

Chief Executive's Directorate; Corporate Research

Coventry City Centre Survey

Annual Survey 2011

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1. Executive Summary

The annual city centre survey gathers the views of both Coventry residents and those living in surrounding areas to assess the performance of the city centre. Information is collected from face-to-face interviews with the public in the city centre (city centre users) and via a telephone survey (collecting the views of both users and non-users). Since its start up in 1999 it has tracked city centre visitor patterns, perceptions and the impact of promotional tools.

Findings from the 2011 survey show the continued negative effects of the recession, with frequency of visits, average spend, proportion of the sample using Coventry City Centre as their main shopping centre and evening usage all having fallen annually since the recession hit. The survey also shows that the pinch is not only being felt in Coventry City Centre but other competitor centres, with fewer respondents visiting centres such as Solihull, Leamington and Birmingham for their shopping.

Trend analysis of evening safety concerns within the city centre show the proportion who say they feel unsafe has more than halved since the survey began in 1999 (from 63% in 1999 to 29% currently). Daytime safety concerns remain low with only 7% feeling unsafe during the day. The influence of threatening groups in the city centre is the aspect most likely to increase negative perceptions of safety.

Events are seen to play a key role in promoting the city centre, with 67% of respondents having visited at least one event in the last 12 months and 31% of attendees stating that visiting an event had increased their use of the city centre. Individually the expansion of the on-street markets has been very successful across all age groups and postcodes. City centre publications such as Feel Alive magazine also play a key role in promoting the city centre, 48% having seen this publication.

Findings from the perception analysis of city centre areas of service highlights the low (and falling) levels of satisfaction with parking charges in the city centre. Historically a series of tariff increases in city centre car parks have had a negative impact on satisfaction, but since this survey a short-term tariff cut will hopefully support retailing and alleviate visitors' negative perceptions. Other key performance results show the high importance placed on personal safety and cleanliness in creating an attractive city centre.

2. Introduction

CV One has been carrying out an annual programme of research since 1999 focussing on areas of service provided by the company in Coventry City Centre. Each year an extensive survey of Coventry residents and those living in nearby areas is carried out both on street and via telephone to provide a range of management information including patterns in visits to the city centre, perceptions of the city centre environment, evaluation of services provided, perceptions of safety, modes of travel and patterns in car parking.

3. Research Aims and Objectives

Focussing predominantly on CV One's core service areas, the aims of the 2011 research project were to provide information on the following areas:

1. Demographic Profile - to assemble a respondent profile including age, gender, postcode, occupation, adults and children in household and car ownership.
2. Profile of Visits (street survey only) - to determine respondents' reasons for coming to Coventry City Centre and intended shopping destinations on the day they were surveyed.
3. Overall Visit Patterns - to ascertain general patterns in respondents' usage of the city centre: frequency of visits made, duration of typical trip, average spend per visit, type of shopping, additional / alternative destinations and reasons for choosing Coventry City Centre as a shopping destination.
4. Evening Visitors - to measure evening visits to Coventry City Centre: purpose and frequency of visits and reasons for non-use of the city centre in the evening.
5. Sunday Visitors - to investigate the frequency of Sunday visits.
6. Perceptions of Safety - to gain an understanding of how safe or unsafe individuals feel in Coventry City Centre, both during the day and in the evening: investigating positive and negative influences on safety perceptions and the degree to which these perceptions relate specifically to Coventry City Centre.
7. Perceptions of Coventry City Centre - to evaluate stronger and weaker areas of service provision via questions concerning public satisfaction and expectations.
8. Mode of Travel & Car Parking – to investigate patterns in travel, with respondents who normally travel in by car being asked about their choice of car parking in the city centre.
9. Events and Marketing - to determine levels of attendance at CV One events and awareness of / interest in publications produced by CV One.

4. Methodology

The annual survey consists of two parts, an on-street survey and a telephone survey. Data from both survey formats have been combined to give a better understanding of the perceptions of the population of Coventry as a whole, encompassing the views of both users of the city centre (street survey) and those of general households within Coventry who may or may not use the city centre (telephone survey). Combining the two data sets also helps in preventing skewed results (e.g. for postcode, age and gender) that have often been inherently displayed by the two collection methods.

Data collection was carried out as follows:

i) Street survey: The street survey targets the average user of Coventry City Centre, looking to gather a representative sample of visitors and assess their perceptions. The 2011 survey ran from Monday 25th July to Friday 12th August 2011 inclusive (including Saturdays but excluding Sundays). Interviews were carried out around Precinct Cross in the city centre between 10a.m. and 2p.m. daily.

618 questionnaires were completed on street.

ii) Telephone survey: The telephone survey focuses on both users and non-users of Coventry City Centre, taking a sample group from Coventry postal code areas across the city and its surrounding areas. Telephone interviews were carried out during the 3 week period commencing Monday 25th July 2011, conducted at different times during the week/weekend and daytime/evening to ensure demographic range and diversity. Interviews were conducted with a person responsible for household shopping.

1,131 questionnaires were completed via telephone.

In both formats, the same questionnaire was employed (with the exception of some additional questions at the beginning of the street version regarding the respondent's visit on the day of the survey). A fully rather than semi-structured approach was utilised to ensure all questions were asked in the same way and sequence for each respondent, in order to reduce interviewer bias. The direction gained from respondents being interviewed rather than self-completion impacts positively in three ways: assisting respondents to gain full understanding of all question areas, encouraging full responses and helping to direct respondents efficiently through the survey.

The 1,749 surveys returned were collated and analysed and this report will illustrate and discuss the main findings. A sample size of at least this number can be said to adequately represent the views and actions of those within each postcode area and within the wider population as a whole¹.

The section 'Perceptions of the City Centre' includes an interpretation of satisfaction and importance ratings given by respondents to a number of services provided in the city centre. The model of interpretation used was developed at the University of Central England² and facilitates an evaluation of all performance areas. This includes an illustration of the strength of action required in response to public perception. A full discussion of this method of interpretation is detailed in appendix 1.

A copy of the questionnaire is available on request.

¹ At the 95% confidence level, a sample size of 1,724 from a total population of 315,700 equates to a margin of error that is plus or minus 2.35% i.e. a figure of 40% can be said to lie within a range no wider than 37.65% and 42.35%.

² HARVEY, L., MOON, S. & PLIMMER, L., 1997, *The Student satisfaction manual* (Buckingham, SRHE / Open UP)

5. Data Analysis and Results

5.1. Demographic Profile

Respondents were asked to give demographic information including postcode, age, gender, occupation, household composition and car ownership.

Figure 1.1: Postcode distribution

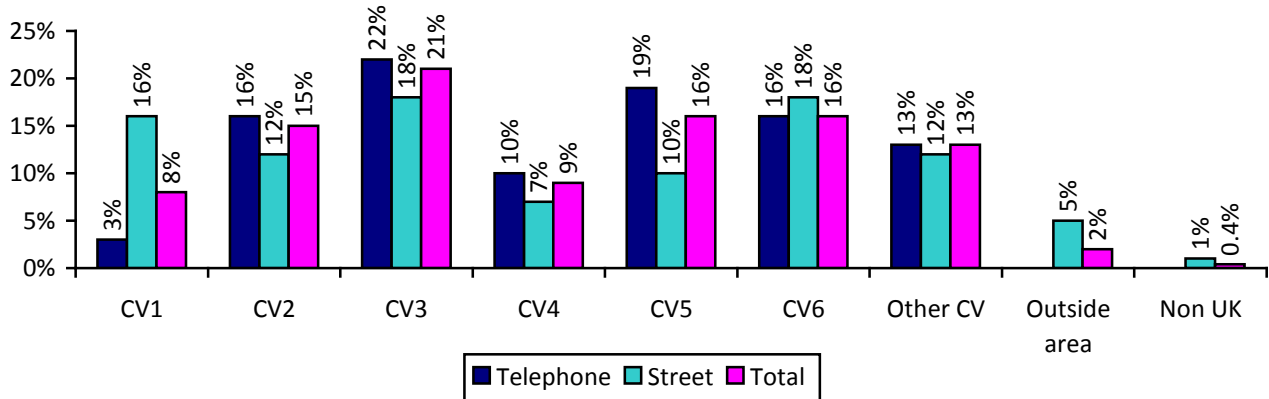
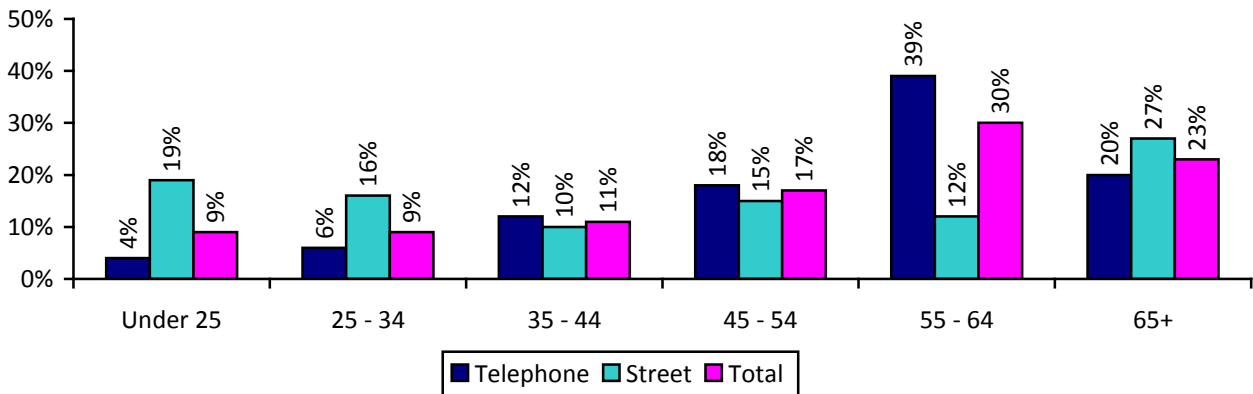


Figure 1.1 shows that 85% of respondents had a CV1 to CV6 postcode, with each of the six Coventry districts producing sample sizes of between 8% and 21% of respondents. Contrasting the two survey formats, respondents from a CV1 postcode were more likely to be interviewed via the street survey. 15% of respondents were residents outside Coventry, most of these being individuals with a Warwickshire (other CV) postcode.

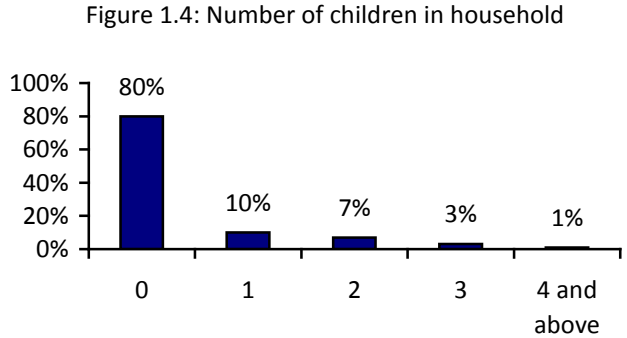
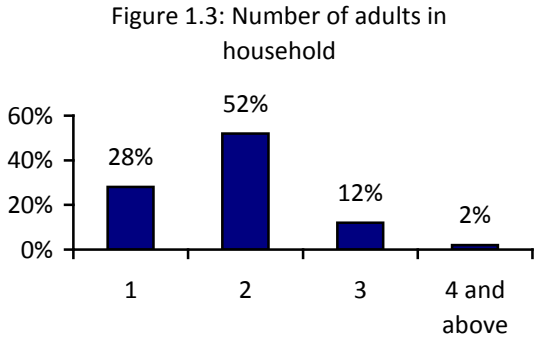
Figure 1.2: Age distribution



In terms of age distribution, the telephone survey has historically returned a higher proportion of over 65s, while all age groups have been more evenly represented in the street survey. This year the telephone survey looked to offset recent patterns of a growing response rate from the over 65 subset by means of a cap on this age group, but this inadvertently served only to increase the response rate of those aged between 55 and 64 years of age (fig 1.2).³

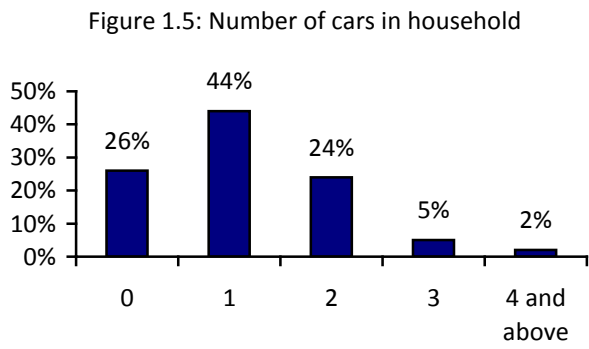
Profile of gender revealed 59% of respondents to be female, 41% male. The street sample gathered a slightly more even mix with 48% female, 52% male responses compared to the telephone sample where the ratio was 64% female to 36% male.

³ The under 25 age bracket is seen to have the largest margin of error, plus or minus 7.81% i.e. a figure of 40% can be said to lie within a range no wider than 32.19% and 47.81%.

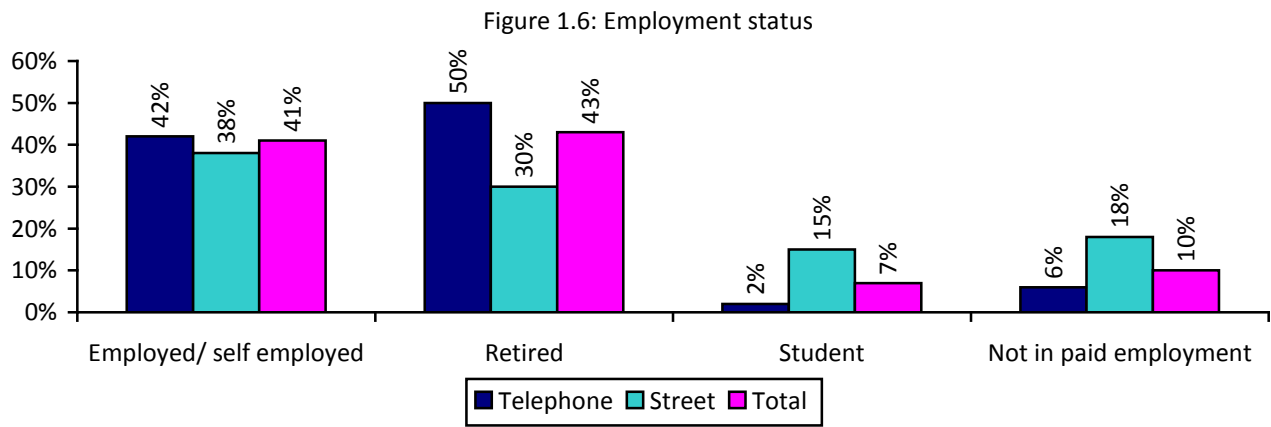


In common with the 2010 survey, just over half of the sample reported that they lived in a two adult household (52%). 28% were the sole adult at home while just 2% were part of households comprising of 4 or more adults (fig. 1.3).

The majority of respondents were from a household with no children (80%). 10% had one child living with them and 7% two children. A minority had more than two children (fig. 1.4).



26% of the sample came from a household without a car but the majority of the sample had access to at least one car. 44% came from households owning a single vehicle, 24% had two cars and 7% came from households where there were three or more cars. Again, these results varied little from the previous year's findings.



Breakdown of the sample by occupation revealed that 41% of respondents were currently in paid employment (37% in 2010). Unsurprisingly, given the age demographic already discussed, nearly half of the sample indicated that they were retired (43% compared to 47% in 2010). 7% were students and the remainder were not earning a wage being either job seekers, on other benefits or looking after home and family full-time.

As has traditionally been the case, more students were interviewed as part of the street survey (15% compared to 2% via telephone) while the telephone survey obtained a greater sample of retired respondents (50% compared to 30% on street).

