Chief Executive's Directorate; Corporate Research

Coventry City Centre Survey 2013

Corporate Research

February 2014

Coventry City Council

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1. Executive Summary

The City Centre Business Improvement District (BID) team in Coventry City Council commissions a biennial city centre survey to find out what local people, both Coventry residents and those living in surrounding areas, think of the city centre. The survey was previously conducted on an annual basis but is now taking place every two years. Information is collected from face-to-face interviews with the public in the city centre (city centre users), via a telephone survey (collecting the views of both users and non-users in the city centre's catchment area) and via an online survey. Results date back to 1999, providing information which enables the council to track city centre visitor patterns, public perceptions and the impact of promotional tools.

The results of the 2013 survey showed some improvement in the average spend per visit, suggesting effects of the recession may at last be easing. However, in common with the findings of the previous survey in 2011, average frequency of visits and proportion of the sample using Coventry City Centre as their main shopping centre both declined.

Although choice/range of shops remained the prime reason why people said they choose other destinations over Coventry for non-food shopping, rising costs were evidently on people's minds in the 2013 survey with free or cheaper parking at other destinations emerging as a major influence.

Coventry's out-of-town retail offer continues to present challenges to the city centre; there was a 14% increase in the number of people stating that out-of-town shopping had reduced their use of the city centre to some degree since the 2011 survey and the proportion of the sample who said they used any of Coventry's out-of-town retail areas has increased. The new Warwickshire Shopping Park, recently opened at Binley at the time of the survey, was already proving popular, with 11% of respondents indicating that they shopped there.

More encouragingly, the proportion of respondents who said they visited the city centre in the evening has increased since the last survey (from 38% in 2011 to 46% in 2013). 40% of people surveyed indicated that they would be encouraged to visit Coventry City Centre in the evening if shops were open later.

The development of Broadgate has taken place since the 2011 survey and 59% of the sample were in agreement that development works have improved the city centre. A worrying finding from this year's survey, however, was a sharp increase in those reporting that they feel unsafe in the city centre in the evening (56% in the 2013 compared to 29% in 2011). The presence of groups of people perceived as threatening continues to be the aspect most likely to have a negative impact on how safe people feel.

Events play a key role in promoting the city centre and over half of respondents said they had visited at least one city centre event in the last 12 months (57%). Although this was a lower result than in 2011, a greater percentage of 2013 attendees stated that visiting an event had increased their use of the city centre.

Findings from the perception analysis highlight people's continued dissatisfaction with parking charges in the city centre and concerns about the availability of on street assistance/ security patrols. People's expectations are generally being met in terms of the choice of services available in the city centre.

2. Introduction

The survey is designed to focus on areas of service provided to BID levy payers by Coventry's City Centre BID. Each year an extensive survey of Coventry residents and those living in nearby areas is carried out to provide a range of management information including patterns of visits to the city centre, perceptions of the city centre environment, evaluation of services provided and perceptions of safety.

3. Research Aims and Objectives

The core service areas of the BID are crime reduction, cleansing/ greening and marketing of the city centre to encourage footfall and inward investment. The aim of the 2013 research was to provide information to the BID, relating to some of these service areas, to feedback to its members and the objectives were to provide information on the following areas:

1. 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.

2. 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.

3. Out of Town competition – to gather information on the impact on the city centre of Coventry's out-of-town offer.

4. City Centre improvement – to find out how people think Coventry City Centre could be improved and to gauge public reaction to improvement work already undertaken.

5. Evening Visits - 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. Also to explore public reaction to the possibility of shops staying open later.

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 negative influences on safety perceptions

7. Events - to determine levels of attendance at city centre events run by the city council.

8. Perceptions of Coventry City Centre - to evaluate stronger and weaker areas of service provision via questions concerning public satisfaction and expectations.

9. Demographic Profile - to assemble a respondent profile including age, gender, postcode, occupation, adults and children in household and car ownership

4. Methodology

The annual survey consists of three parts, on-street interviews, a telephone survey and, for the first time in 2013, an online survey. Data from all 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 data sets also helps in preventing skewed results (e.g. for postcode, age and gender) that have often been inherently displayed by the different 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 2013 face-to-face interviewing was carried out during August 2013 between 10a.m. and 2p.m. (to cover the busy lunchtime period) on weekdays and Saturdays. Interviews were carried out around Broadgate and Upper Precinct in the city centre.

