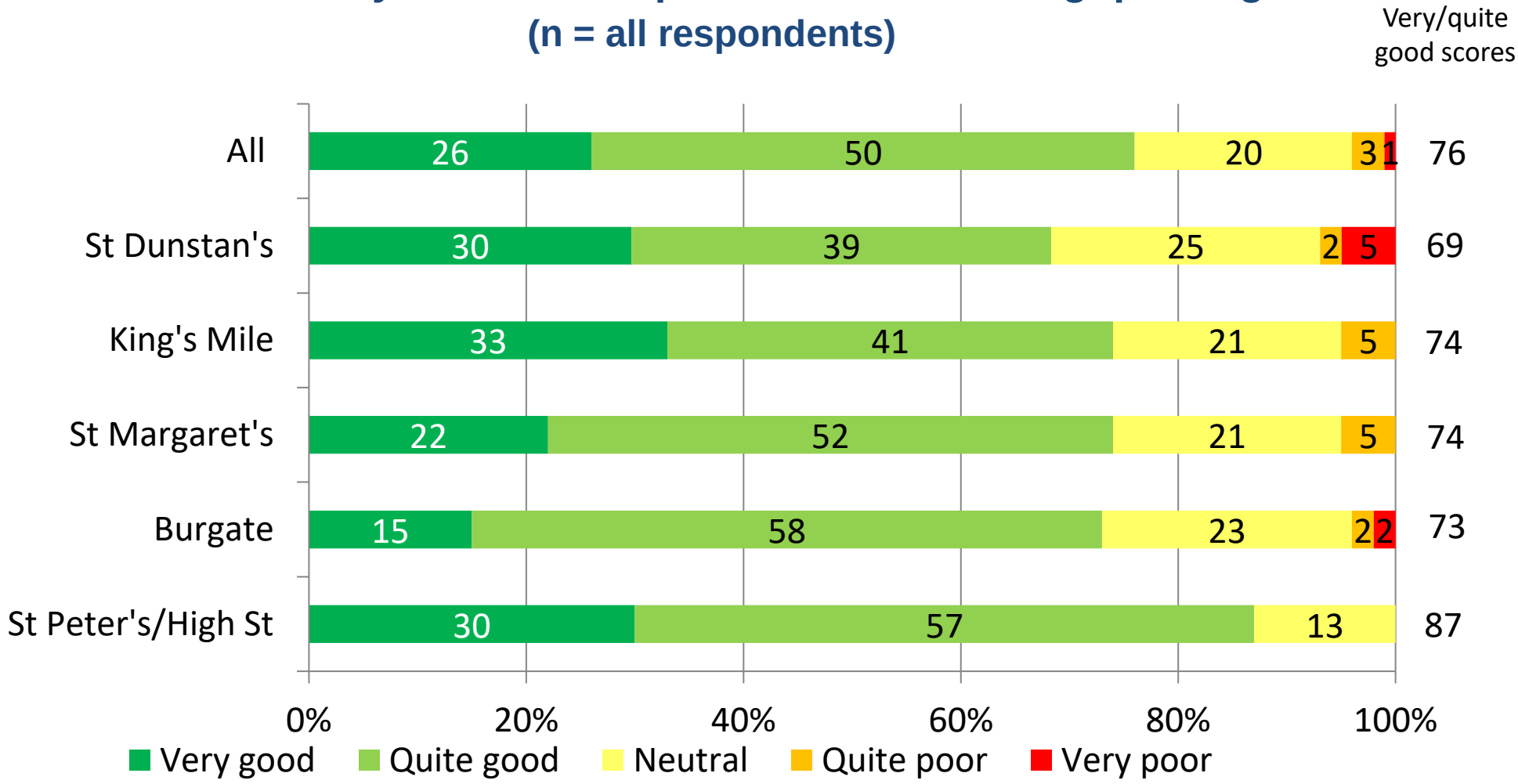

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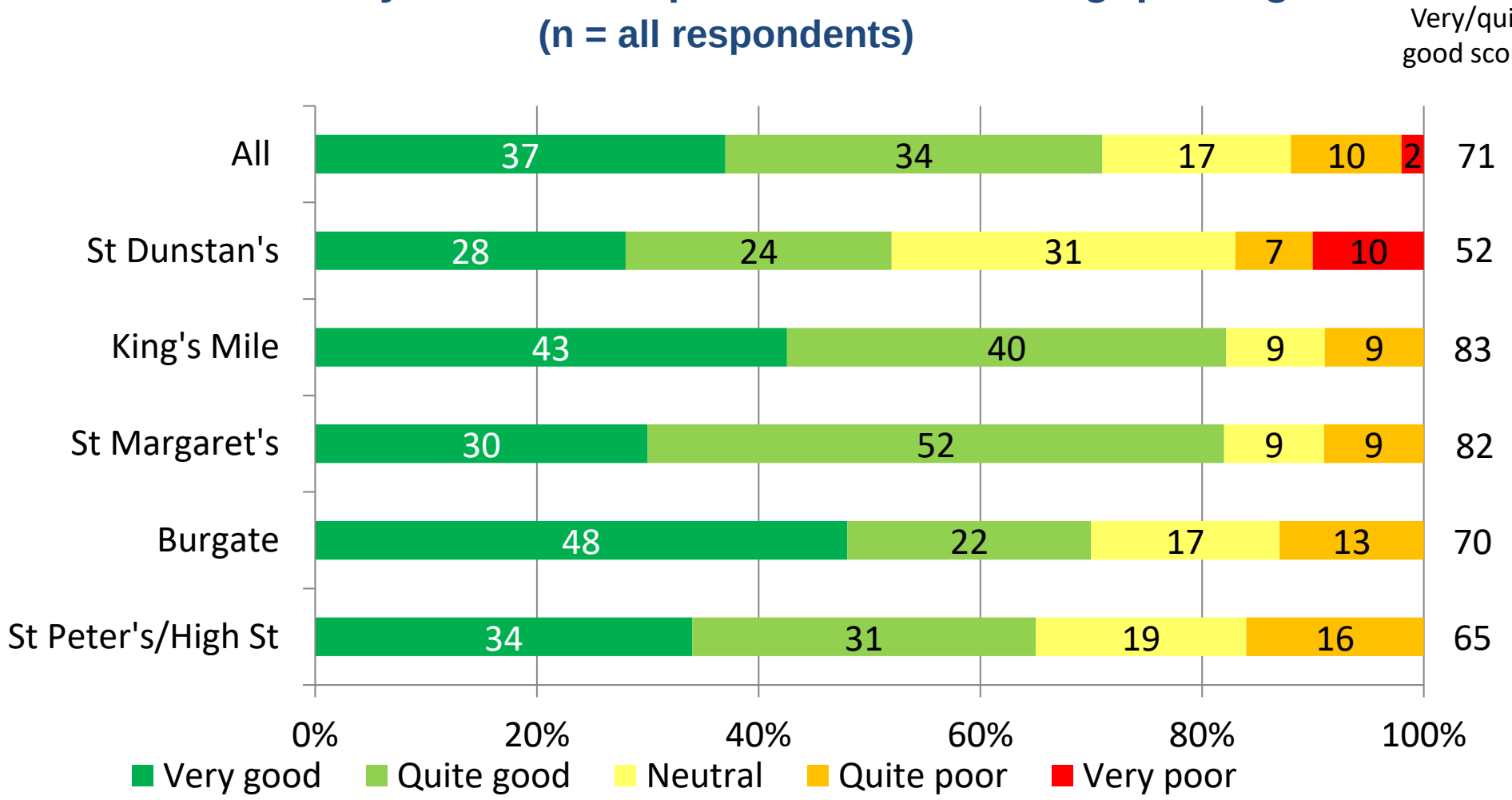