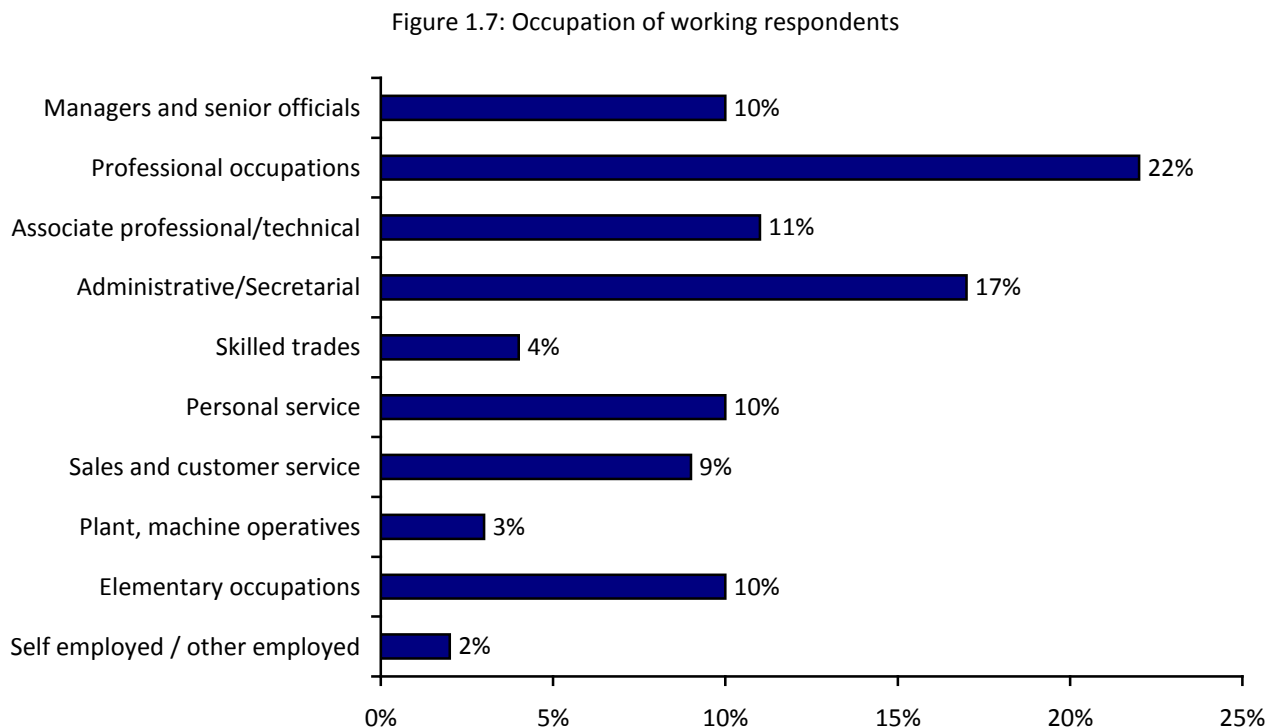
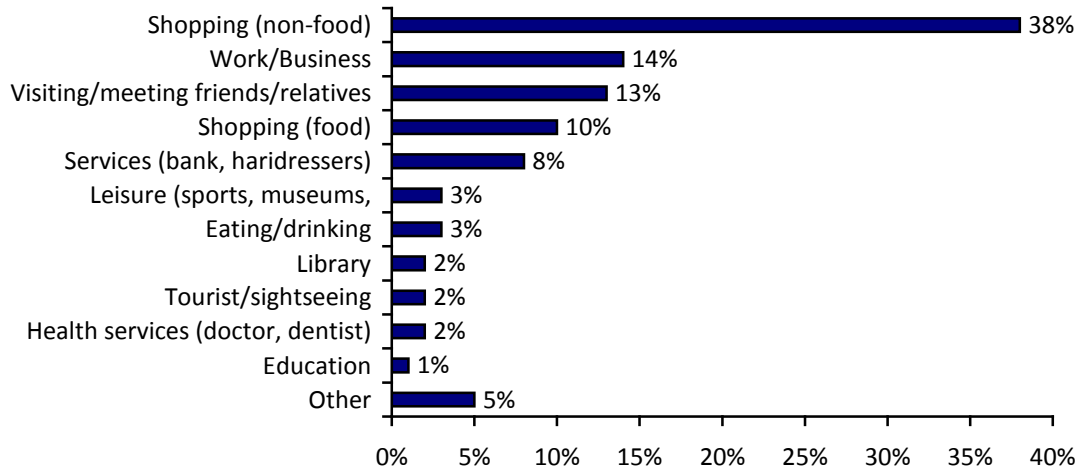


Figure 1.7 shows grouped occupation of those in employment. Professional occupations were the most common employment reported (22%) followed by those working in an administrative role (17%). 2% were either self employed or gave employment details which did not allow for further classification.

5.2. Profile of visits on day surveyed (street survey only)

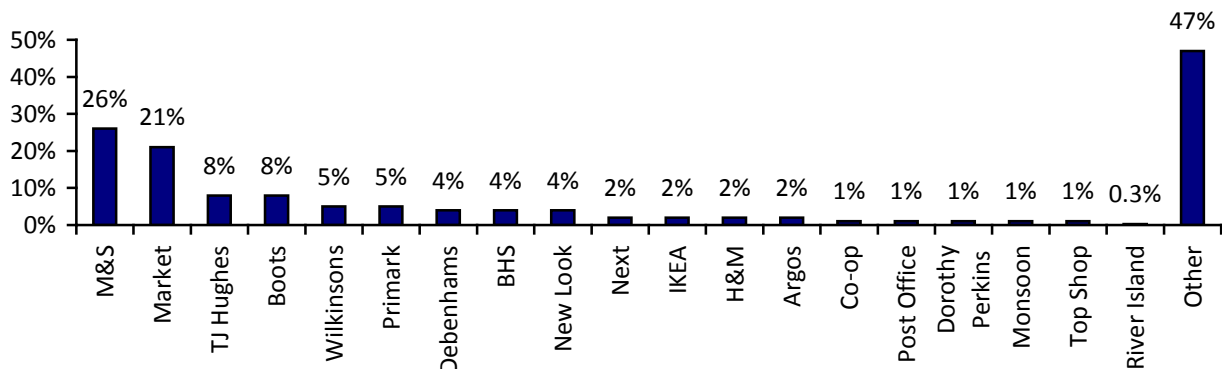
The street survey contained some initial questions to examine the particular visit a respondent was making to Coventry City Centre on the day that s/he was interviewed. These questions were not applicable to telephone survey respondents therefore the sample size for this section is 618. Question areas included reasons for coming to the city centre and intended shopping destinations during the visit.

Figure 2.1: Main reason for visiting Coventry City Centre



As has proved the case in past surveys, respondents most commonly cited non-food shopping as their main reason for visiting Coventry City Centre on the day they were surveyed (38%) however this proportion was less than the 56% who said they were non-food shopping in the 2010 survey. 14% of the sample were visiting for work or business reasons while 13% said that they were in town to meet up with friends or family. Of the 52% who said that they were visiting the city centre primarily for a reason other than shopping, just over half (56%) said they would also be doing some form of shopping during their visit.

Figure 2.3: Stores intended to visit whilst in Coventry City Centre

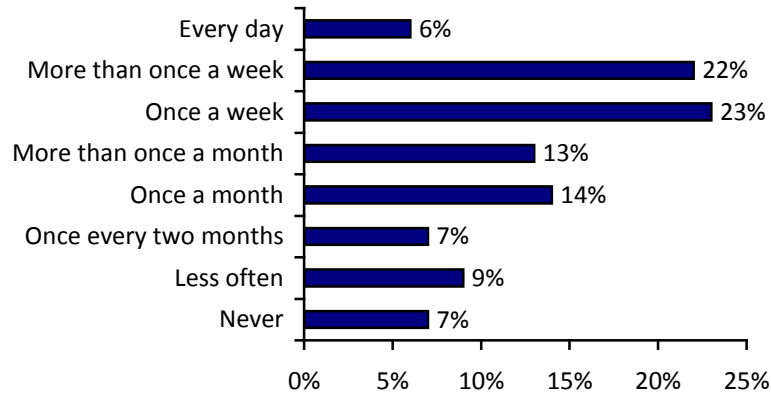


65% of those respondents who were shopping said that they intended to visit a specific store. Figure 2.3 gives a full breakdown of those stores intended to visit, showing that Marks & Spencer and the Retail Market were the most popular locations, with 26% and 21% respectively. Other favoured destinations were the now closed TJ Hughes (8%), Boots (8%), Wilkinsons (5%) and Primark (5%).

5.3. Overall pattern of visits

All respondents were questioned about their typical use of Coventry City Centre for shopping, including frequency of visit, duration of a typical visit, average spend per trip, reasons for choosing Coventry and types of shopping.

Figure 3.1: Frequency of trips to Coventry City Centre mainly for shopping



The majority of users visited the city centre once a week or more frequently, hence 52% of respondents were classified as frequent users. 33% of respondents were classified as a medium user, generally visiting between more than once a month and once every two months. The remaining respondents were those who visit less often and those who never visit the city centre for shopping, representing 9% and 7% of the sample respectively.

Figure 3.2: Average frequency of trips to Coventry City Centre mainly for shopping

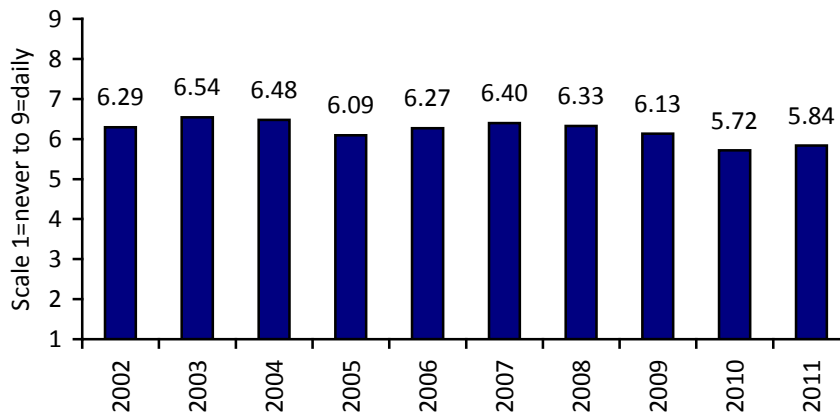
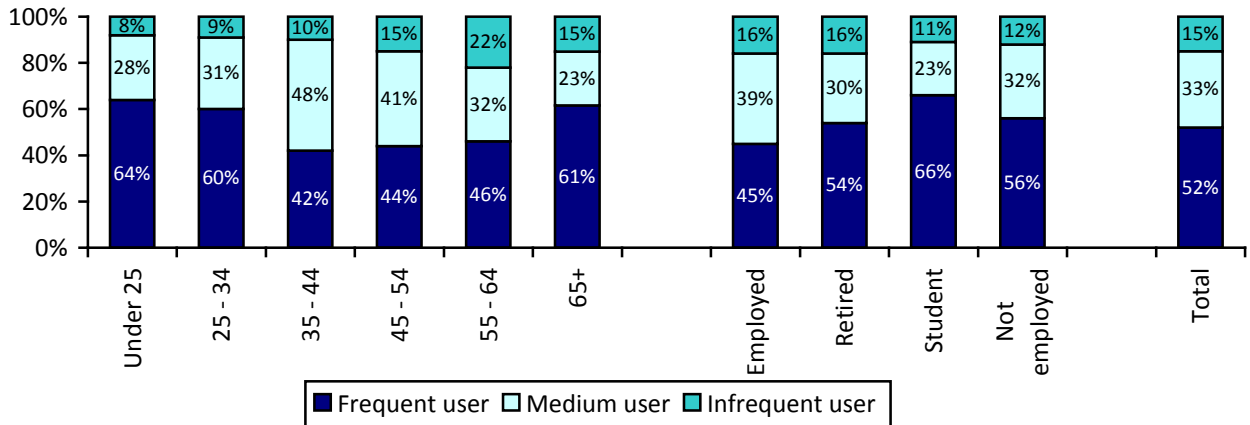


Figure 3.2 shows the trend analysis of average frequency of visits to the city centre (on a scale of 1 being never and 9 being daily). Frequency of city centre visits for shopping has fallen below an average of 6 in the last two years, suggesting negative effects of the recession on visitor patterns.

Figure 3.3: Frequency of use against age and employment



In common with past surveys, the highest proportions of frequent use were demonstrated amongst those likely to have more free time during the week in which to visit the city centre, namely, those groups not in employment, under 25 year olds and those aged 65 or over (fig.3.3).

Figure 3.4: Typical length of time spent shopping in the city centre per visit

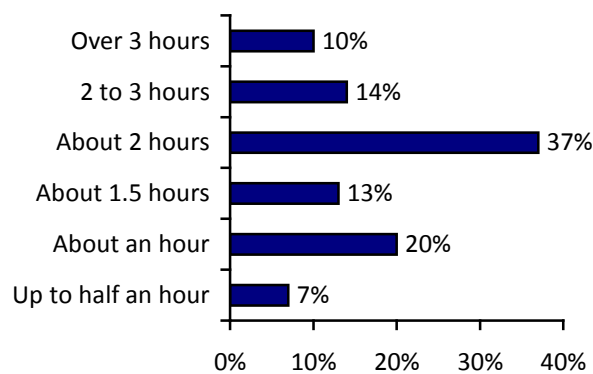
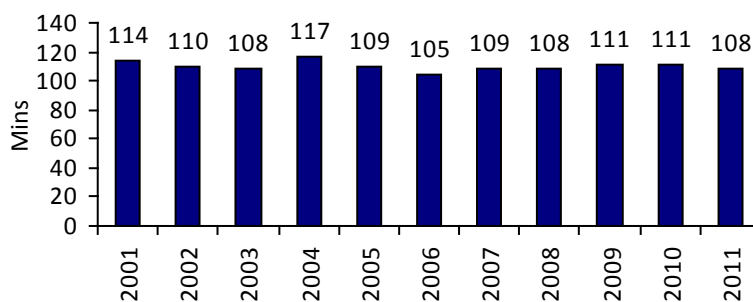


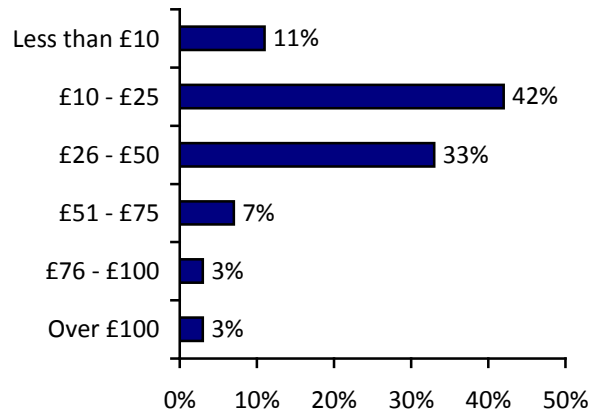
Figure 3.4 shows how long visitors generally spend in the city centre per visit, this illustrates that just over a third visit for about two hours (37%). 24% spend over two hours in the city centre on a typical trip and 40% spend one and a half hours or less per visit.

Figure 3.5: Average length of time spent shopping in the city centre per visit



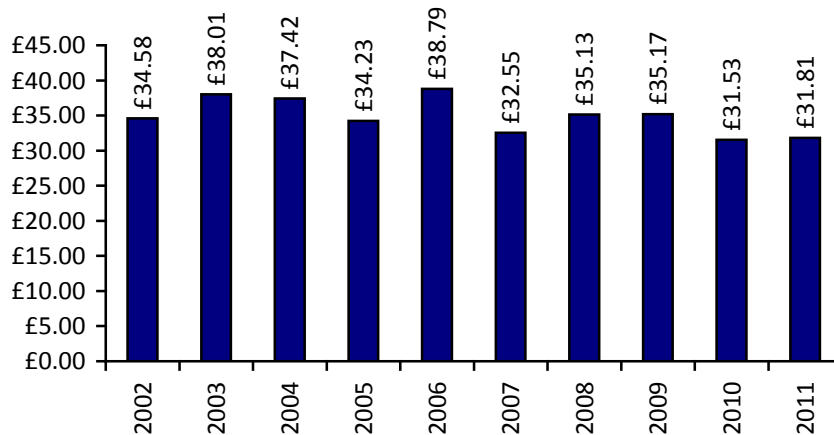
On average, respondents reported spending 108 minutes in the city centre on a typical shopping trip, a figure which has fluctuated very little over the years (only 12 minutes variance between the highest and lowest results).