430 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 from Monday 29th July to Friday 9th August 2013, conducted at different times during the week/weekend and daytime/evening to ensure demographic range and diversity.

850 questionnaires were completed via telephone.

iii) Online survey: The questionnaire was available to complete online via SurveyMonkey. A link to the survey was featured on the Coventry City Council website, advertised on the council's Facebook page and also sent out by email to members the Corporate Research Team's contact database (local residents who have expressed an interest in taking part in council surveys and consultations).

380 responses were received online, 200 from contact database members and 180 from other online respondents.

In all formats, the same questionnaire was employed (with the exception of some additional questions at the beginning of the street version regarding the respondent's reason for visiting on the day of the survey).

The 1,660 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 whole[1]. The demographic profile of the 2013 sample is detailed in appendix 1.

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 England[2] 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 given in appendix 2.

A copy of the questionnaire is available on request.

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[1] *At the 95% confidence level, a sample size of 1,660 from a total population of 323,100 equates to a margin of error that is plus or minus 2.4% i.e. a figure of 50% can be said to lie within a range no wider than 47.6% and 52.4%.*

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

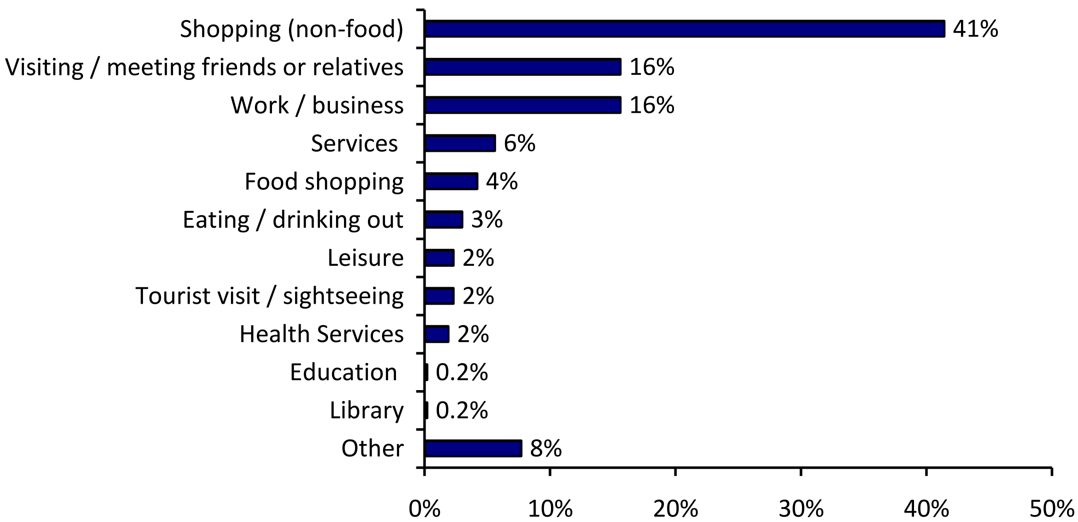
5. Data Analysis and Results

5.1. 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 or online respondents therefore the sample size for this section is 430. Question areas included reasons for coming to the city centre and intended shopping destinations during the visit.

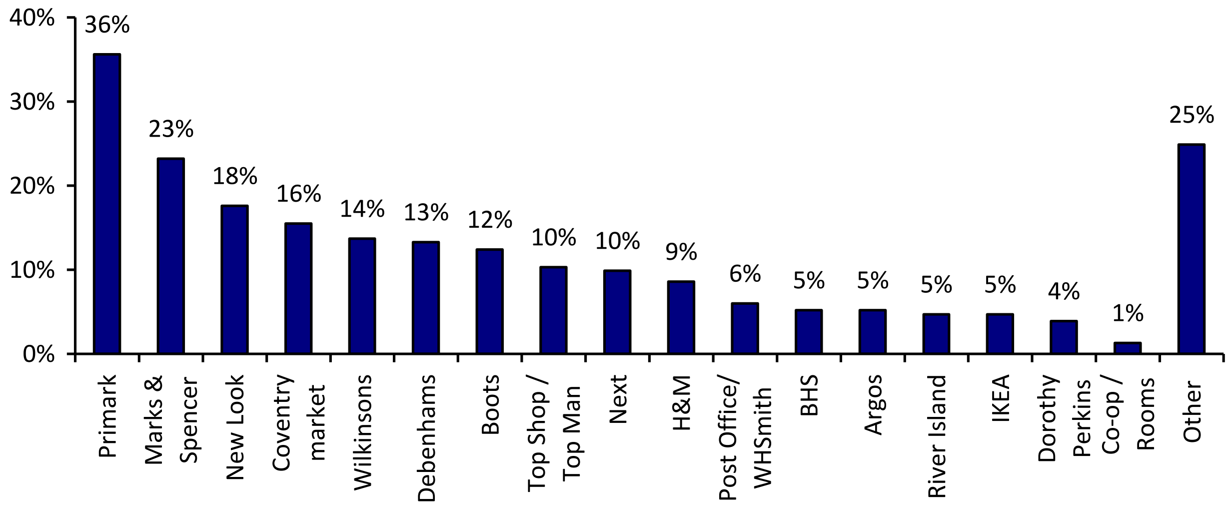
As has proved the case in past surveys, respondents most commonly cited non-food shopping as their main reason for visiting Coventry City Centre on the day they were surveyed (41%). 16% of the sample were visiting for work or business and the same proportion said they were visiting or meeting up with friends/ family. Of the 54% who said that they were visiting the city centre primarily for a reason other than shopping, nearly two thirds (62%) said they would also be doing some form of shopping during their visit.