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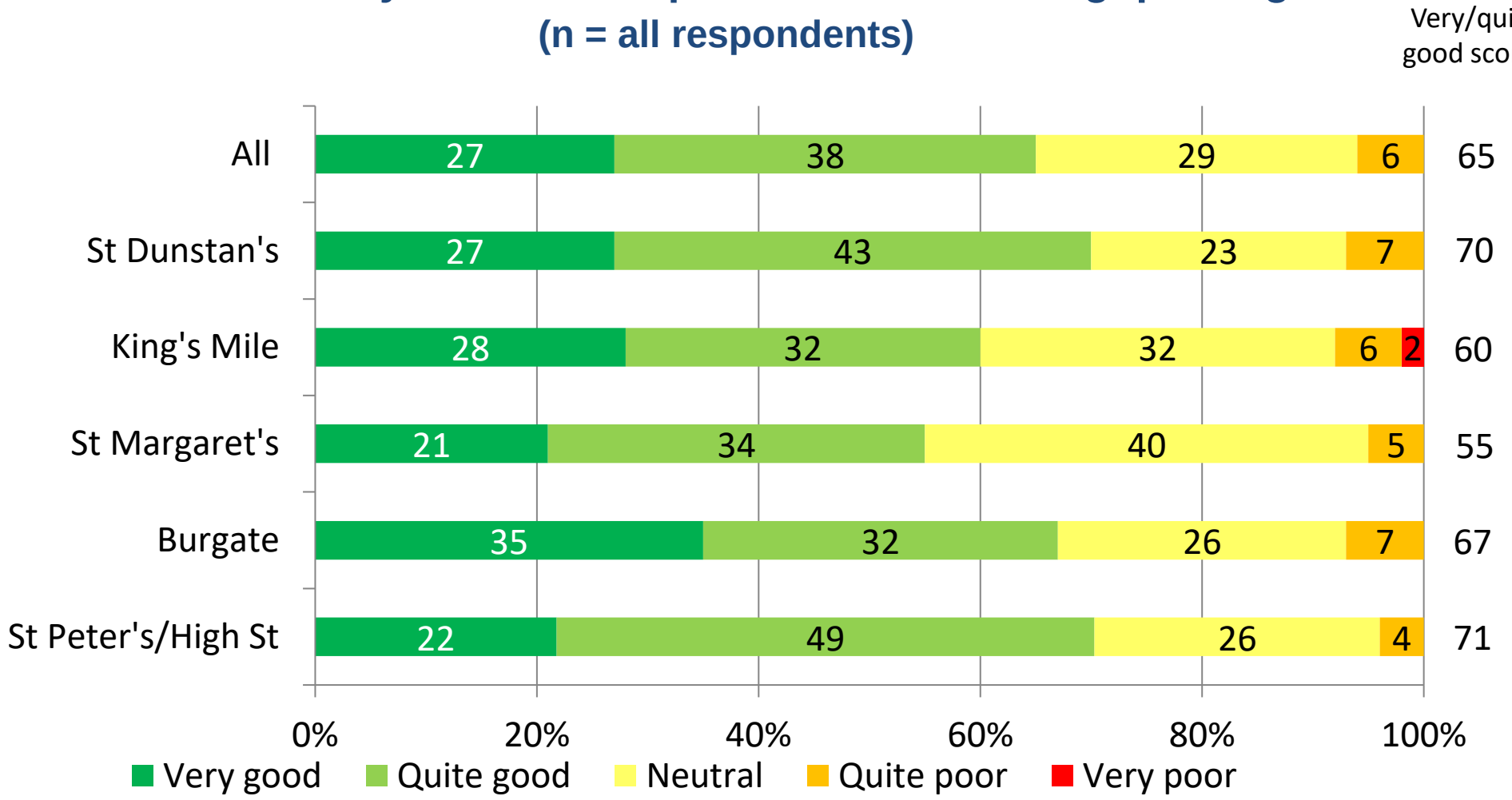

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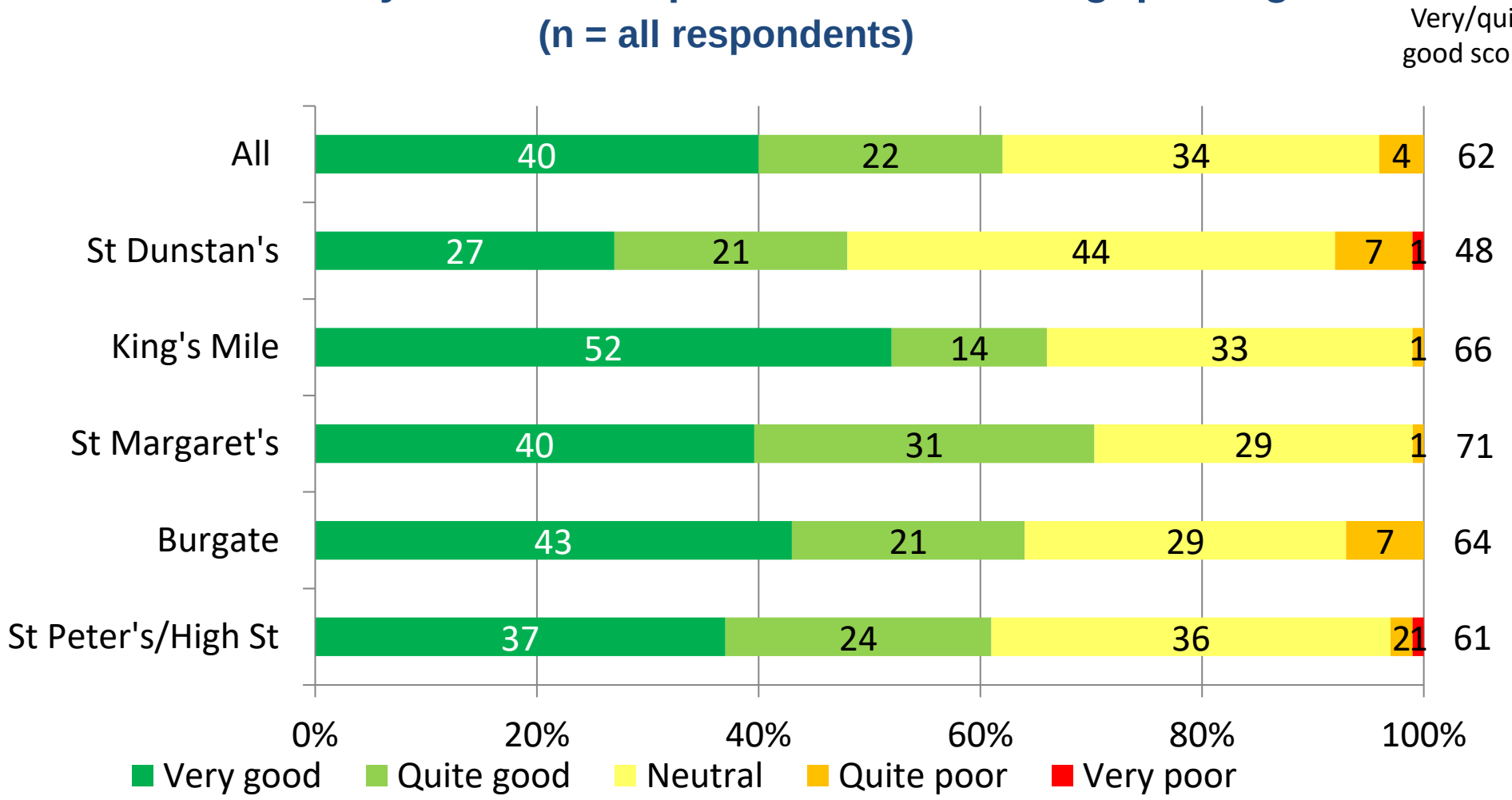