Figure 3.7: Typical spend per visit



Asked for the amount they spent on a typical shopping trip to Coventry City Centre, respondents most commonly reported between £10 and £25 (42%) or between £26 and £50 (33%).

Figure 3.8: Average spend per visit



The mean reported spend per head on a typical trip was £31.81. Trend analysis continues to show the effects of the recession on spending, with the average remaining lower than pre 2010 results.

Figure 3.9: Average spend per visit against frequency of visit

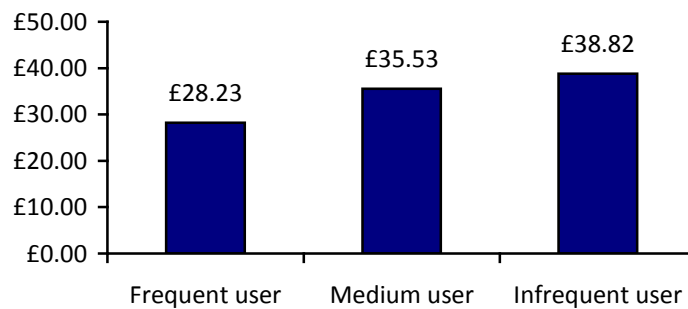
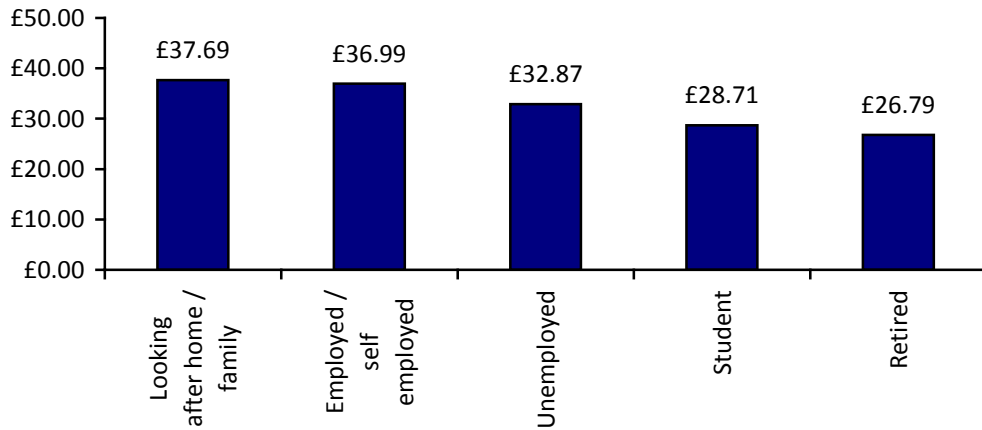


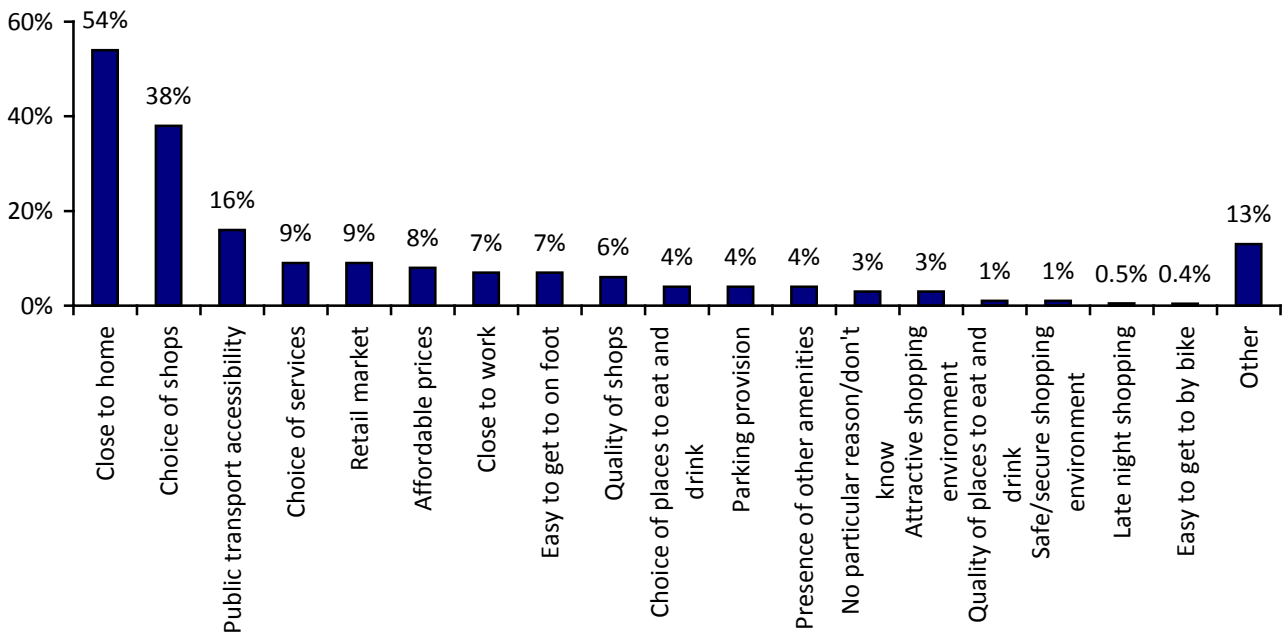
Figure 3.9 shows the cross-analysis of visitor spend against frequency of city centre visits, showing that those respondents who visit less frequently generally spend more per visit.

Figure 3.10: Average spend per visit against employment status



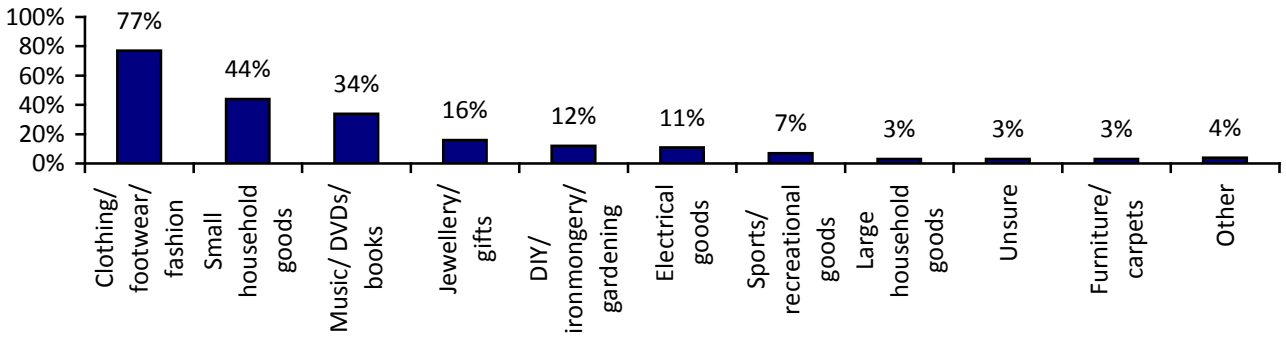
Cross-tabulation of average spend and occupational sector revealed that individuals looking after home & family full-time spent the most, on average, per shopping visit (£37.69). Employed people spent the second highest amount, £36.99 per visit on average (being closely linked to frequency of visits).

Figure 3.13: Main reason for choosing Coventry City Centre for shopping trip



Respondents were asked to give their main reasons (up to three) for choosing to shop in Coventry City Centre. The two most popular reasons were proximity to home (54%) and choice of shops (38%).

Figure 3.15: Types of non-food shopping done reasonably frequently

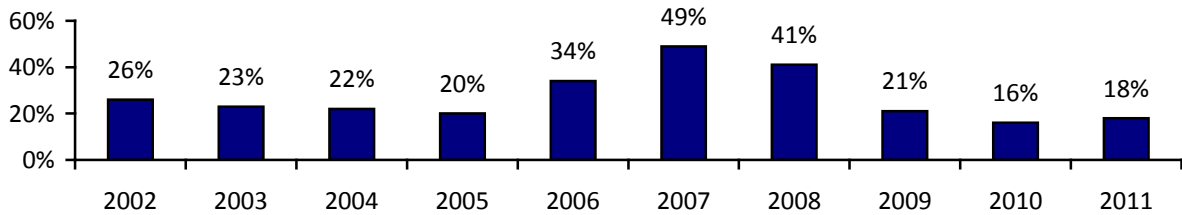


Asked to specify what types of non-food shopping they did fairly regularly, respondents indicated that their main purchases were clothing, footwear and other fashion items (77%). 44% specified small household goods and 34% frequently bought music, videos or books.

5.4. Food and non-food shopping

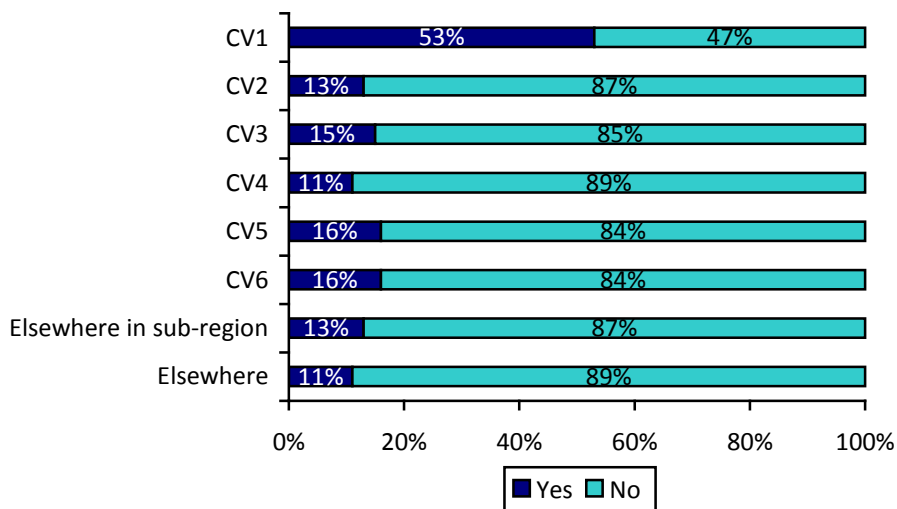
Use of Coventry City Centre for food and non-food shopping was investigated further, including respondents' additional and alternative destinations.

Figure 4.1: Proportion whose main centre for food shopping was Coventry City Centre

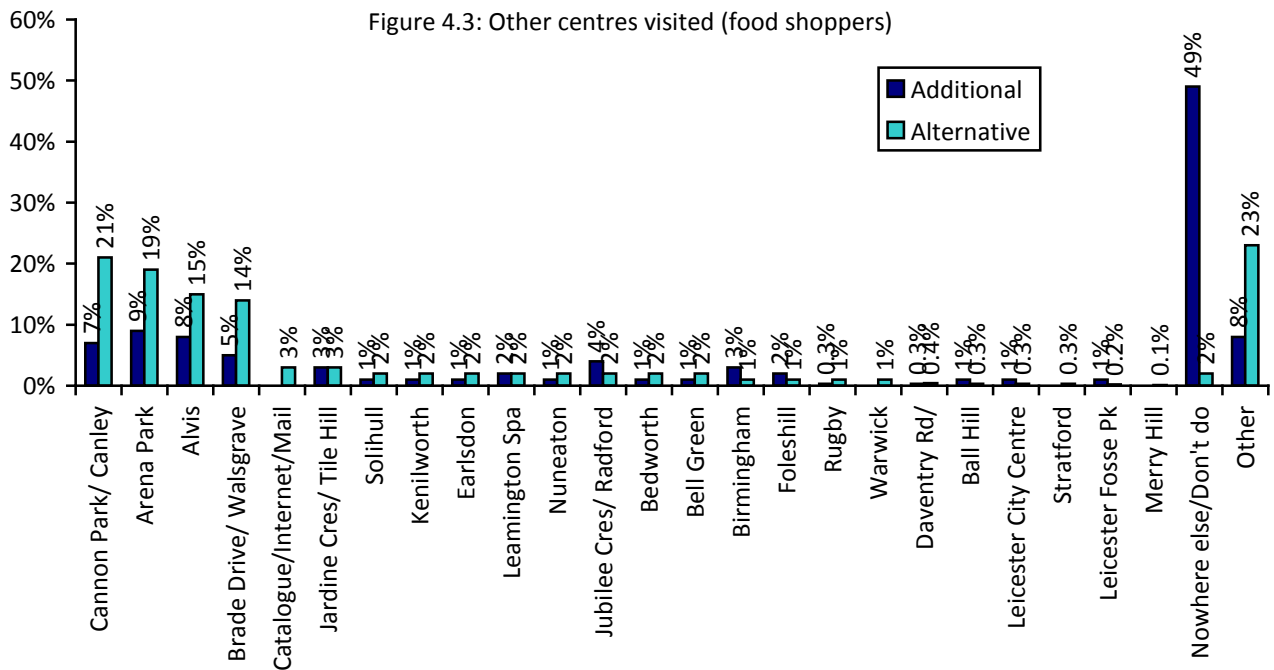


18% of the sample said that they normally did their main food shopping in Coventry City Centre.

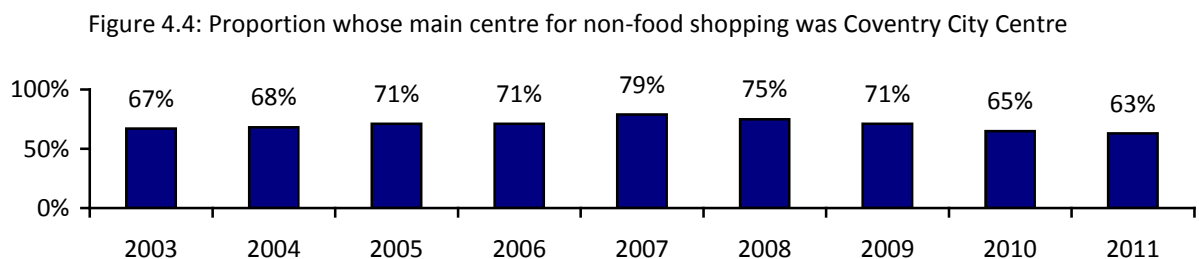
Figure 4.2: Main food shopping in the city centre against postcode



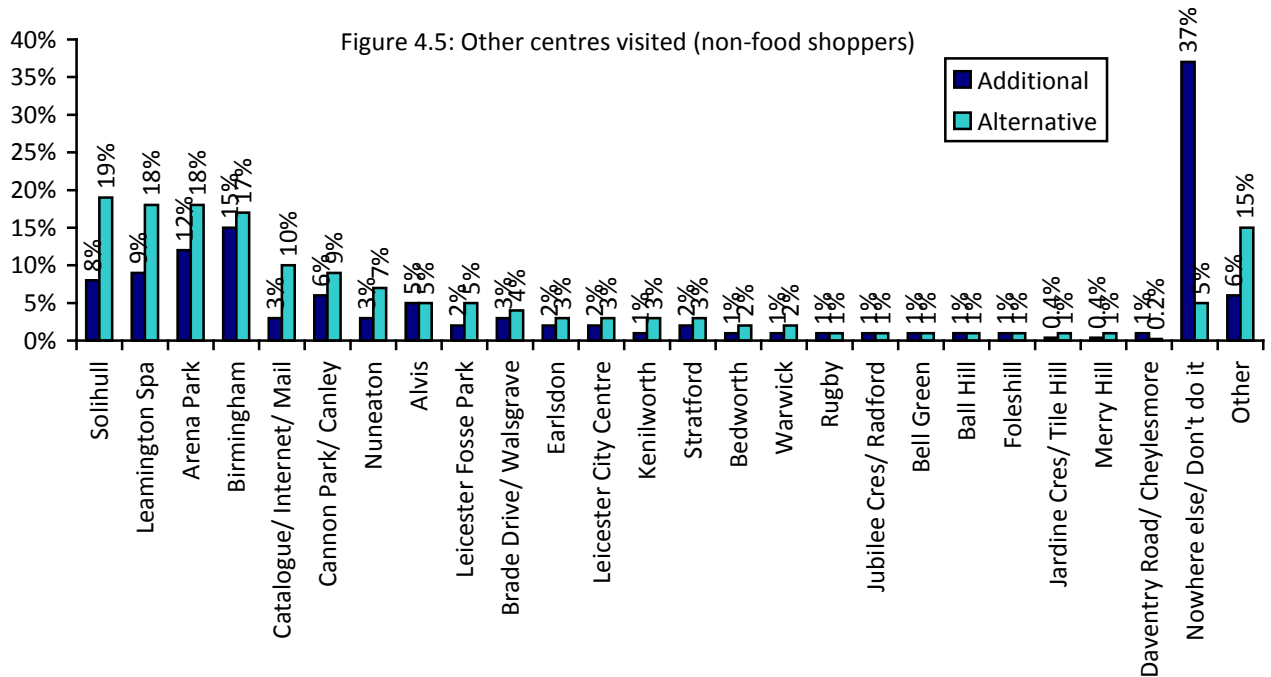
Further analysis showed that respondents who resided in CV1 postcodes relied most heavily on food shopping in the city centre, with 53% of respondents stating that the city centre was their main centre for food shopping (fig. 4.2).