Figure 1.1: Main reason for visiting Coventry City Centre



69% of those respondents who were shopping said that they intended to visit a specific store. Figure 1.2 gives a full breakdown of stores they intended to visit, showing that Primark and Marks & Spencer were the most popular locations (36% and 23% respectively).

Figure 1.2: Intended store visits whilst in Coventry City Centre



5.2. 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.

42% of respondents were classified as frequent users, visiting the city centre once a week or more often for shopping. 37% of respondents were classified as medium users, with a visit pattern of less often than weekly but at least once every two months. The remaining respondents were those who visit infrequently (less often than once every couple of months, 16%) and those who never visit the city centre for shopping (5%).

Figure 2.1: Frequency of trips to Coventry City Centre mainly for shopping

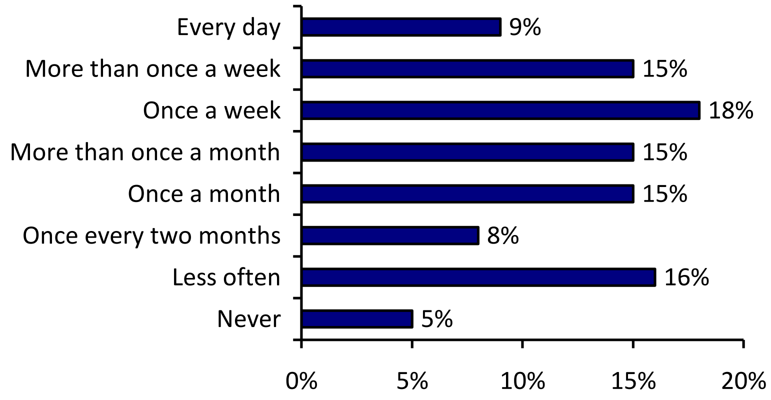
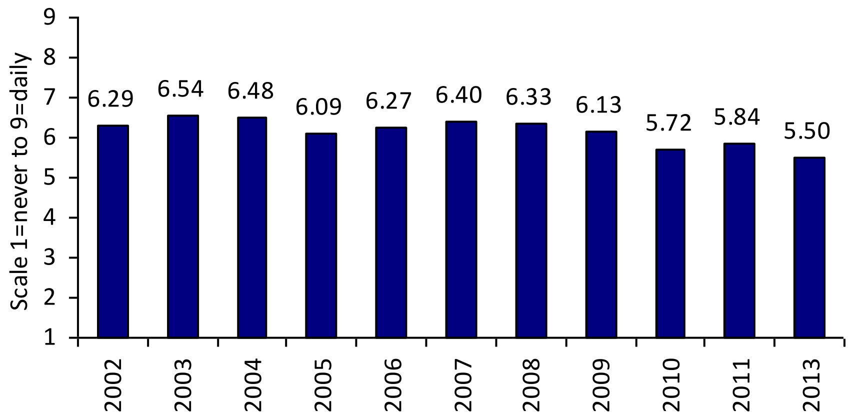


Figure 2.2 shows the trend analysis of average frequency of visits to the city centre (on a scale of 1 being never and 9 being daily). Frequency of city centre visits for shopping has continued to fall below an average of 6 since 2009, suggesting negative effects of the recession on visitor patterns.