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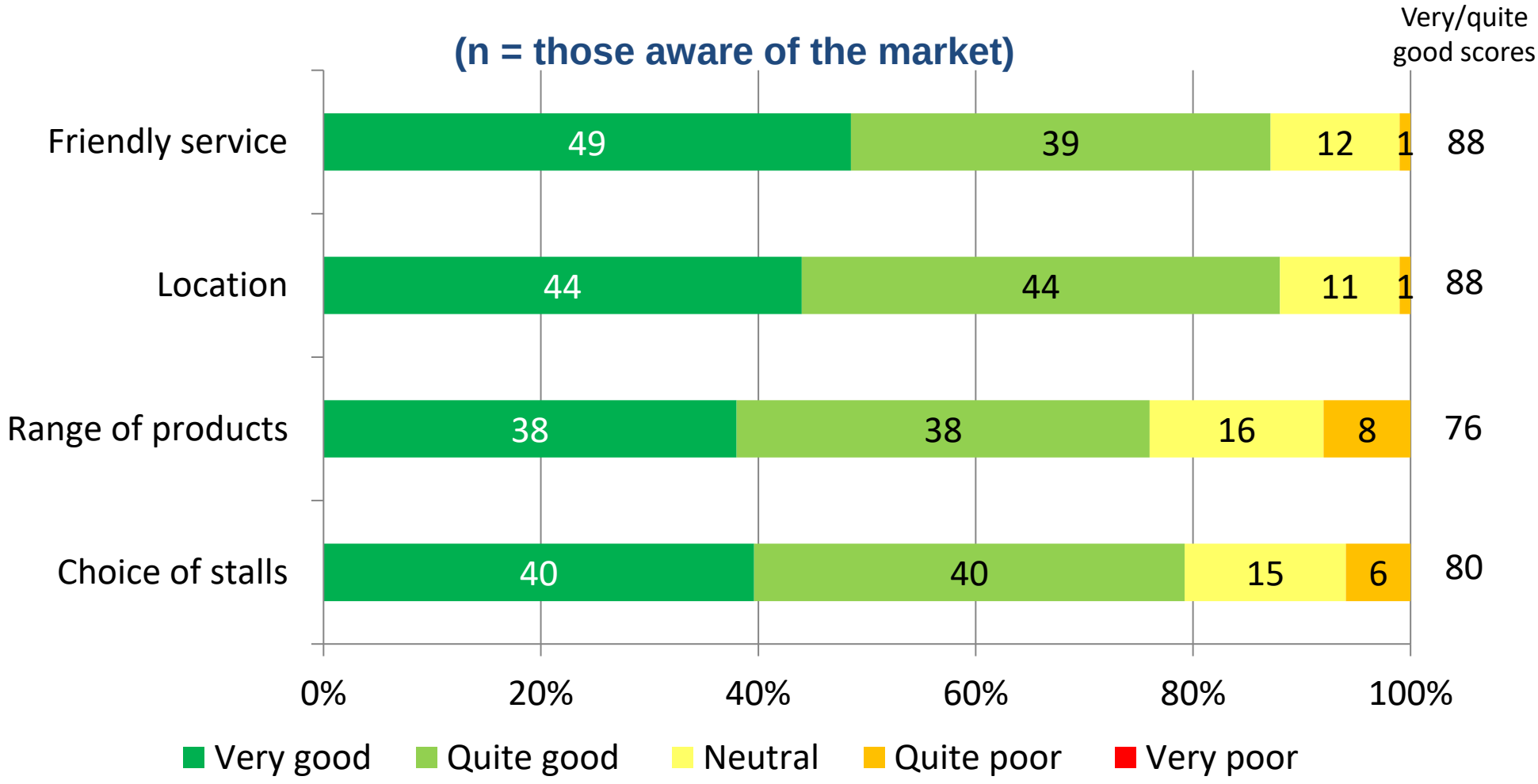
Market Ratings (Spring 21)

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



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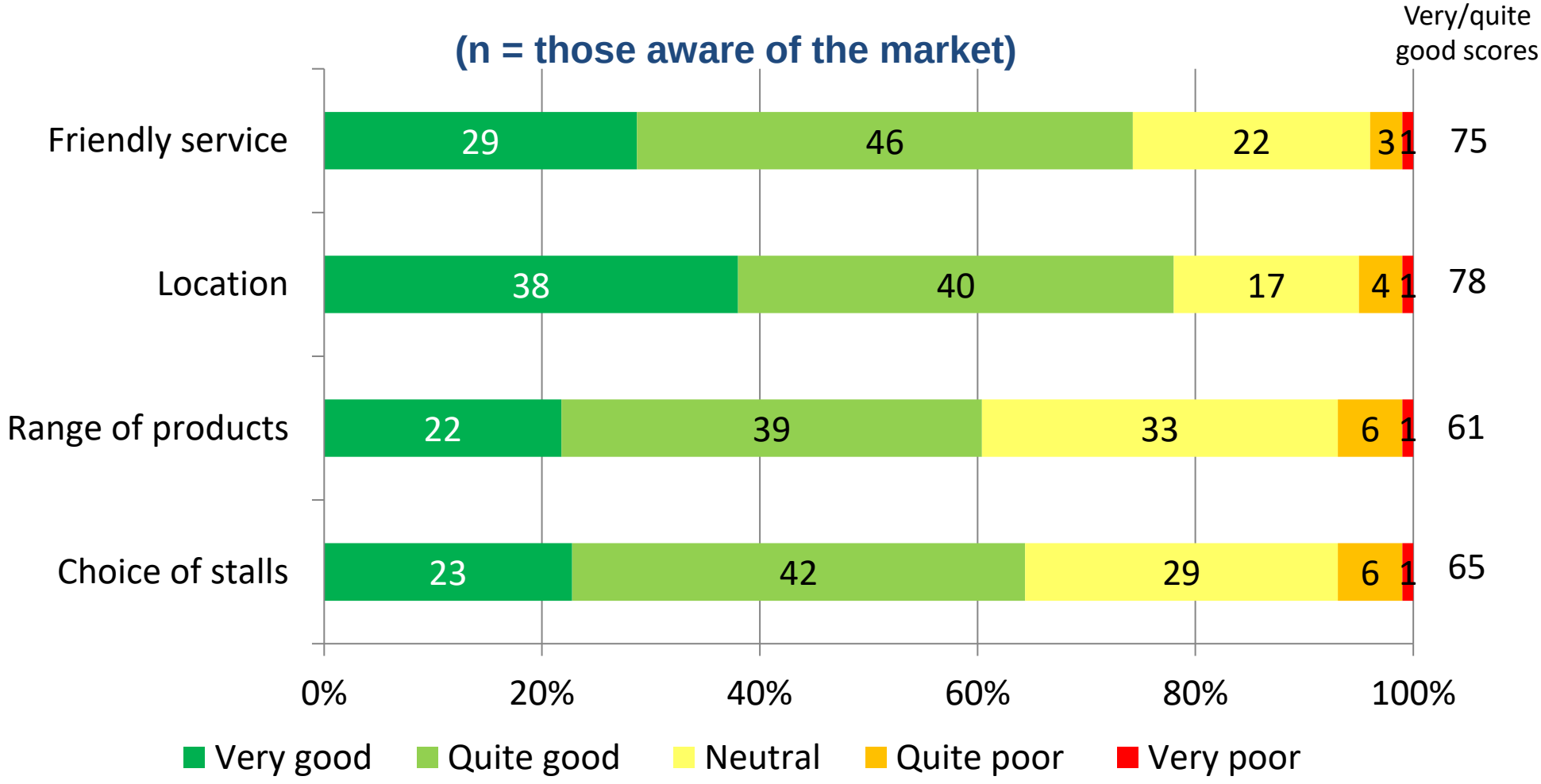