If respondents said Coventry city centre was their main centre for shopping, then other centres visited are referred to as additional centres. If respondents said Coventry city centre was not their main centre for shopping, then centres visited are referred to as alternative centres and are arguably Coventry city centre's main competitors. The majority of respondents (49%) who stated that the city centre was their main centre for food shopping indicated that they solely used the city centre (fig. 4.3). Most visited additional locations were Arena Park (9%), Alvis (8%), Cannon Park/ Canley (7%) and Brade Drive/ Walsgrave (5%). Non users of the city centre for food shopping were most likely to buy their food at Cannon Park/ Canley (21%), Arena Park (19%), Alvis (15%) and Brade Drive/ Walsgrave (14%).



In respect of choice of centre for main non-food shopping, the majority of respondents (63%) said that they predominantly visited Coventry City Centre for the purchase of clothes and other non-food items.



In terms of major areas of competition i.e. alternative destinations to Coventry City Centre, Solihull (19%), Leamington Spa (18%), Arena Park (18%) and Birmingham (17%) were seen to be the most notable alternatives to Coventry City Centre for non-food shopping.

Over a third of those respondents who reported doing the bulk of their non-food shopping in Coventry City Centre said that they shopped nowhere else. Additional retail centres visited by city centre users were Birmingham (15%), Arena Park (12%), Leamington Spa (9%) and Solihull (8%).

Figure 4.6: Additional main centres used for clothes / non-food shopping

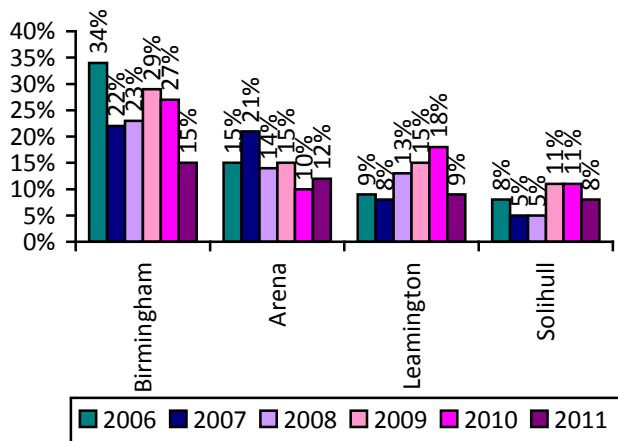
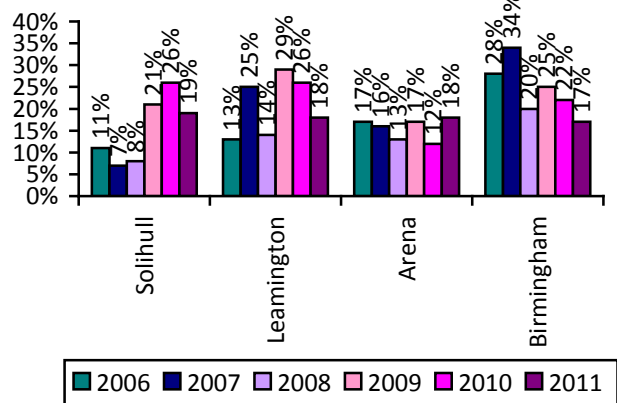
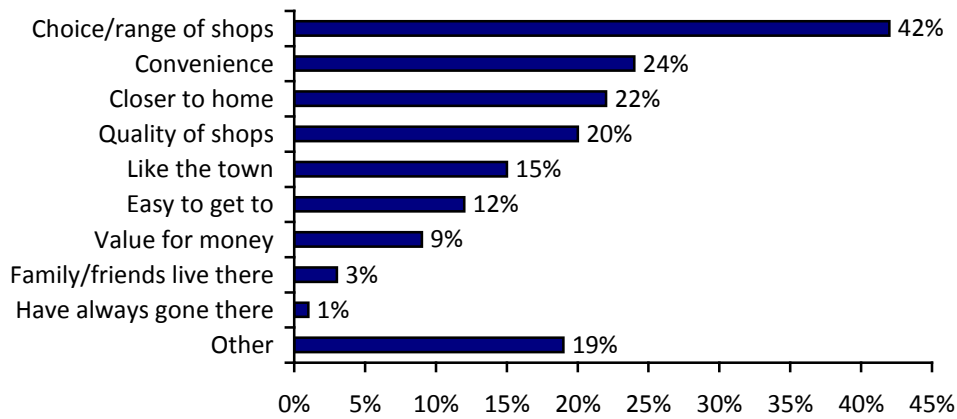


Figure 4.7: Alternative main centres used for clothes / non-food shopping



The same four centres were most commonly cited as alternative and additional destinations for non food shopping by respondents (figs. 4.6 and 4.7). Closer inspection shows that the top four alternative centres are a reversal of the top four additional centres. This suggests that Solihull and Leamington are the main competition (alternative to Coventry City Centre), most probably due to them offering a wide choice and being closer to Coventry than Birmingham. This year's trend analysis shows that most destinations were seen to fall in their market share, which may be linked to the recession and less disposable income, discouraging shoppers from travelling as far and/or as frequently for their non-food shopping.

Figure 4.9: Reasons why Coventry City Centre is NOT respondent's main centre for clothes / non-food shopping

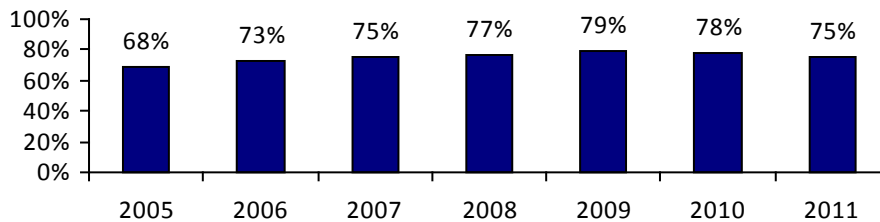


Respondents who did not use the city centre and chose to shop in an alternative centre, most commonly said they did this because of choice and range of shops on offer at alternative centres. Other notable reasons were convenience, proximity to home, quality of shops and a liking for the alternative destination.

5.5. Out-of-town retail

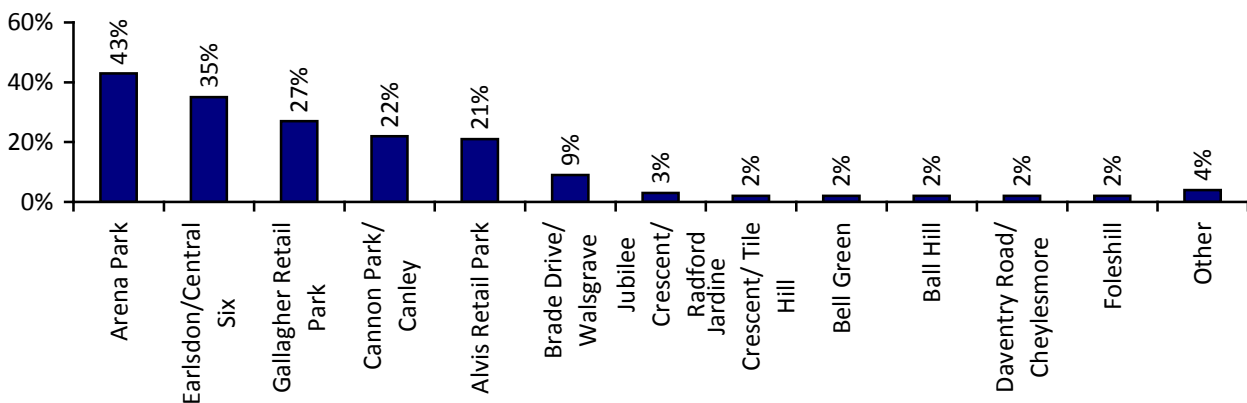
Respondents were asked about their use of out-of-town retail complexes and the impact this may have had on their use of Coventry City Centre.

Figure 5.1: Do you use out-of-town retail parks



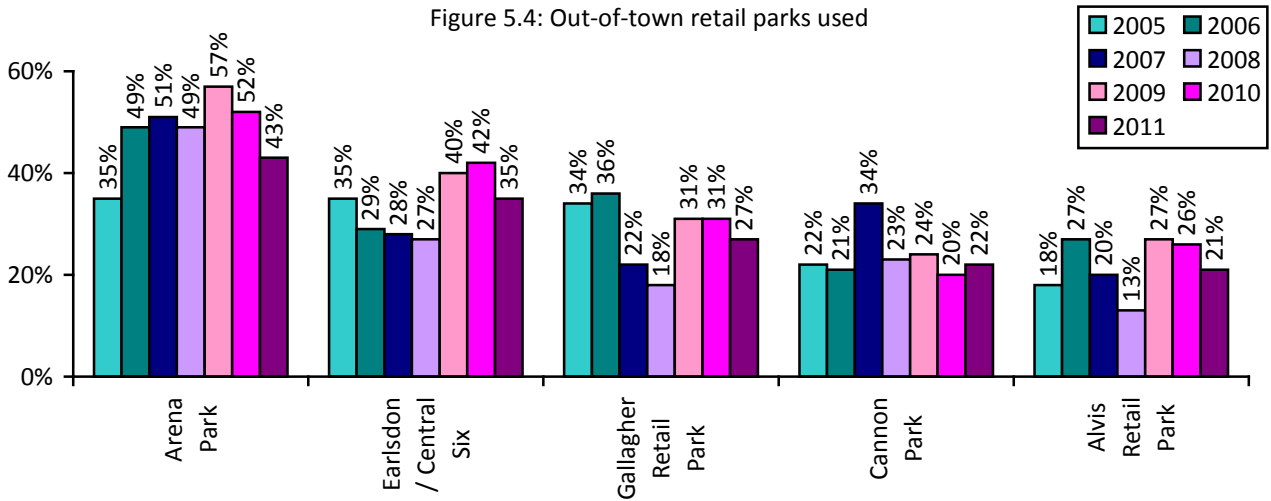
Three quarters of all respondents shopped in an out-of-town retail park (75%). This proportion has slightly fallen off since rising to a 2009 high of 79%.

Figure 5.3: Out-of-town retail parks used



The Arena Retail Park and Earlsdon / Central Six are the most popular out-of-town retail parks with 43% and 35% respectively.

Figure 5.4: Out-of-town retail parks used



In common with alternative and additional destination analysis, most centres have seen a fall in the proportion of users; this, in addition to the fall in Coventry city centre users, suggests a contracting market rather than movement in market share, with the recession limiting shoppers' choice to fewer centres (fig.5.4).

Figure 5.5: Have out-of-town retail parks reduced your use of Coventry City Centre - Food

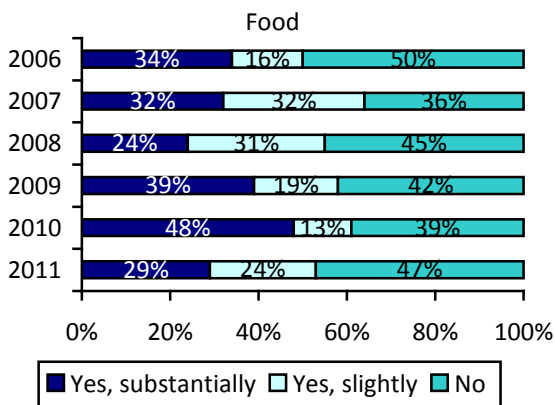
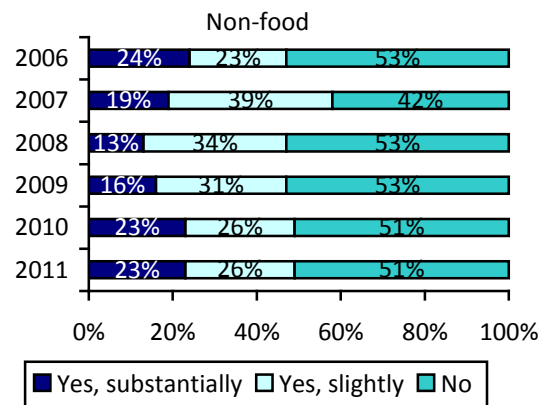


Figure 5.6: Have out-of-town retail parks reduced your use of Coventry City Centre - Non-food



Impact analysis of out-of-town retail parks on the city centre shows that, generally, half of respondents have reduced their use of Coventry City Centre for both food and non-food shopping. Retail parks' impact on food shopping had slightly fallen compared 2009 and 2010 results.

5.6. Other uses of Coventry City Centre and respondent wishlist

Figure 6.1: Use Coventry City Centre for reasons other than shopping

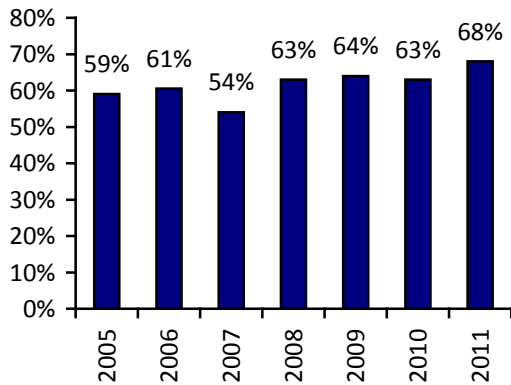
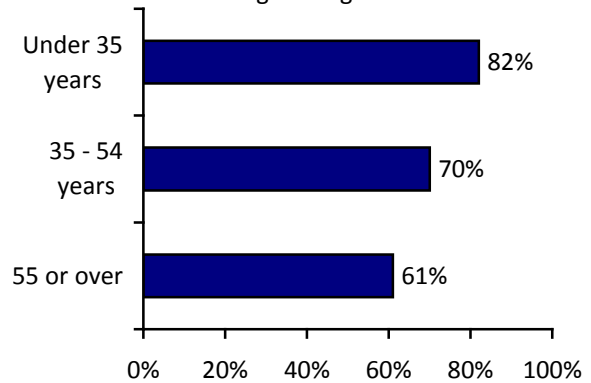
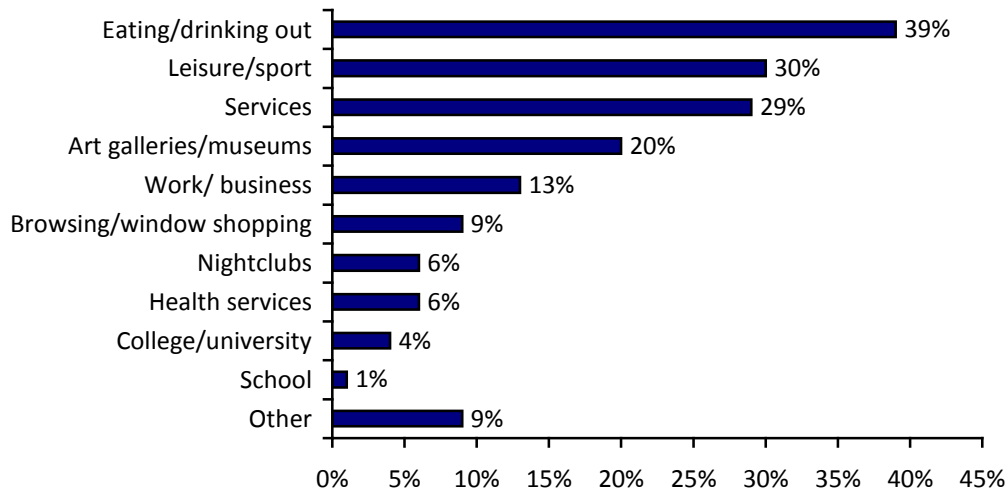


Figure 6.2: Use city centre for other reasons against age



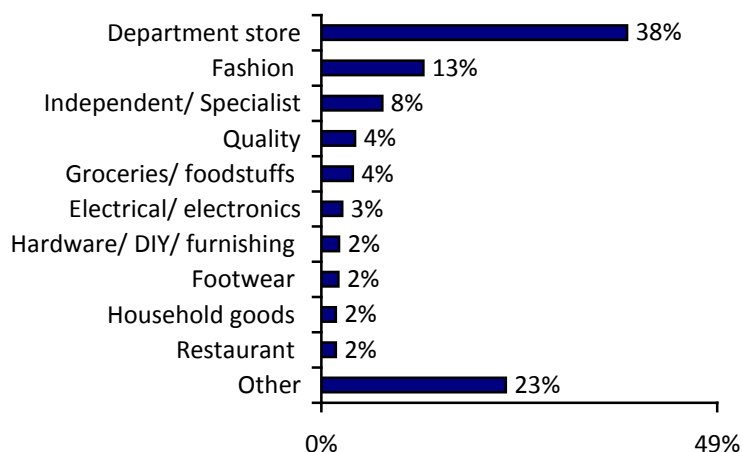
68% of respondents indicated that they use the city centre for reasons other than shopping. Those using the city centre for other reasons were more likely to be those younger age groups, with 82% of those aged under 35 years using the city centre for reasons other than shopping.