Figure 2.2: Average frequency of trips to Coventry City Centre mainly for shopping - trend



In common with past surveys, the highest proportions of frequent use of the city centre for shopping were demonstrated amongst those likely to have more free time during the week in which to visit. In terms of age group, people aged 65 and over were more likely to be frequent users and in terms of employment status, people who were unemployed/ job seeking or retired were most likely to be a frequent user (fig.2.3).

Figure 2.3: Frequency of use by age and employment status

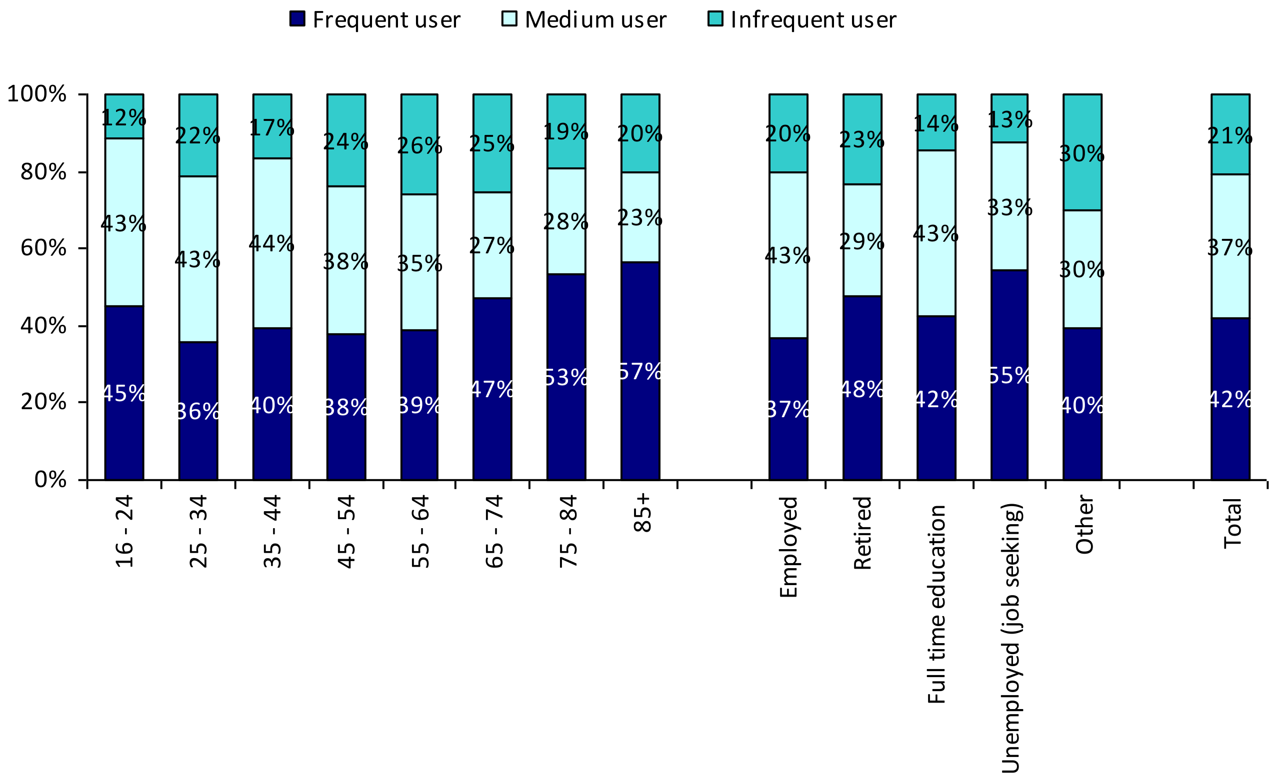
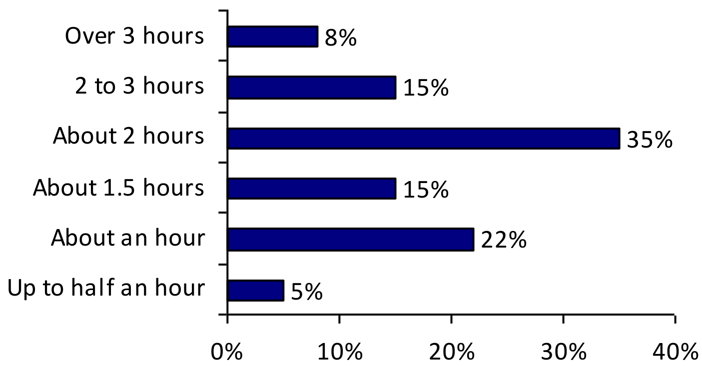