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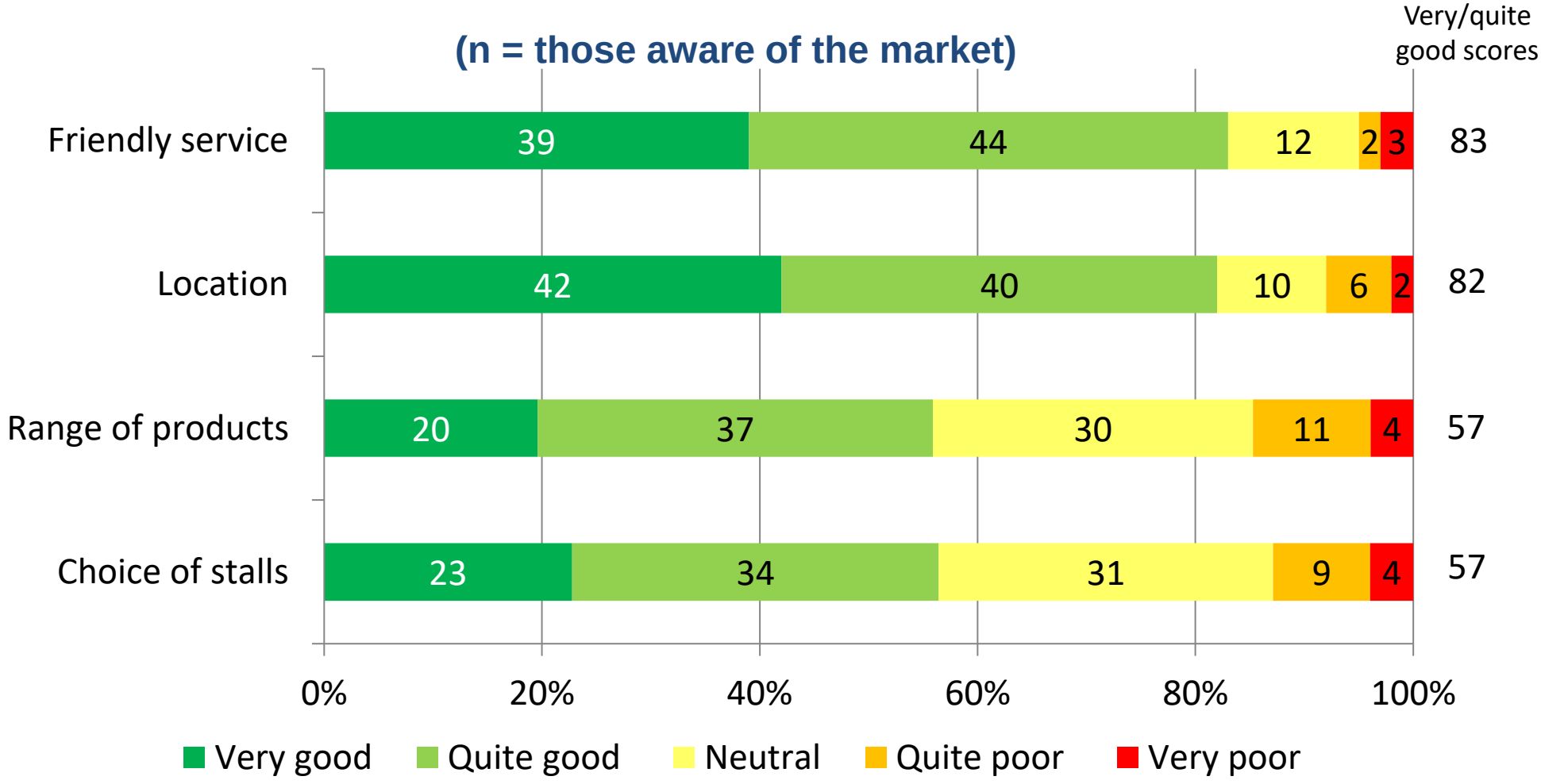

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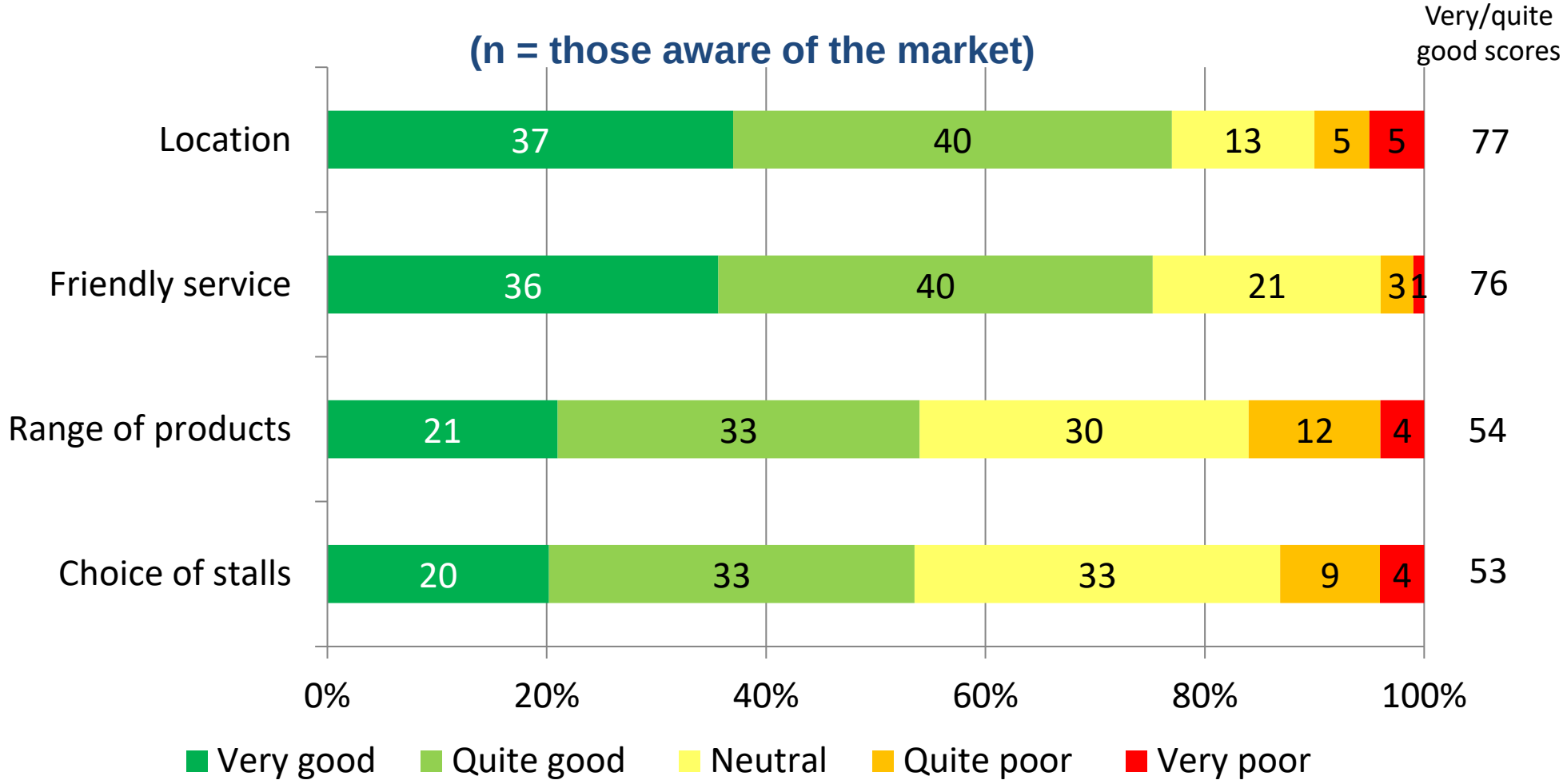