Figure 6.3: Other reasons for visiting Coventry City Centre



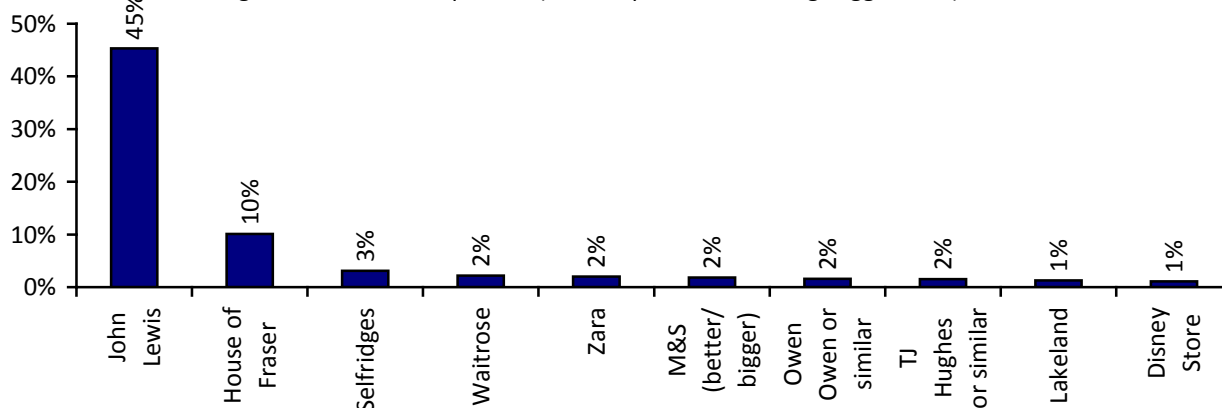
Eating/drinking out, leisure/sport and services were the most popular non-shopping activities for which respondents use the city centre (39%, 30% and 29% of respondents respectively).

Figure 6.4: Type of shop requested (% of suggestions made)



Respondents were asked which new brands they would like to see in the city centre; 62% of respondents gave at least one request. Figure 6.4 shows the breakdown of these suggestions grouped into shop type, with the majority wanting to see a new department store added to the current offer within Coventry City Centre.

Figure 6.5: Brands requested (% of respondents making suggestions)

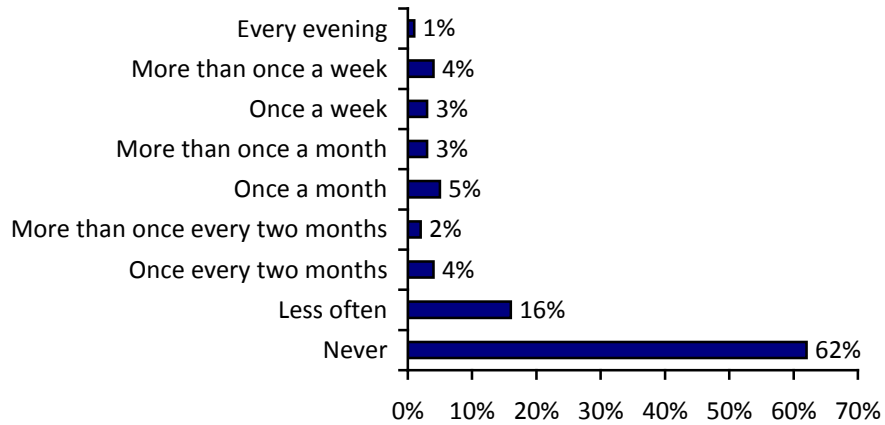


In line with previous years' results John Lewis is clearly the most sought after store, with just under half of respondents who made a suggestion wanting to see this store opened in Coventry City Centre. Another department store, House of Fraser, is the second most desired store with 10% of respondents. The survey gathered 161 individual brand names, with some respondents requesting either stores that have closed in the city centre (e.g. Owen Owen and TJ Hughes) or mentioning stores which already exist in the city centre (e.g. M&S), but requesting better or bigger stores

5.7. Evening Visits

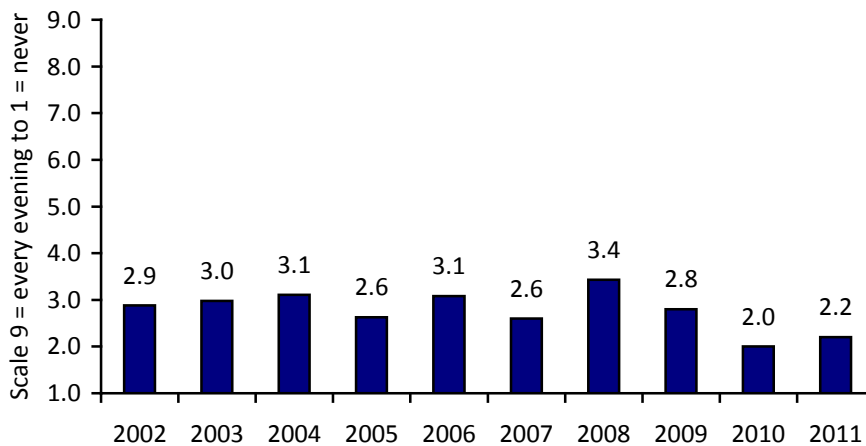
This section posed questions on visits to Coventry City Centre in the evening, including frequency and purpose, and asked respondents for their impressions of the city centre at night.

Figure 7.1: Frequency of trips to Coventry City Centre in the evening



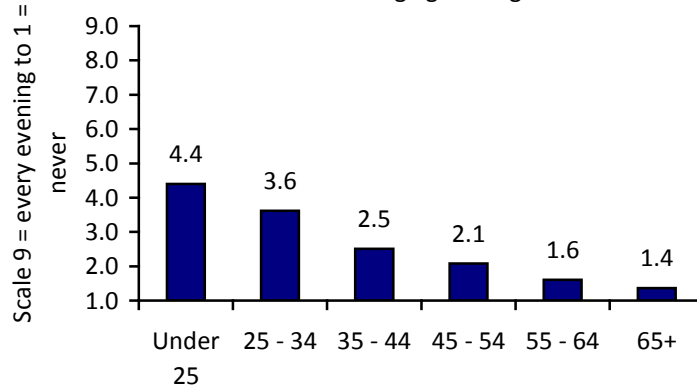
Only 38% of the sample reported that they visited Coventry City Centre in the evening. 16% visited once a month or more often. The majority of respondents (62%) said that they never visited the city centre in the evening.

Figure 7.2: Average frequency of trips to Coventry City Centre in the evening



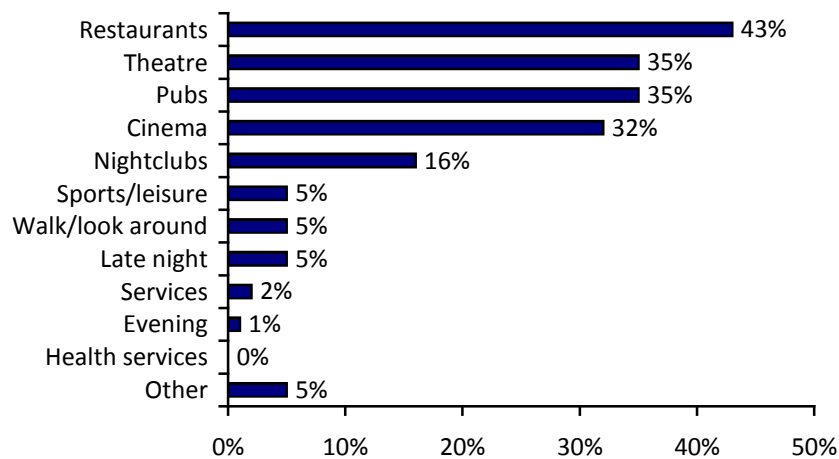
In line with other measures of frequency of visits, average evening usage has fallen over the last two years to the lowest levels in the survey history, again suggesting the recession's influence.

Figure 7.3: Average frequency of trips to Coventry City Centre in the evening against age



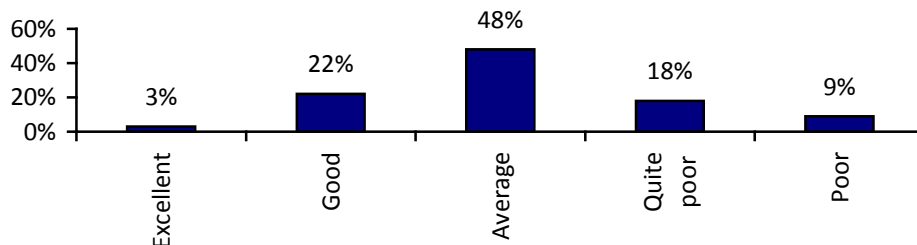
There was a correlation between age and evening usage of the city centre, cross-tabulation showing that (on the same scale of 1 to 9) very few respondents from older age groups used the city centre in the evening.

Figure 7.4: Reasons for visiting Coventry City Centre in the evening



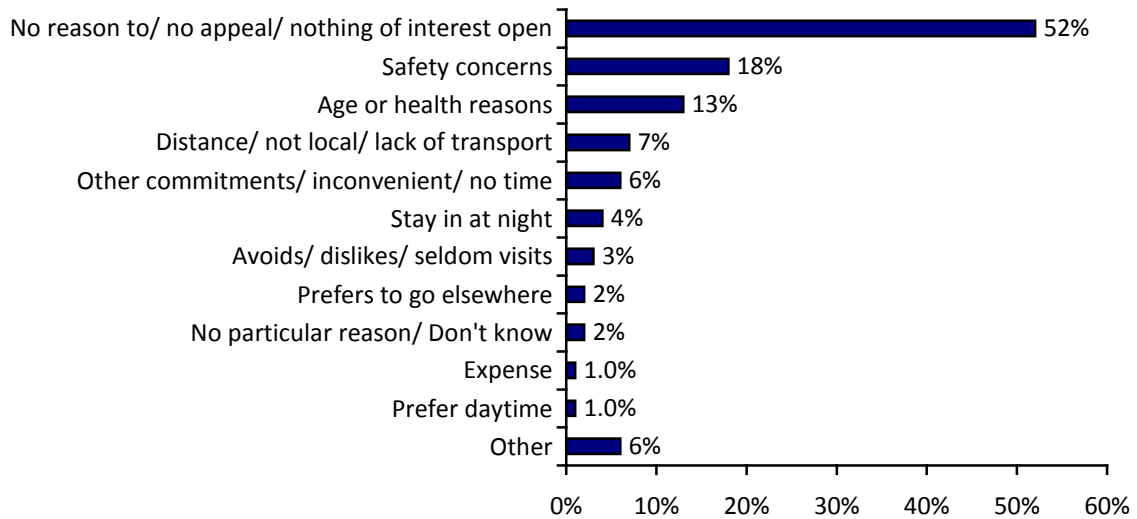
The most common reasons given for visiting Coventry City Centre in the evening were to visit restaurants (43%), the theatre (35%), pubs (35%), the cinema (32%) and nightclubs (16%).

Figure 7.5: Overall impression of Coventry City Centre in the evening



Only 25% of respondents who visited in the evening said that their impression of the city centre at this time was either excellent or good. The majority thought the city centre in the evening was average (48%) and the remainder (27%) said it was quite poor or poor.

Figure 7.6: Reasons for not visiting Coventry City Centre in the evening

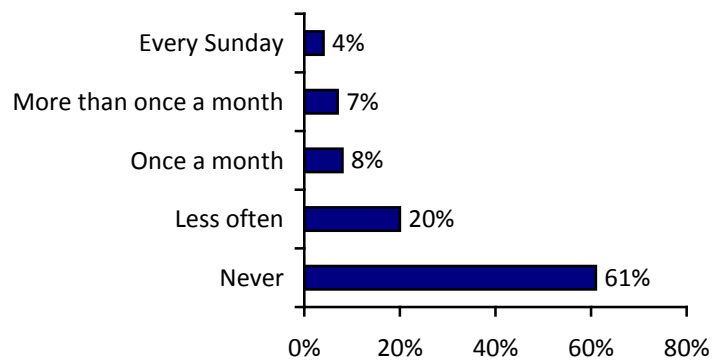


The majority of respondents who did not visit the city centre during the evening said this was due to a lack of appeal (52%). Other reason for not using the city centre in the evening were safety concerns (18%) and age or health reasons (13%).

5.8. Sunday visits and improvements to Coventry City Centre

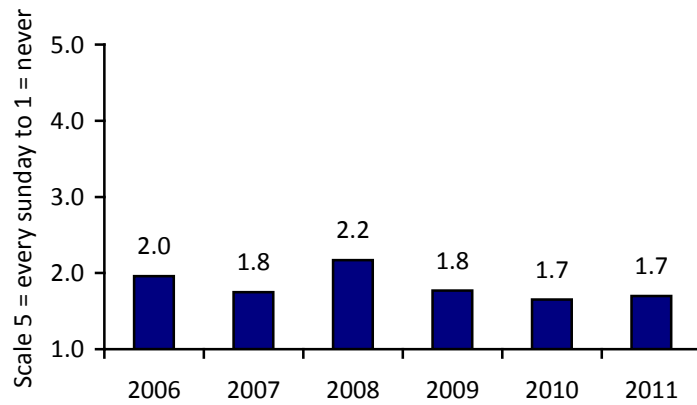
This section posed questions on frequency of Sunday visits to Coventry City Centre. Respondents were then able to make suggestions for future improvements to the city centre.