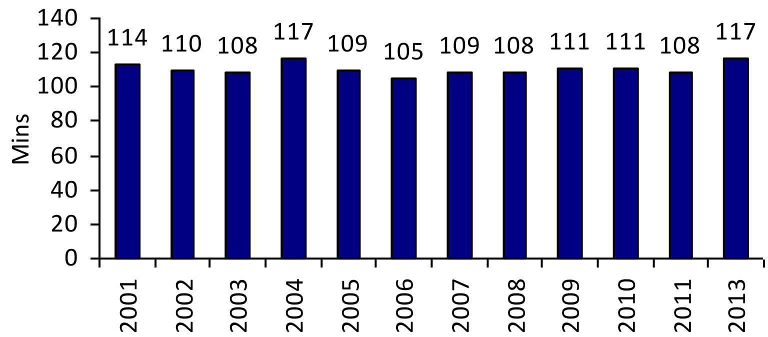
Figure 2.4 shows how long shoppers said they generally spend in the city centre per visit. This illustrates that the most common length of visit was about two hours (35%), 23% spend over two hours in the city centre on a typical trip and 27% tend to spend one hour or less per visit.

Figure 2.4: Typical length of time spent shopping in the city centre per visit



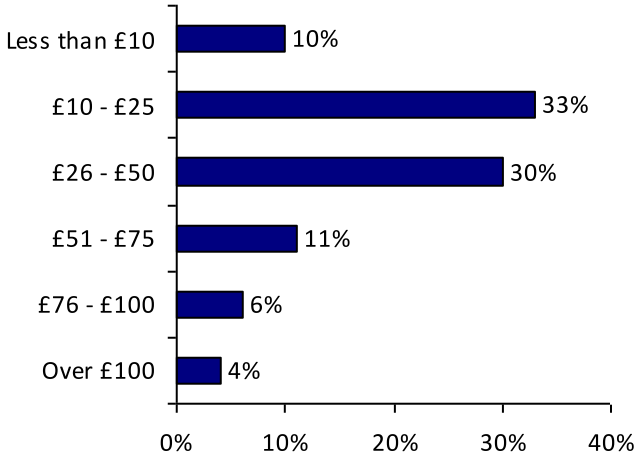
The mean duration of visit was calculated and respondents reported spending 117 minutes in the city centre on a typical shopping trip. This figure is the highest mean amount of time spent in the city centre since the 2004 survey result.

Figure 2.5: Average length of time spent shopping in the city centre per visit - trend



Asked for the amount they spent on a typical shopping trip in Coventry City Centre, respondents who shop there most commonly reported spending between £10 and £25 (33%) or between £26 and £50 (30%) per trip.

Figure 2.6: Typical spend per visit



The mean reported spend per head in 2013 on a typical trip was £36.42. This was an increase of £4.61 in the average amount spent per visit compared to 2011 and the first time we have seen an average amount of more than £35 since 2009.

Figure 2.7: Average spend per visit - trend

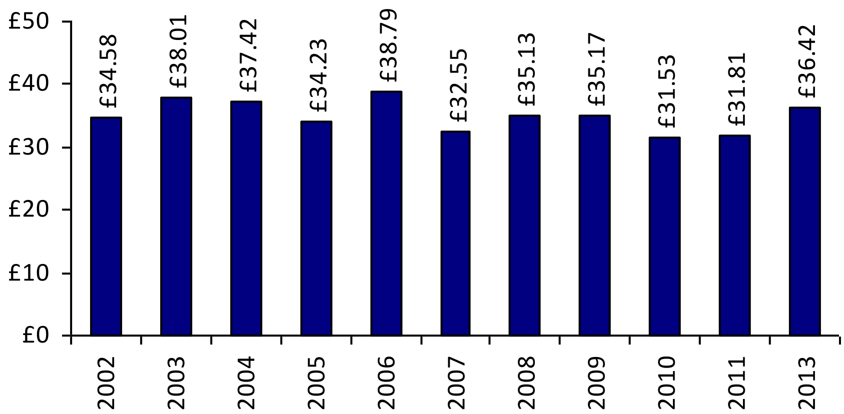
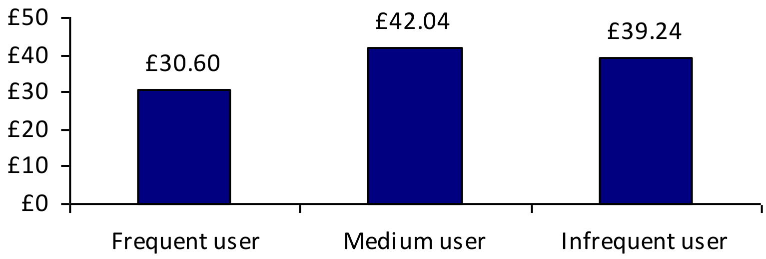