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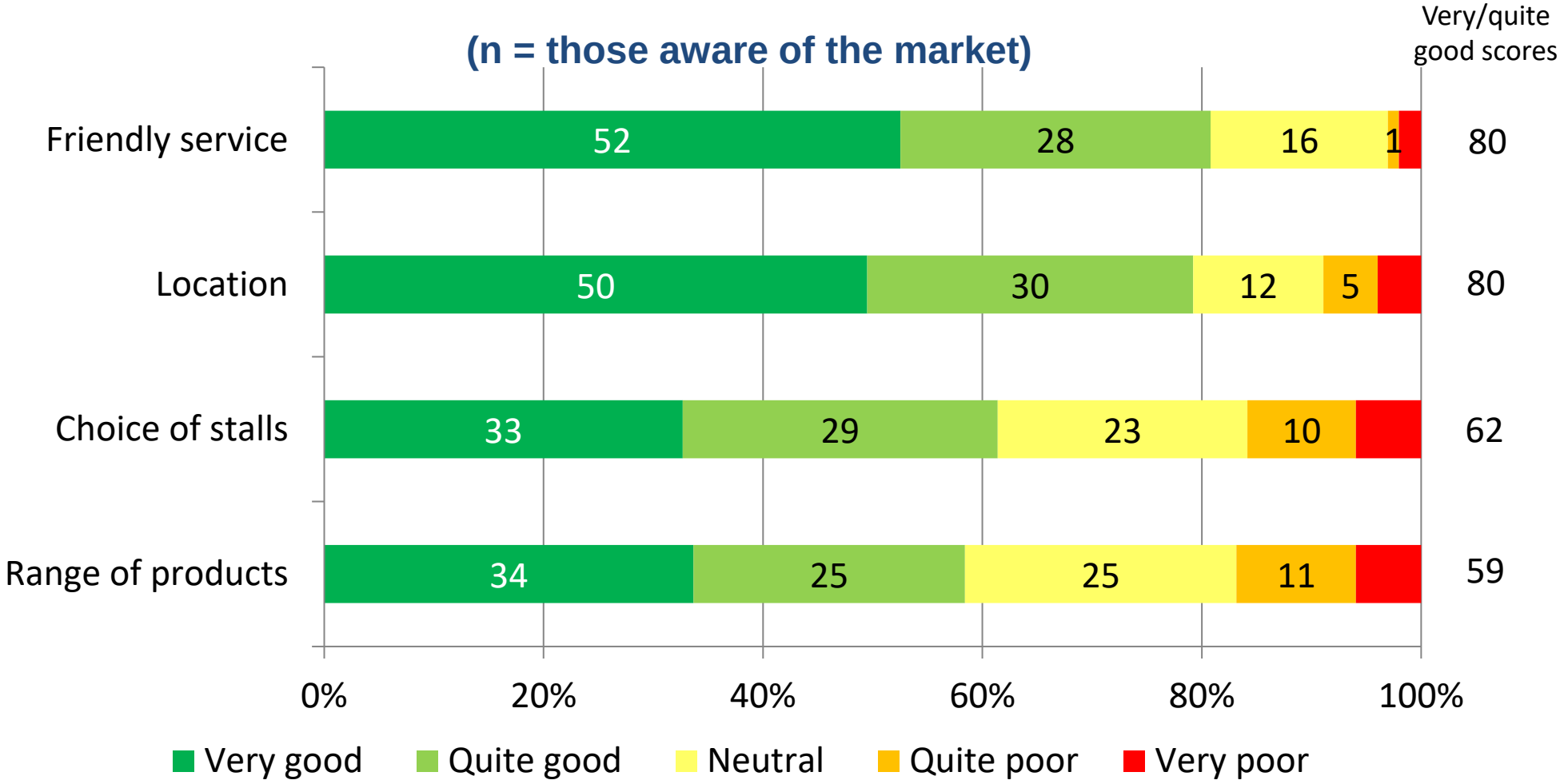

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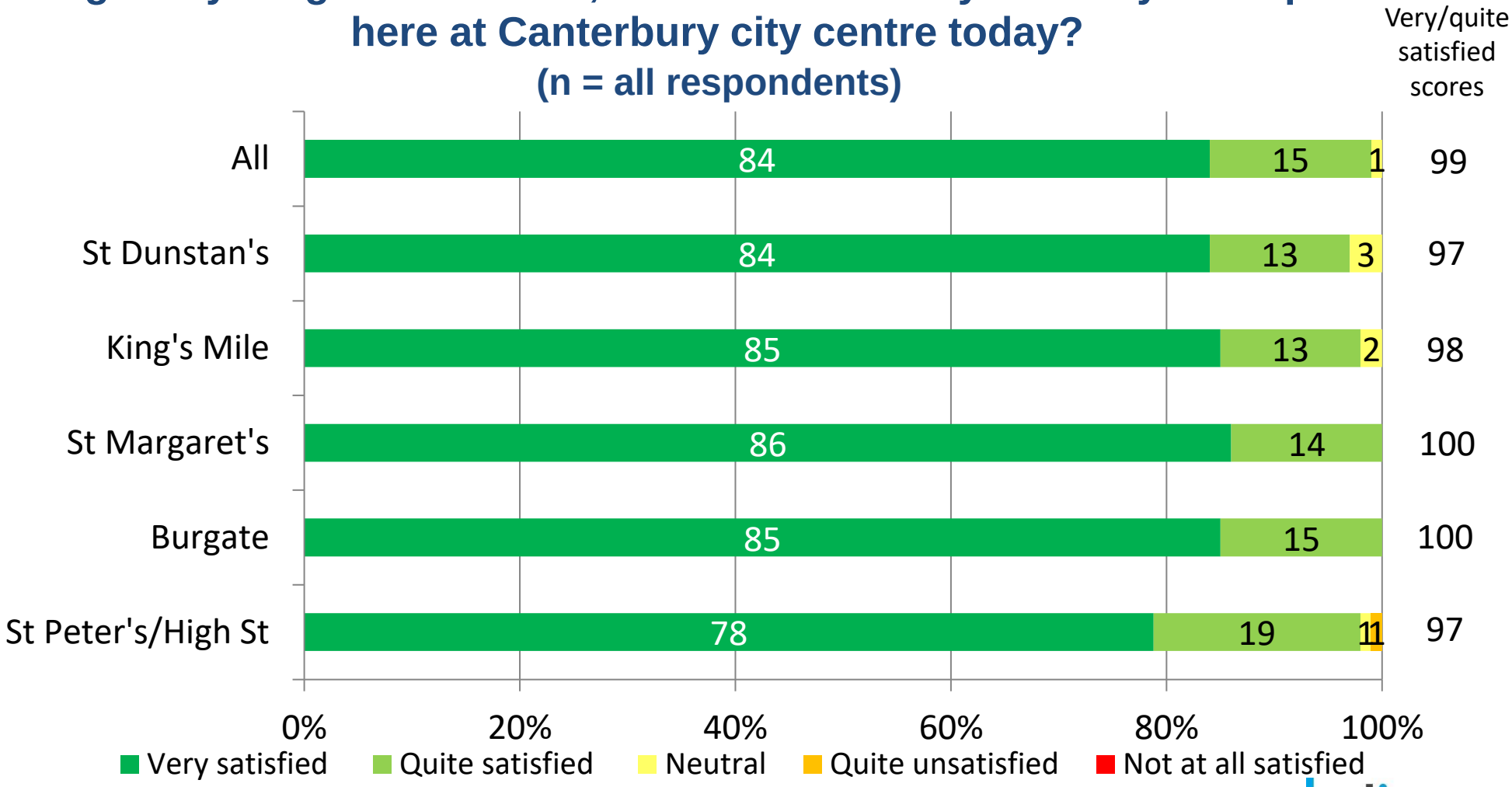
Overall satisfaction (Spring 21)

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

(n = all respondents)