Figure 8.1: Frequency of trips to Coventry City Centre on a Sunday



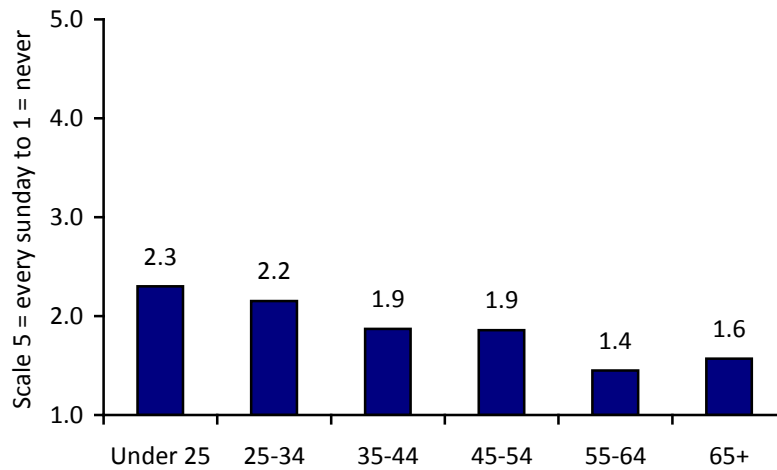
39% of respondents stated that they visited Coventry City Centre on a Sunday. The majority of users said that they visited less than once a month (20%).

Figure 8.2: Average frequency of trips to Coventry City Centre on a Sunday



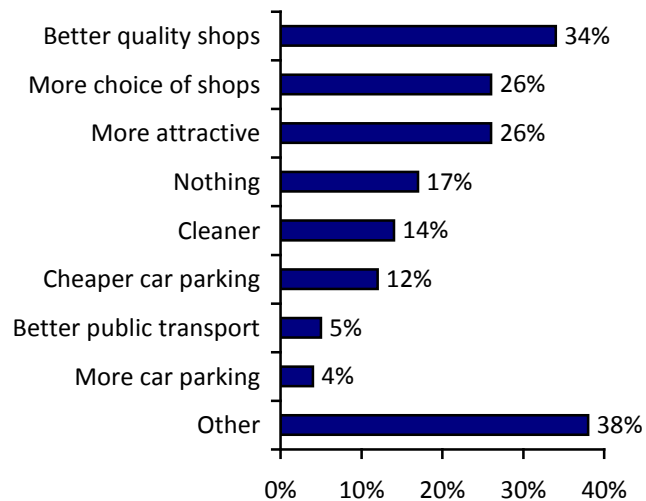
The average frequency of Sunday visits over the past 5 years (using a scale of 5 = every Sunday and 1 = never) was seen to slightly fluctuate between 1.7 and 2.2 (where 2 is equal to less often than once a month).

Figure 8.3: Average frequency of trips to Coventry City Centre on a Sunday against age



Frequency of Sunday visits cross-tabulated against age profile shows that younger age groups are inclined to visit the city centre more often on a Sunday.

Figure 8.4: What would you change to improve Coventry City Centre



When asked what improvements respondents would like to see made to the city centre, better quality shops (34%), more choice of shops (26%) and made more attractive (26%) were the most common suggestions. 17% of respondents said there was nothing that they would change to improve Coventry City Centre.

5.9. Perceptions of Safety

Respondents were asked to comment on their feelings of safety in Coventry City Centre. This section also identified factors that have a positive or negative impact on perceptions of safety, and the degree to which perceptions relate specifically to Coventry.

Figure 9.1: Feeling of safety during day and evening

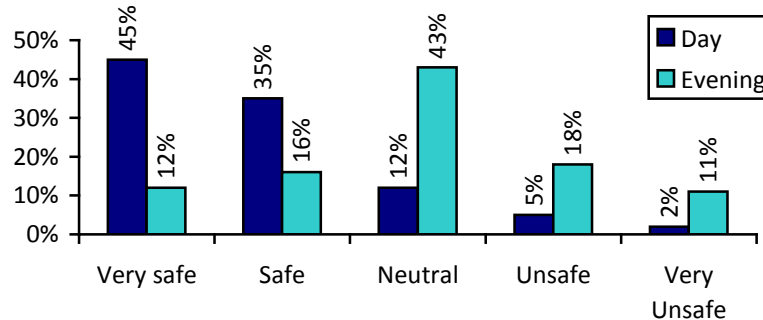
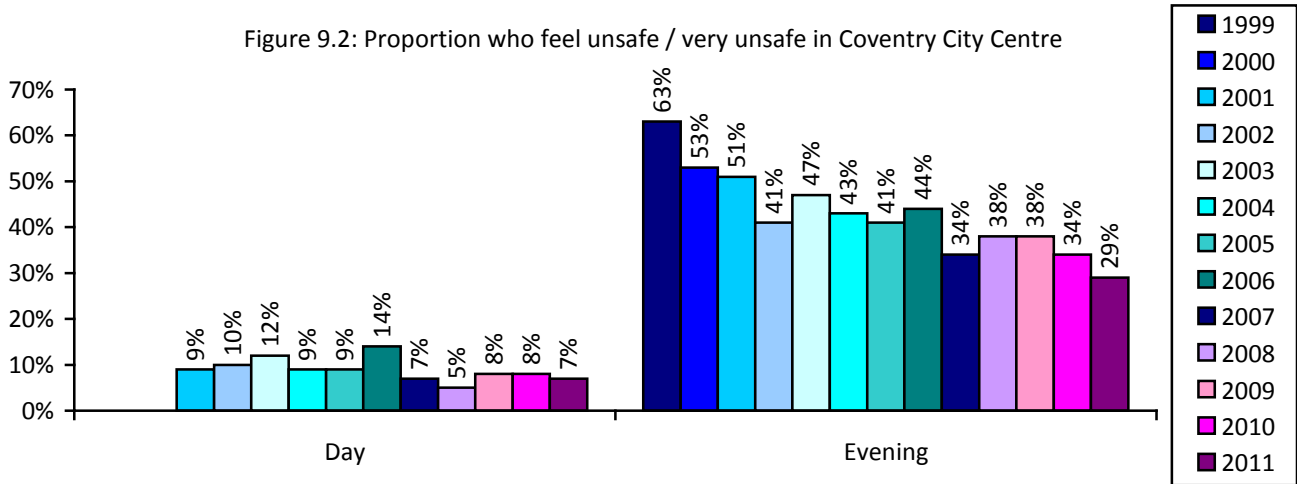


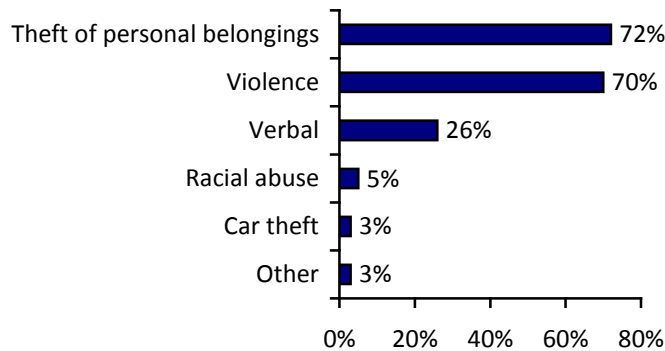
Figure 9.1 shows respondents' feelings of safety during the day and at night. Obviously there is a clear difference between daytime and evening safety perceptions with only 7% of respondents feeling unsafe or very unsafe during the day, compared to 29% during the evening.

Figure 9.2: Proportion who feel unsafe / very unsafe in Coventry City Centre



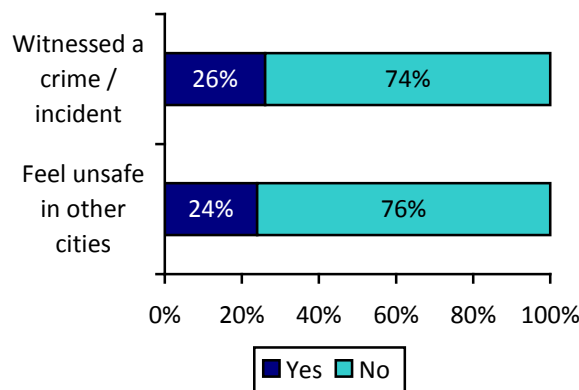
Time analysis of evening safety concerns within the city centre show the proportion who feel unsafe has more than halved since the survey began in 1999. The small proportion of respondents feeling unsafe during the daytime has remained relatively low during this time. Additional analysis showed that older age groups were slightly more likely to feel unsafe in both the day and evening (10% and 32% of respondents aged over 65 felt unsafe during the day and evening respectively compared to 2% and 20% of those under 25).

Figure 9.3: Type of threat making respondents feel unsafe



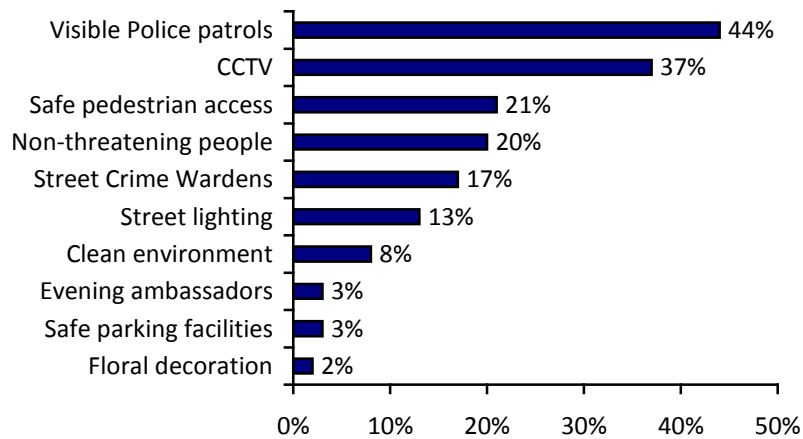
In general, the main reasons for visitors' perceptions of the city centre as unsafe were because they feared theft of personal belongings (72%) and violence (70%).

Figure 9.4: Aspects of feeling unsafe



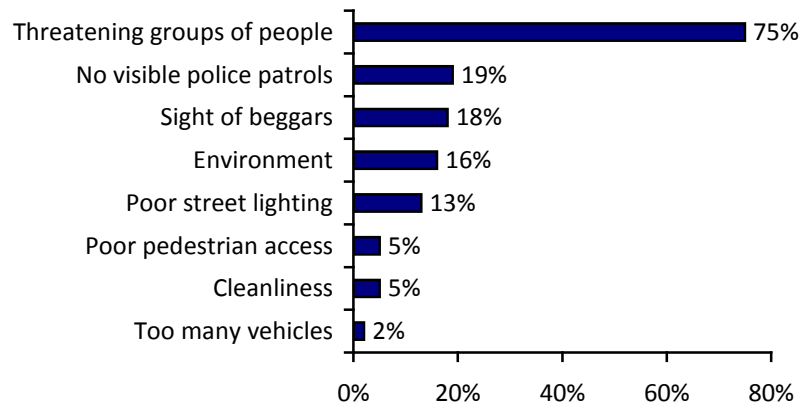
26% of those who reported feeling unsafe in the city centre stated that they had witnessed a crime, which may have influenced their perceptions. 24% of all respondents stated that they felt unsafe in other towns and cities.

Figure 9.5: Visible aspects that add to feelings of safety



Two key visible aspects which respondents said increased their feelings of safety were visible police patrols and CCTV, with 44% and 37% of respondents respectively. Other notable aspects were safe pedestrian access (21%), non-threatening people (20%), street crime wardens (17%) and street lighting (13%).

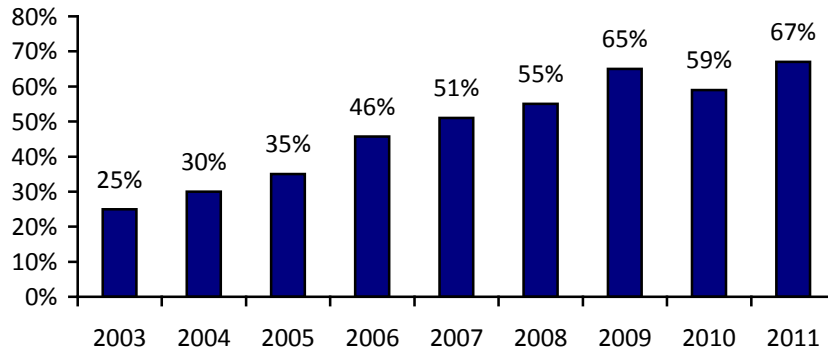
Figure 9.6: Visible aspects that make respondents feel unsafe



The main aspect responsible for increasing visitors' feelings of being unsafe was the presence of threatening groups of people (75%). Further analysis showed the negative influence of threatening groups was felt across all age groups.

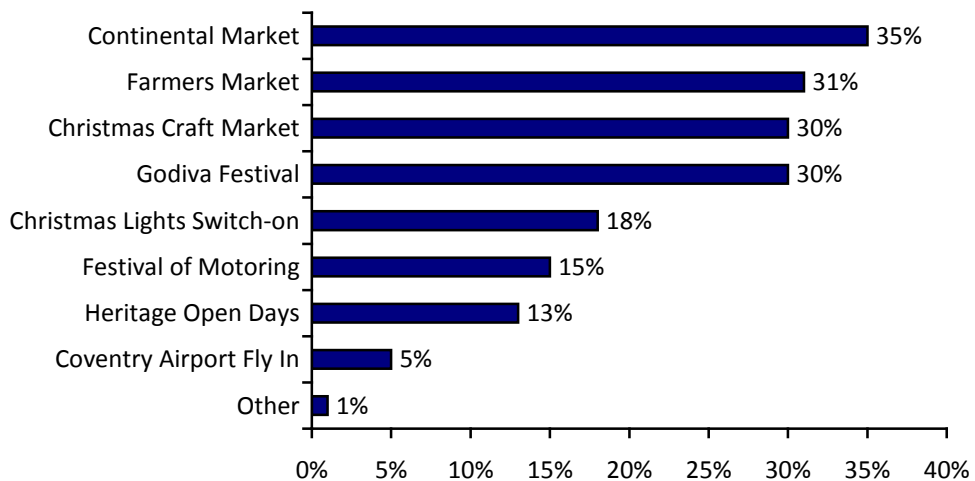
5.10. Events

Figure 10.1: Attended at least one CV One event



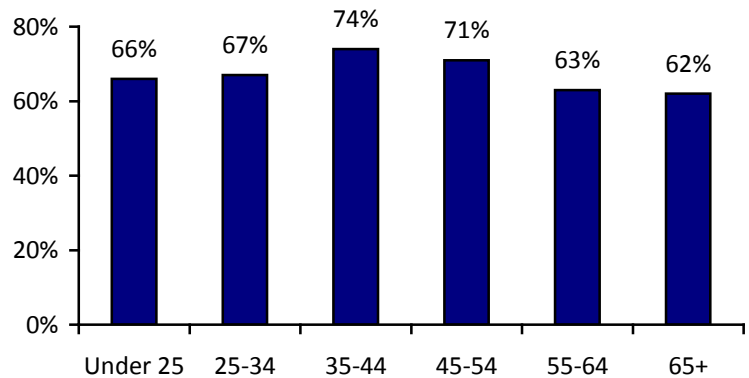
Overall event attendance showed that 67% of respondents had attended at least one CV One organised event in the past 12 months. Despite a continued reduced offer, this result was up from 59% in 2010.