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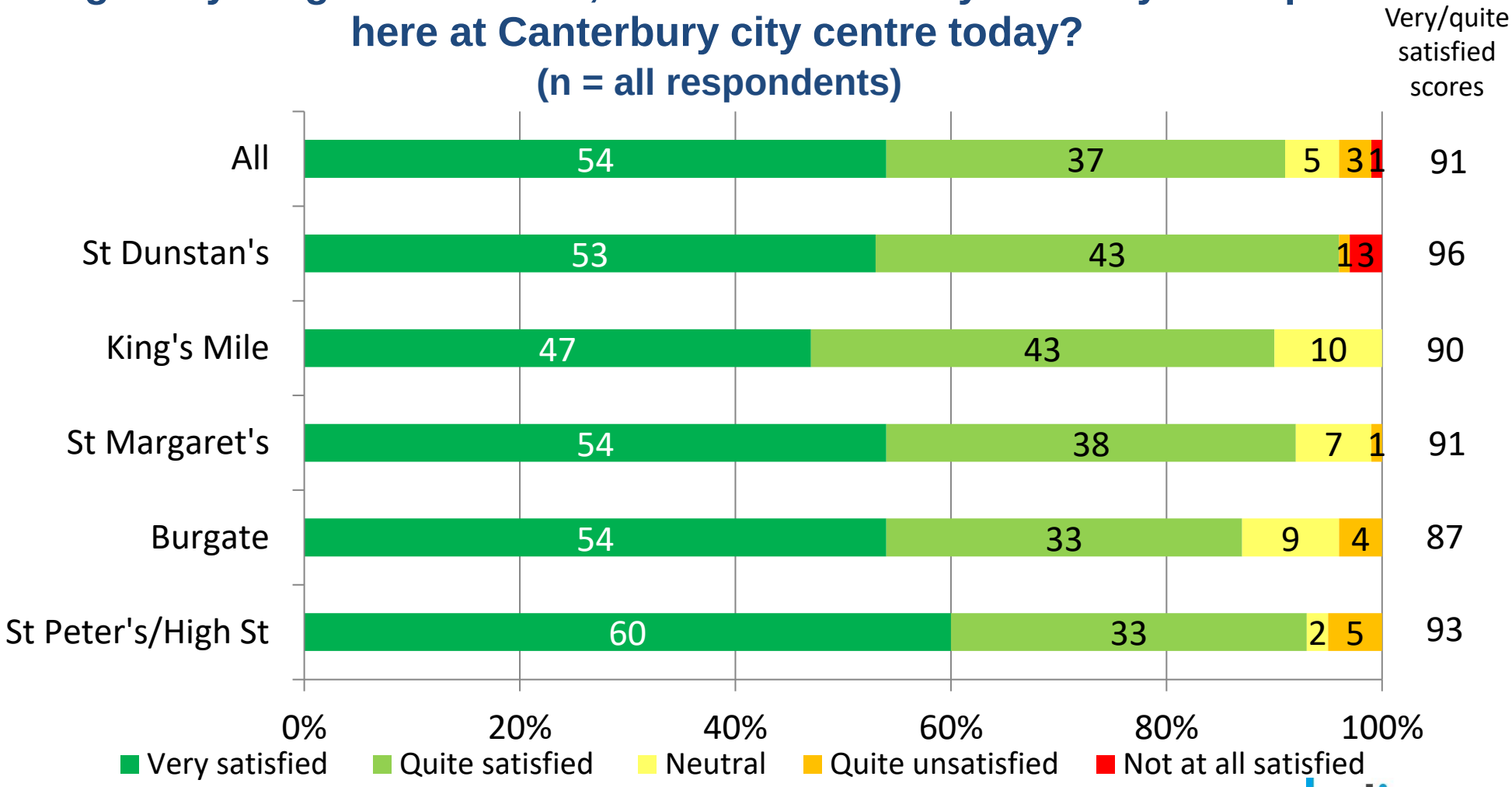

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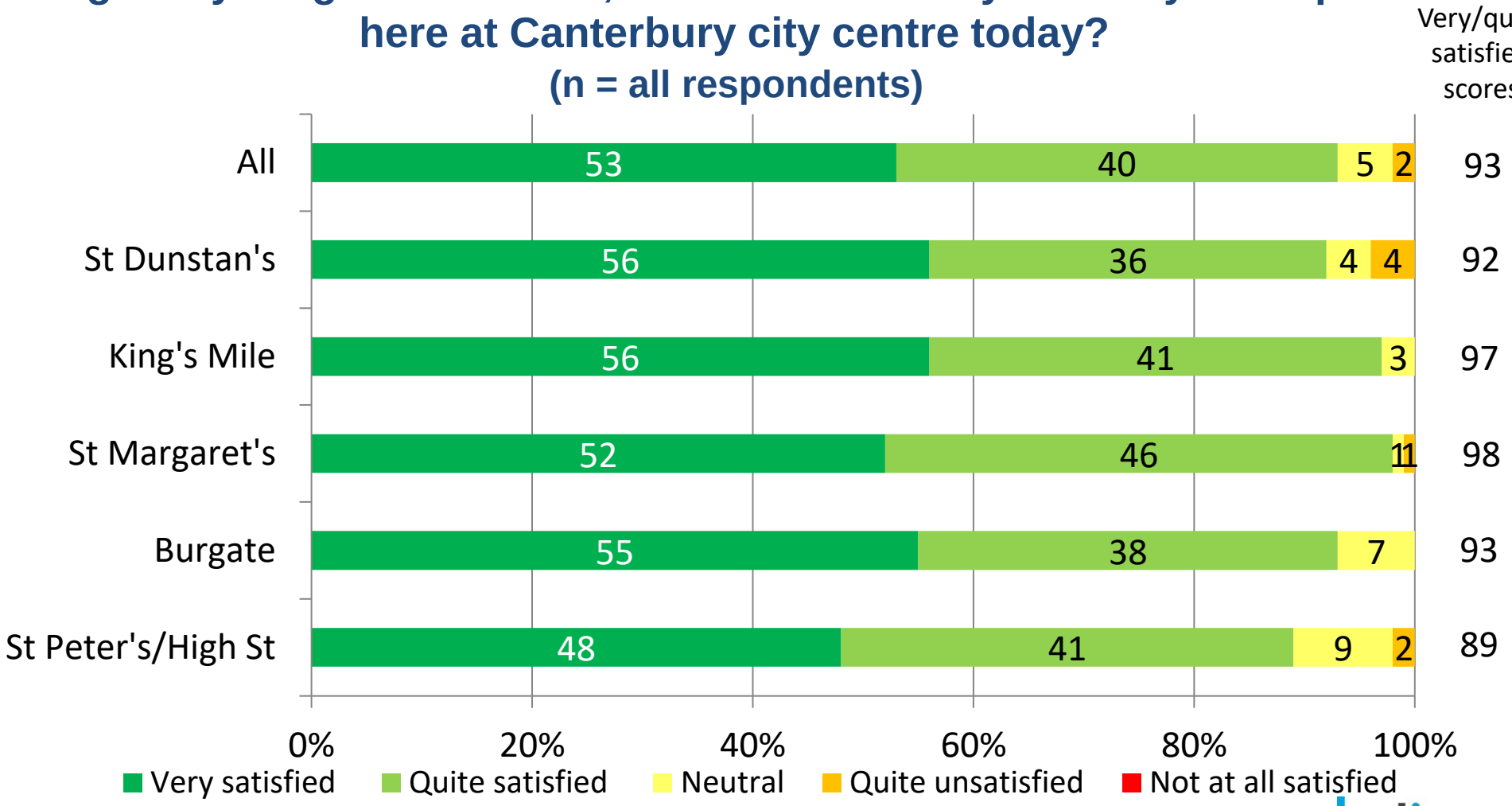

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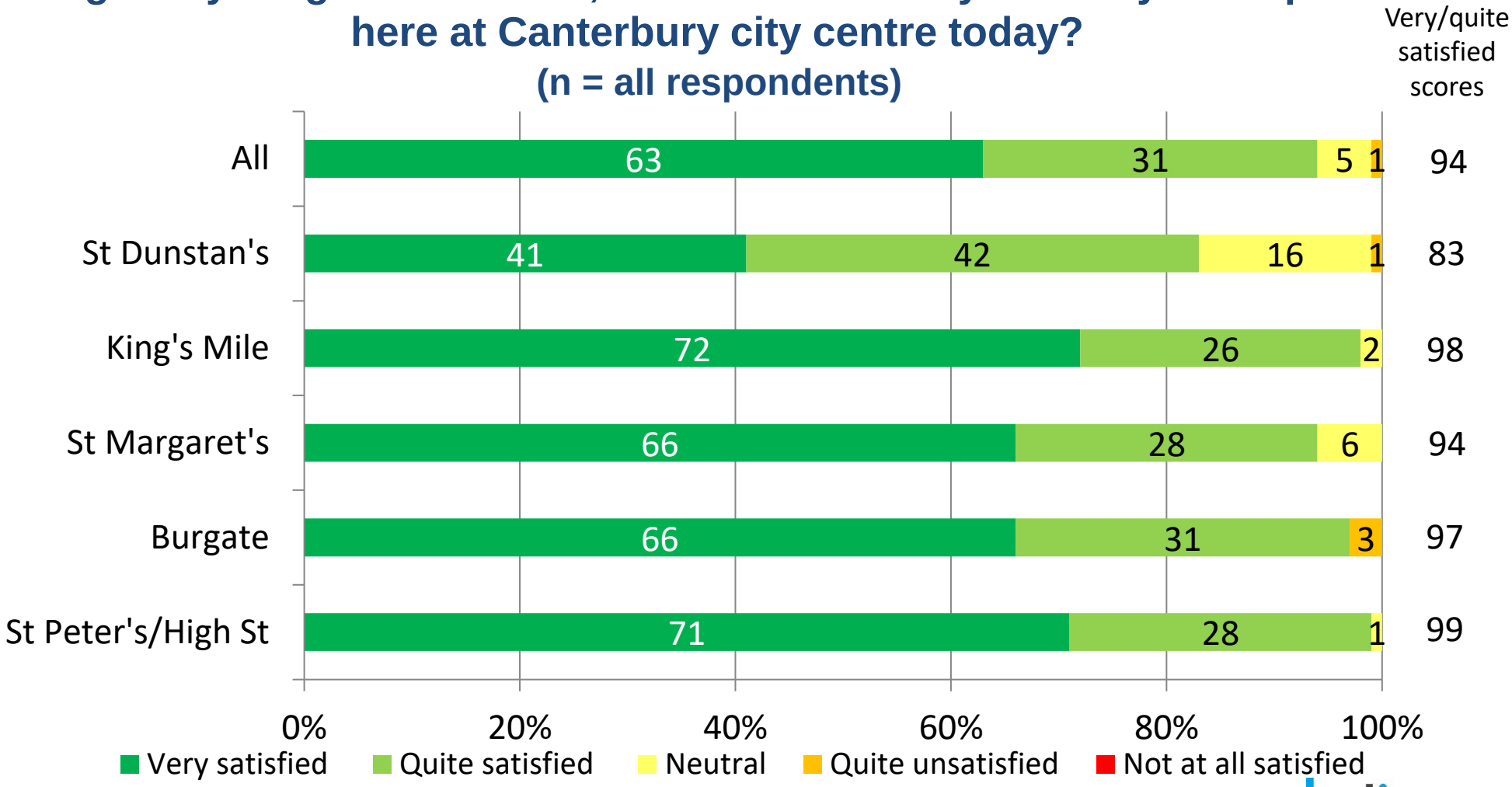

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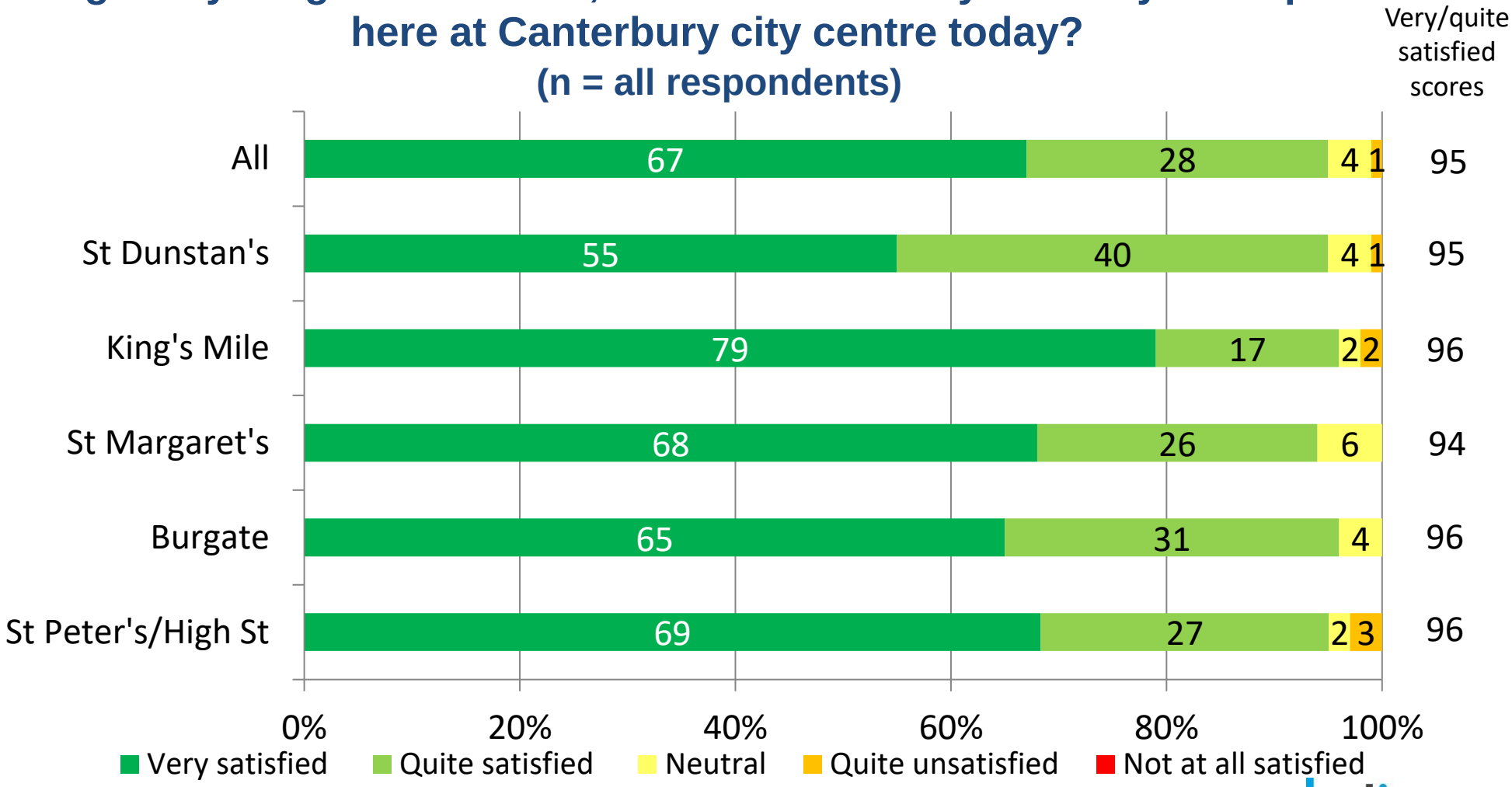