Figure 10.2: CV One event attendance



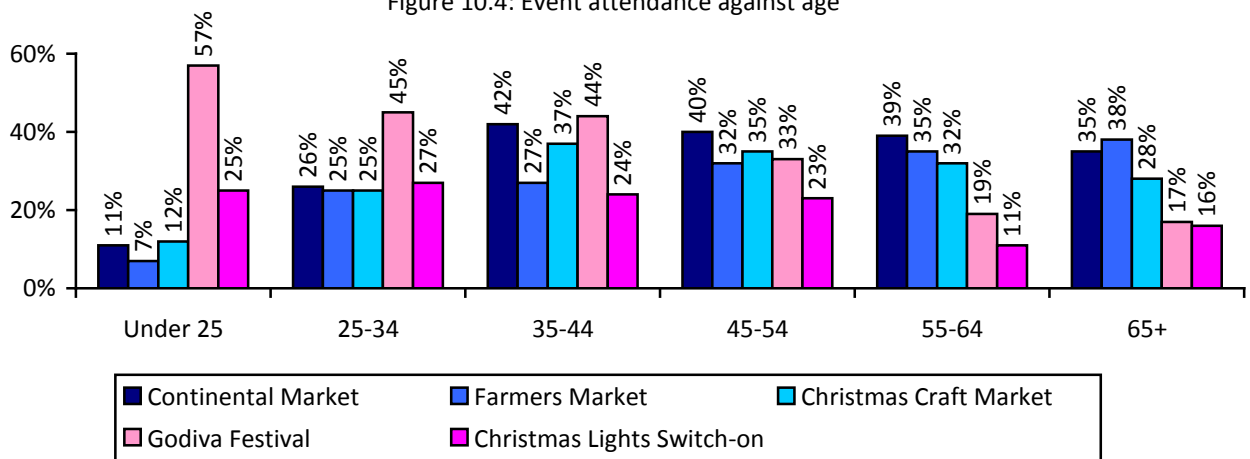
Markets proved to be the major draw. 35% of respondents had attended a Continental market (compared to 24% in 2010), 31% had visited one of the monthly Farmers' Markets (26% in 2010) and the Christmas craft market had attracted 30% (34% in 2010). The popularity of the Godiva Festival continues with 30% indicating that they had been to the 2011 festival.

Figure 10.3: Attended at least one event against age



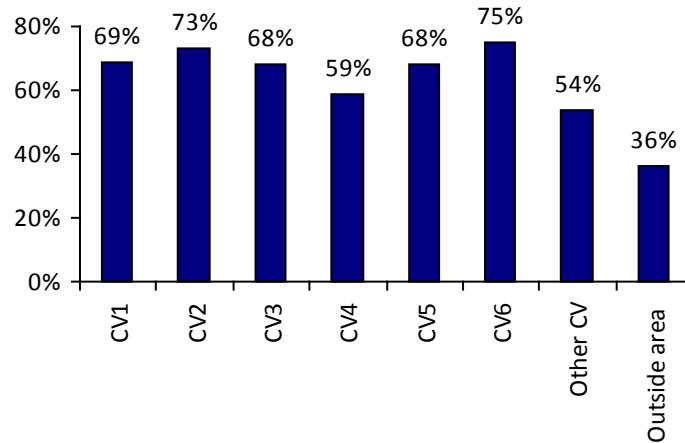
Events attracted all ages; those aged 65 years or over showed lowest levels of attendance but nevertheless 62% of this age group had attended at least one event in the past 12 months.

Figure 10.4: Event attendance against age



Further analysis of this data showed patterns similar to previous years, namely that the Godiva Festival and Christmas Lights Switch On were more attractive to younger visitors, whereas the various specialist markets proved a draw for older age groups.

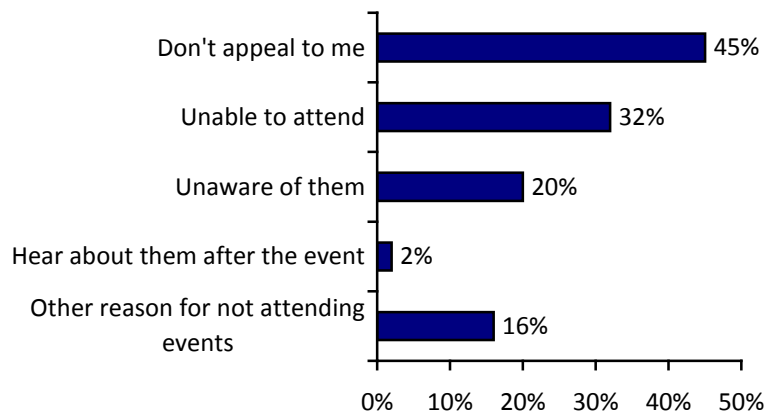
Figure 10.5: Attended a least one event against postcode



Looking at event attendance against respondent postcode showed, once again, that events attracted visitors not only from the city but also from across Warwickshire (54%) and even further afield (36%).

A total of 31% of those respondents who had attended a CV One event stated that they had visited the city centre more often as a result of event attendance. This underlines the importance of city centre events to changing visitor perceptions of the city and increasing footfall.

Figure 10.6: If not attended, why not

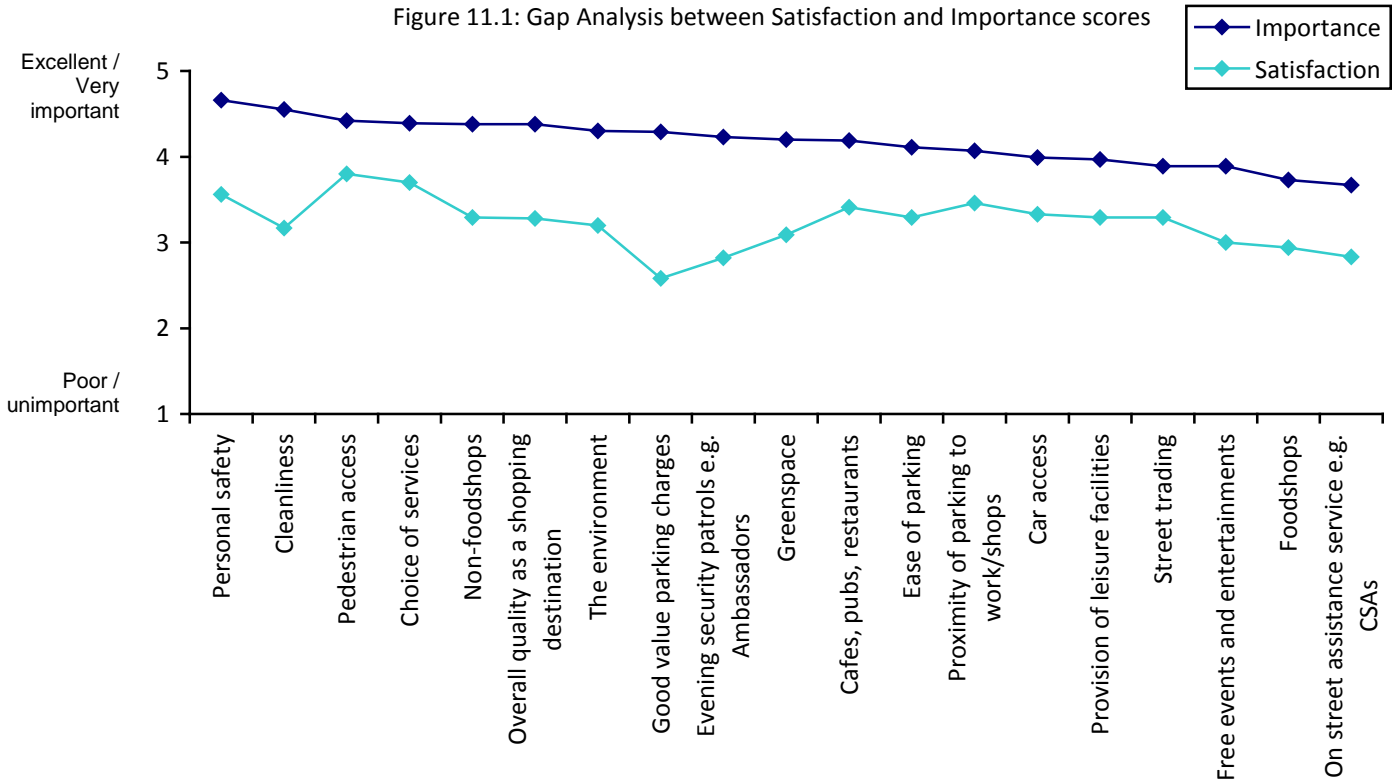


Non-attendees, asked to expand on why they did not attend, reiterated the same top three main reasons as given in 2010. Events did not appeal to 45% of non-attendees, 32% were unable to attend and 20% said that they were unaware of events.

5.11. Perceptions of Coventry City Centre

This section sought to ascertain stronger and weaker areas of service provision within Coventry City Centre, by comparing responses to questions on expectations and satisfaction and then evaluating the disparity between the two.

Figure 11.1: Gap Analysis between Satisfaction and Importance scores



This year's results, in line with previous years, showed that respondents placed the highest levels of importance on personal safety and cleanliness. Although these areas have acceptable levels of satisfaction, due to high levels of importance placed upon them they are both areas with some of the largest variance between importance and satisfaction. Good value parking charges and evening security patrols, due to very low levels of satisfaction and medium levels of importance have the largest disparity between importance and satisfaction of all city centre attributes.

Figure 11.2: Strong areas of provision and areas requiring attention:

	Very Unsatisfactory	Unsatisfactory	OK	Satisfactory	Very Satisfactory	
Very Important	E	D Good value parking charges	C The environment, Cleanliness, Greenspace, Evening security patrols	B Choice of services, Personal safety, Proximity of parking, Cafes, pubs, restaurants, Non-foodshops, Ease of parking, Overall quality as a shopping destination	A Pedestrian access	5
Important	e	D	c Free events and entertainments, Foodshops, On street assistance service	b Car access, Provision of leisure facilities, Street trading	a	4
Not so important	(e)	(d)	(c)	(b)	(a)	3
	1	2.25	2.75	3.25	3.75	5

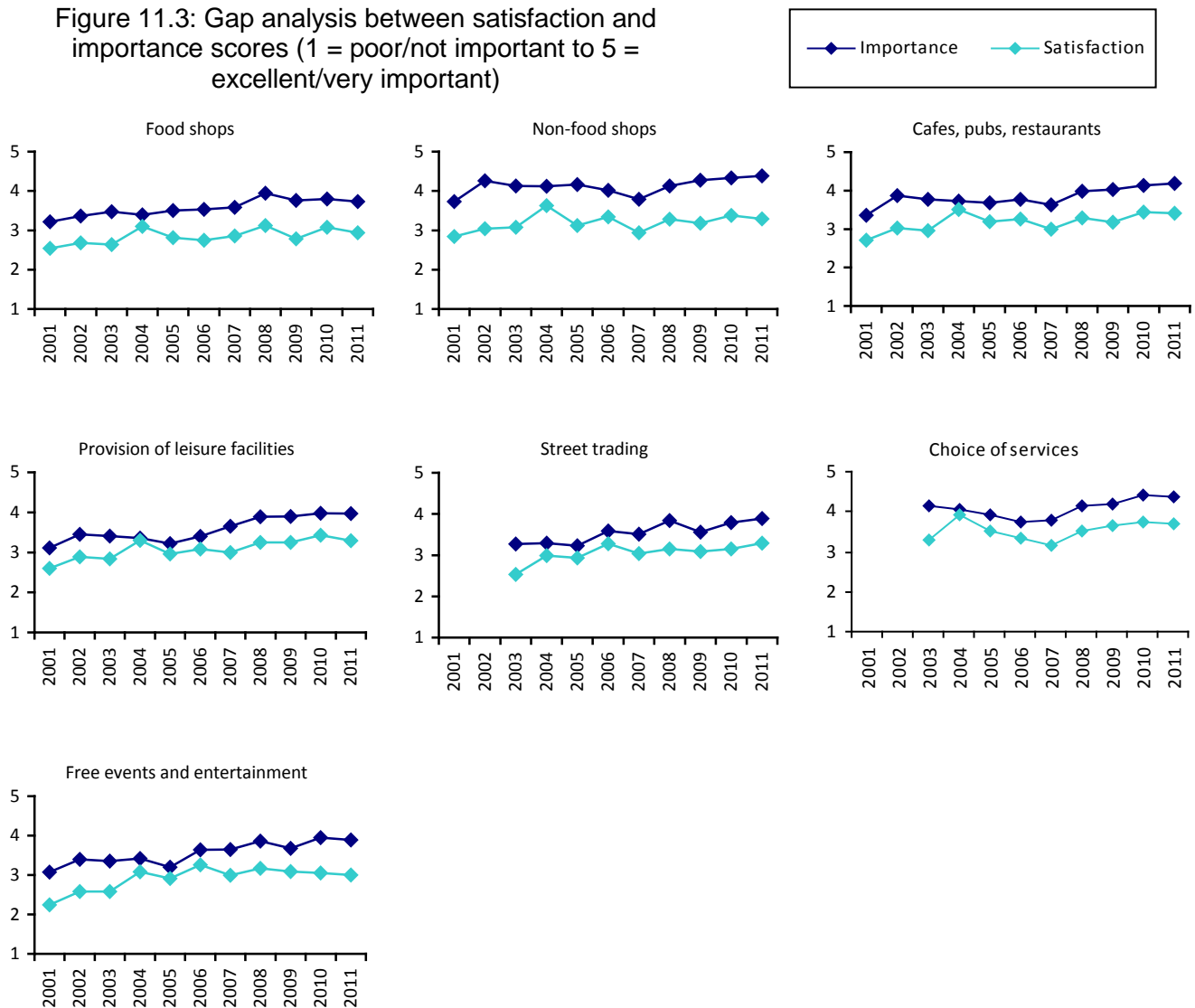
N.B. For a discussion on this method of interpretation, please see appendix 1.

Gap analysis highlights what aspects of the city centre people hold to be important and those that most need improving. Table 11.2 highlights the poor performance of good value parking charges, being seen as very important to respondents but being rated unsatisfactory in terms of performance (score below 2.75, on a scale of 1 being poor to 5 being excellent).

The following results show analysis over time of the gap between the level of satisfaction and importance placed on areas of service provision within Coventry City Centre.

5.11.1. City Centre Offer

Figure 11.3: Gap analysis between satisfaction and importance scores (1 = poor/not important to 5 = excellent/very important)

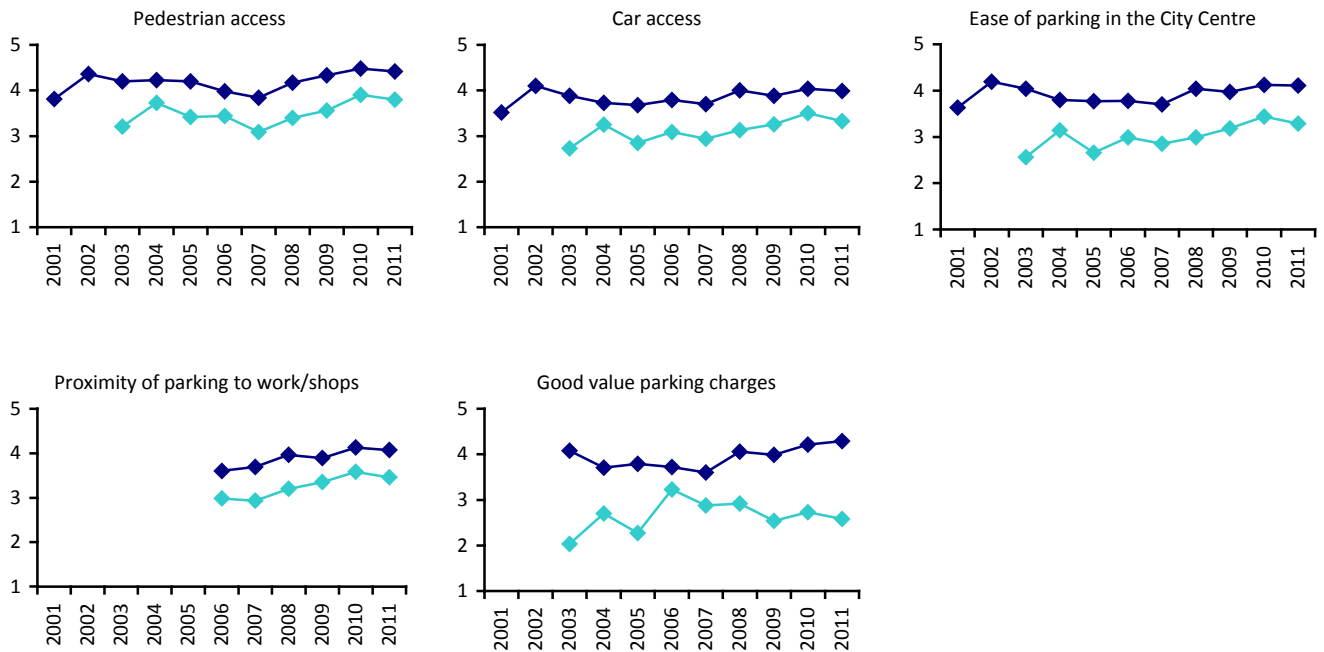


Satisfaction with food shops, non-food shops and cafes/pubs/restaurants provision within the city centre had fallen slightly over the last year, although having generally seen very little change in satisfaction levels since 2005. Since 2007 the level of importance respondents place on non-food shopping and cafes/pubs/restaurants has increased, whereas the level of importance placed on food shops has fallen (currently the second lowest level of importance). This indicates that few respondents believe the food shopping offer has an important role in creating an attractive city centre and also maybe underlining the influence of out-of-town retailers. Within the city centre offer, non-food shopping displays the largest disparity between satisfaction and importance.