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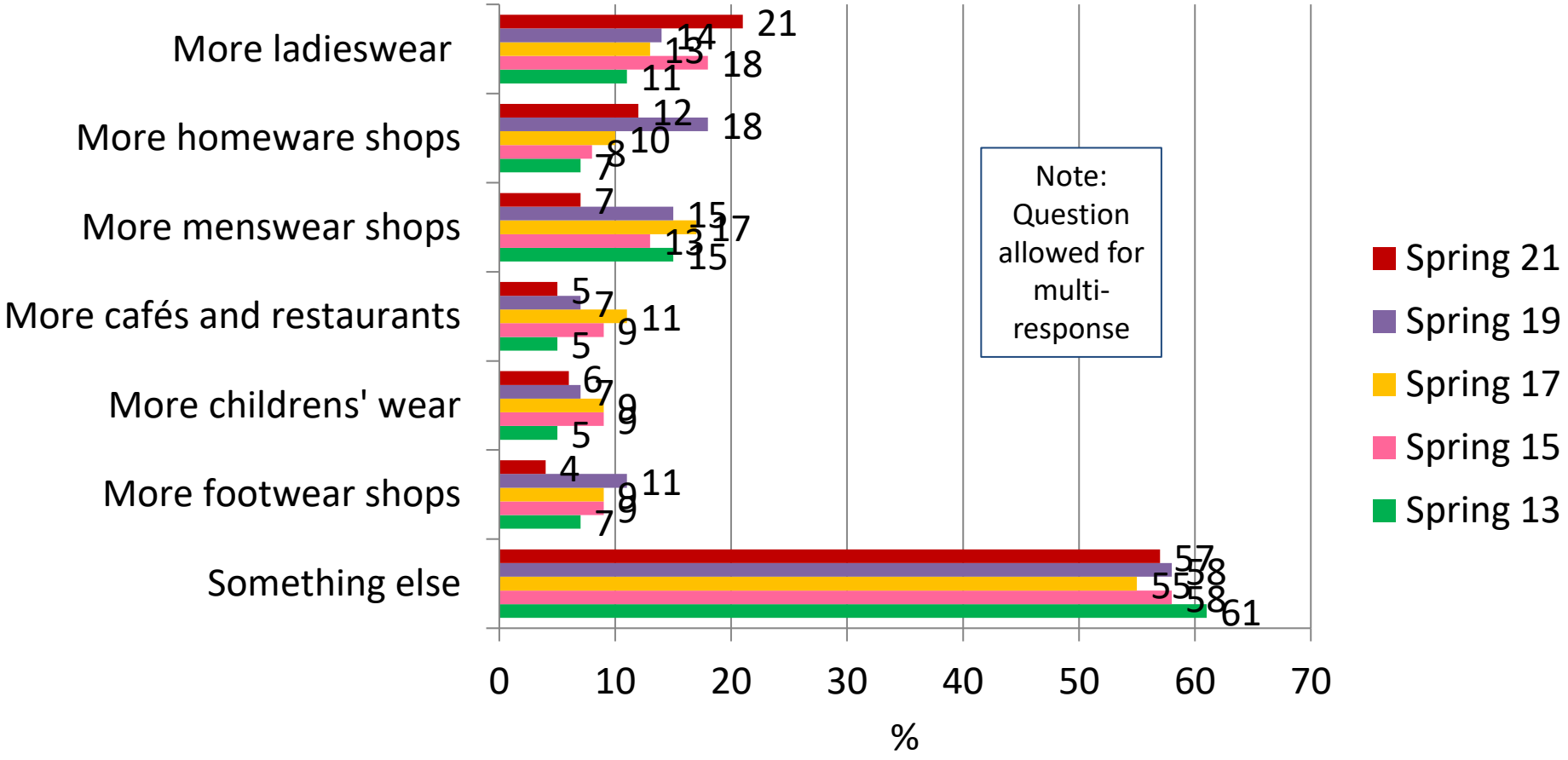
Retail Mix Changes

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

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



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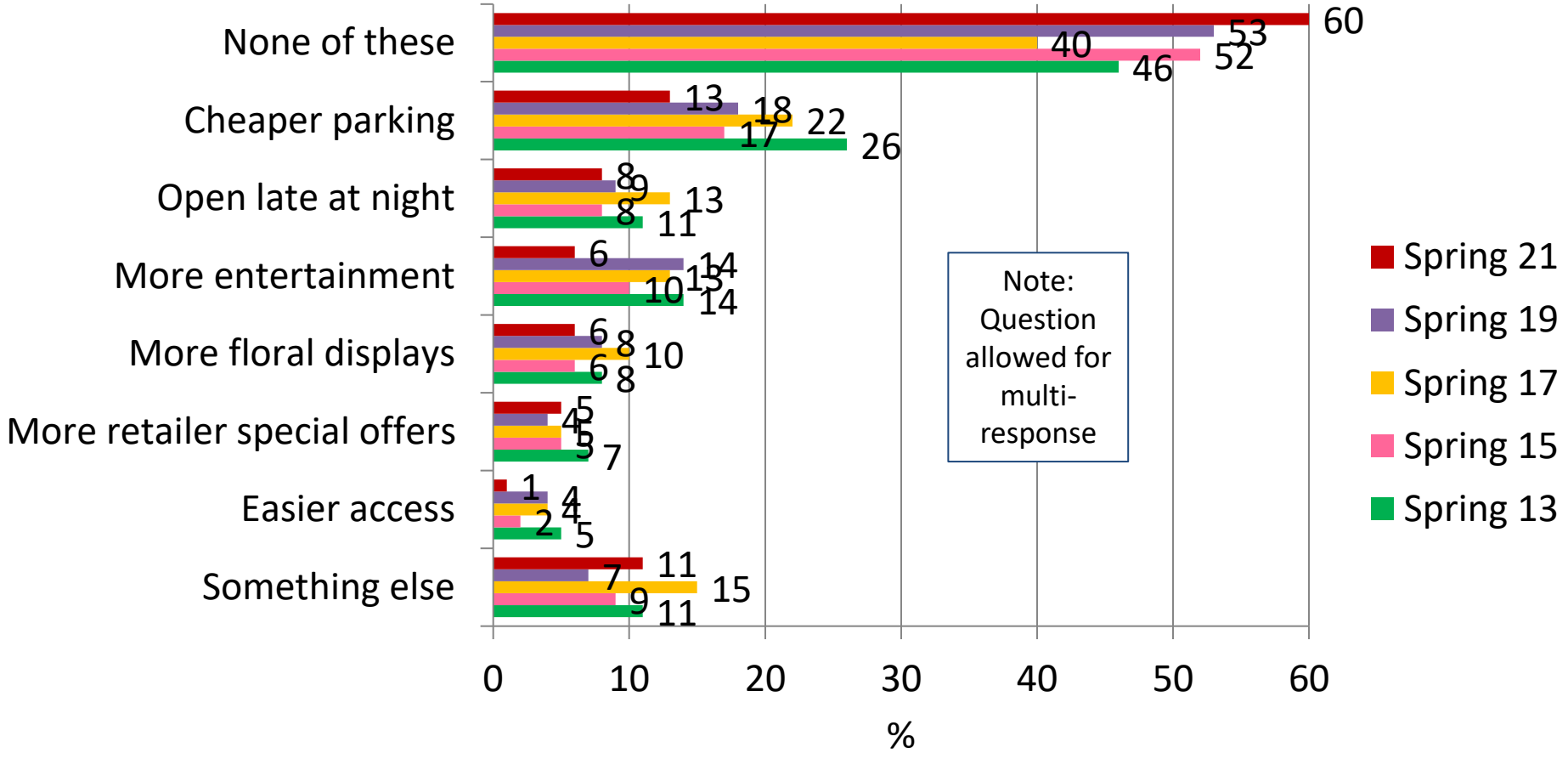
Service-related Changes

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

(n = all respondents)



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