Provision of leisure facilities, street trading and choice of services are areas which have lower variance between satisfaction and importance, although choice of services is seen to play a key role within the city centre (factor with 4th highest importance of all services and the highest importance of city centre offer measures). Free events and entertainment within the city centre have been affected by funding cuts and fewer events have been staged, so it is no surprise to see a fall in satisfaction in this area when tracked against previous years.

5.11.2. City Centre Access

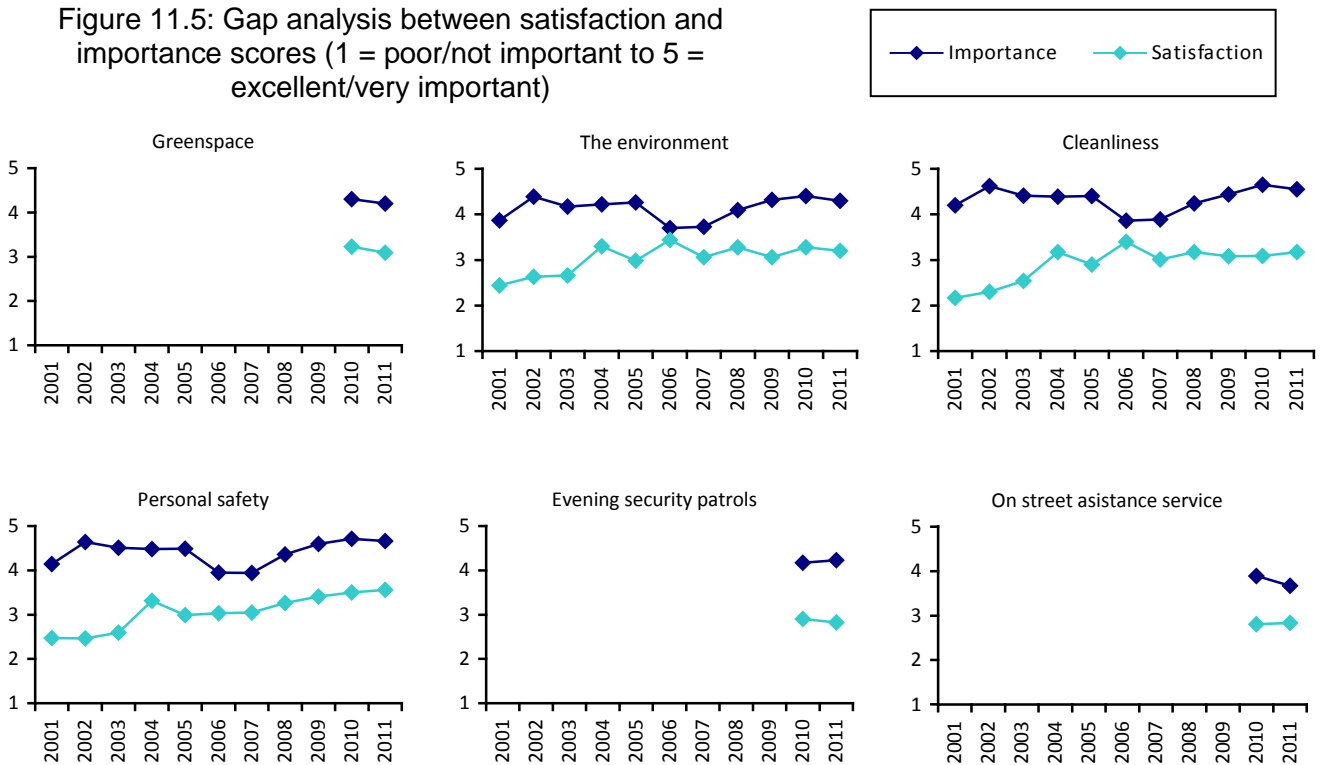
Figure 11.4: Gap analysis between satisfaction and importance scores (1 = poor/not important to 5 = excellent/very important)



Pedestrian and car access, ease of parking and proximity of parking to work/shops within the city centre have shown similar trends over time, seeing a general increase in satisfaction and importance since 2005-2006, but showing a small fall over the past year. Good value car parking, on the other hand, is a contentious service type; a number of tariff increases over the past years have been reflected in falling satisfaction levels, resulting in this aspect having the lowest satisfaction level of all city centre service types and the largest variance between satisfaction and importance.

5.11.3. City Centre Environment and Safety

Figure 11.5: Gap analysis between satisfaction and importance scores (1 = poor/not important to 5 = excellent/very important)



The city centre environment, cleanliness and personal safety are areas of provision within the city centre which have historically seen a large gap between importance and satisfaction, despite personal safety having high satisfaction levels and cleanliness and the environment having midrange satisfaction levels in comparison with other attributes. The main reason for the large disparity is the extremely high levels of importance placed upon these attributes in contributing to an attractive city centre (personal safety 1st, cleanliness 2nd and the environment 7th in terms of importance). Rating of greenspace, evening security patrols and on-street assistance are new additions to the survey, all displaying large disparities between importance and satisfaction.

5.11.4. City Centre Overall Quality

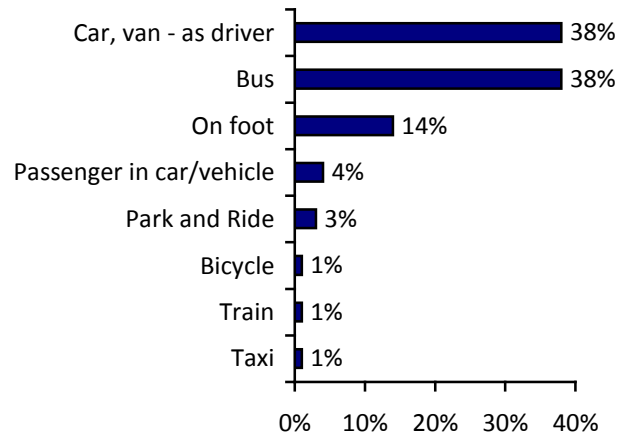


Since 2006, and following a dip from 2005, respondents have continued to place more importance on the need for the city centre to be a high quality shopping destination (although there was a slight reduction over the last year). During this time, there has been very little improvement in levels of satisfaction with this aspect.

5.12. Travel and Car Parking Perceptions

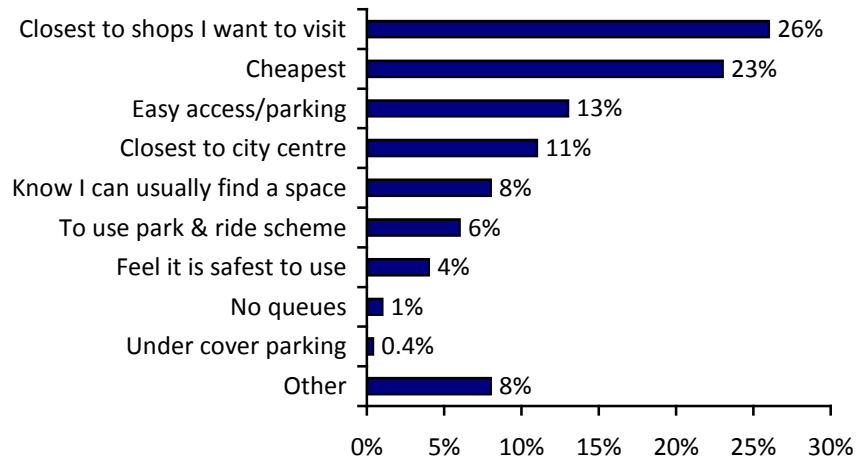
This section investigated patterns in travel. Respondents who mostly travel by car were asked about what influences choice of car parking in the city centre.

Figure 12.1: Mode of travel used to visit Coventry City Centre



Travel by car (38% as driver, 4% as a passenger) and by bus (38%) were by far the most popular modes of transport used to get into the city centre. 14% said that they typically travelled in on foot. All these results reflected 2010 findings.

Figure 12.2: Main influence on where to park



The main influence on where motorists parked when travelling to the city centre by car was revealed to be choosing a car park because of proximity to shops the respondent intended to visit (26%). Other reasons given were cheapest (23%), easy to access/park in (13%) or closest to the city centre (11%).

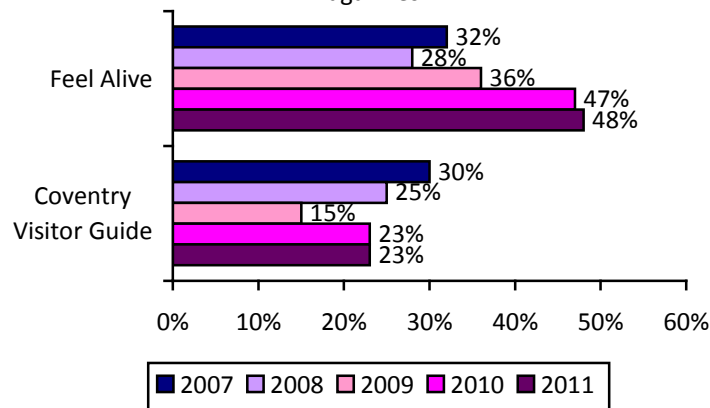
5.13. Marketing

Questions posed in this section sought to determine levels of awareness of, and interest in, Feel Alive magazine and the Coventry Visitor Guide.

Feel Alive is a lifestyle magazine published three times a year (Spring / Summer, Autumn and Winter editions). 100,000 copies are printed each edition (distribution was cut from 150,000 copies last year) and delivered in Coventry (the magazine now selectively targets fewer households in Coventry), Warwick, Stratford, Leamington, Rugby, Nuneaton and Bedworth. A small number are also distributed in each of the three main shopping centres, Coventry Market and Coventry Tourist Information Centre (TIC).

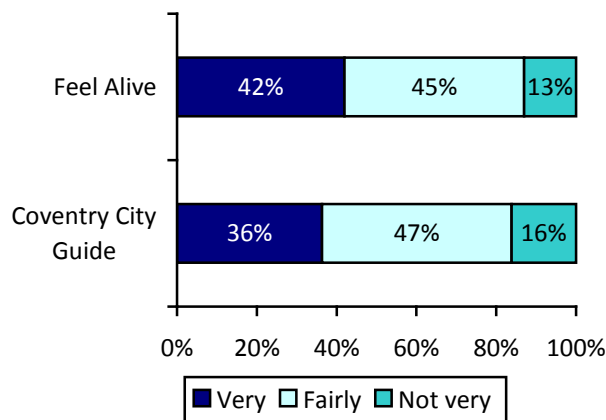
A total of 10,000 Coventry Visitor Guides have been printed over the past year. 4,000 of these were sent to Take One Media to distribute throughout the UK and the rest are distributed via the Tourist Information Centre (TIC), airports, surgeries, shops and other requests.

Figure 13.1: Have you seen any of the following magazines



Awareness of the Feel Alive magazine rose for a third successive year (despite the decrease in distribution) with 48% of respondents having seen a copy. With a smaller print run and a target audience of visitors from outside Coventry and Warwickshire lower awareness of the Coventry Visitor Guide is to be expected; 23% of those surveyed were aware of this publication, matching 2010 results.

Figure 13.2: How interesting did you find...



The majority of Feel Alive readers said that the magazine was fairly interesting (45%), followed by 42% who thought it was very interesting. The latter result has risen from 29% in the 2010 survey. 47% of Visitor Guide readers found it fairly interesting while 36% found it very interesting.

6. Conclusions and Strategic Objectives

Key city centre performance indicators from the survey show the continued negative effects of the recession, with frequency of visits, average spend, proportion of those who used Coventry City Centre as their main shopping centre and evening usage all having fallen annually since the recession hit. The survey also shows that the pinch is not only being felt in Coventry City Centre but also across other competitor centres, with fewer residents from Coventry and surrounding areas visiting the city centre's competitors, Solihull, Leamington and Birmingham.

Coventry performance data, in common with the UK picture, suggest any positive signs at the end of 2010 seem not to have resulted in any real recovery from the recession; city centre footfall for 2010 was up 1.9% year-on-year, yet the position for first 35 weeks of 2011 is 2.6% down. The number of void units within the city centre has been slightly more encouraging, currently at the lowest level since 2007 (44 void units at the end of September 2011) and similar to the national average (11.1% nationally compared to 11.3% in Coventry, ATCM).

Despite this, those city centre attributes which are less influenced by market forces are seen to have improved over the past year, with visitors feeling safer during both the day and evening, satisfaction levels with cleansing within the city centre continuing to improve, event attendance being at its highest level on record and more people having seen the Feel Alive magazine.

Despite the economy growing more strongly than expected in the third quarter of 2011 (up 0.5%, ONS), post-recession growth is slow, with economists of mixed opinion as to what is in store for the UK economy over the next 12 months. There are those that believe there is a significant chance it will contract and is heading towards a double-dip recession. Those who believe the UK economy will not return to recession suggest that, nevertheless, there will be no meaningful growth, with the UK a long way off those levels seen prior to 2008/09. The general consensus is that any growth in 2012 will be slow and recovery will continue to be slower than any other recession seen in the UK.

With investment continuing to be in the doldrums and, as a result, any major city centre redevelopment failing to gather momentum, the city centre will rely on smaller pockets of development to stimulate any change in shopper patterns and meet the needs of a city the size of Coventry. Current management of city centre factors which can be influenced appears positive and this has been reflected in visitor perceptions. However the city centre, in common with the UK high street as a whole, continues to be at the mercy of low consumer confidence and slow economic recovery.

7. Appendix 1

Methodology used to interpret Satisfaction and Importance perceptions

The grid below illustrates the model for interpretation used in this report to analyse and categorise perceptions of satisfaction and importance towards a range of service areas provided with the City Centre.

This method of interpreting satisfaction and importance data was developed at the University of Central England, originally designed for analysing satisfaction in the education sector, and consequently this system of interpretation is referred to as the 'Student Satisfaction Manual'. This method has since been developed and is widely used across a variety of business sectors to interpret evaluative information obtained via the Likert scale method.

Method for Categorisation according to Importance and Satisfaction rating scores:

	Very Unsatisfactory	Unsatisfactory	OK	Satisfactory	Very Satisfactory	
Very Important	E	D	C	B	A	5
Important	e	d	c	b	a	4
Not so important	(e)	(d)	(c)	(b)	(a)	3
	1	2.25	2.75	3.25	3.75	5

The method operates by asking respondents to rate a variety of factors in terms of their satisfaction with them, and the importance they place on each factor. Ratings are made on a five point Likert scale, where 1 is poor and 5 is excellent. For each area of service that is evaluated, a mean average score out of 5 is calculated from the total number of responses for both satisfaction and importance.

The two average scores are then plotted on the above chart where satisfaction is plotted along the x axis and importance along the y axis as shown. The point at which the two scores meet denotes the categorisation of each service area into one of the 15 boxes in the grid.

Letters range from A to E, where a capital letter means the factor is very important, a lower case letter indicates the factor is important and a lower case letter in parentheses denotes the factor is not so important. Capital letters A, D and E are highlighted as they indicate the most important areas for consideration. 'A' indicates high satisfaction and high importance, and therefore it is crucial to maintain the high standards achieved in areas that are categorised in this section. 'D' and 'E' indicate a high level of importance, combined with a low level of satisfaction, therefore highlighting that improvement is required with some urgency, for any areas that fall into this section.

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