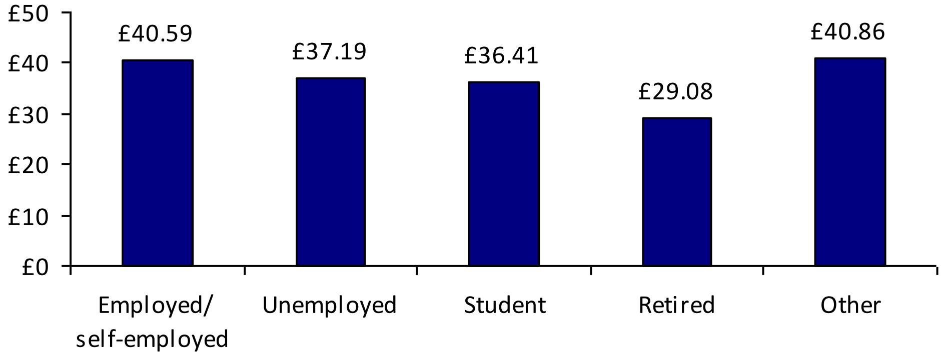
Figure 2.8 shows the analysis of average spend per head per trip against frequency of city centre visits, illustrating that those respondents who are classed as medium users generally spend the highest amount (42.04). In the 2011 survey, typical spend per head per visit by medium users was £35.53.

Figure 2.8: Average spend per visit by frequency of visit



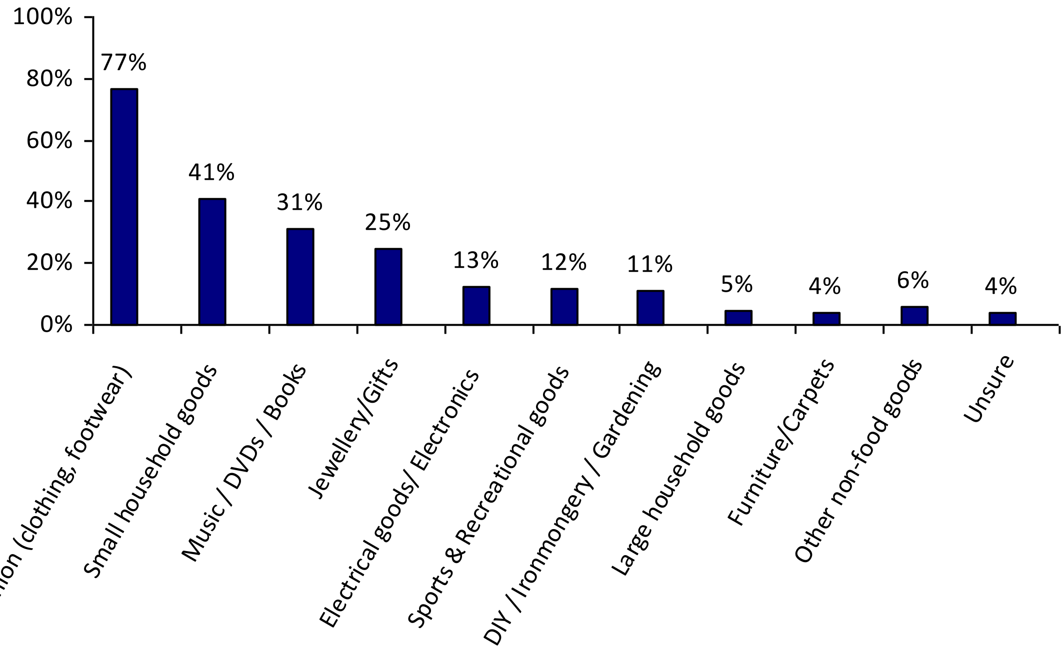
Cross-tabulation of average spend and employment status revealed that the 'other' category (including those who specified they were full time housewives, parents or carers) spent the most per head on an average shopping trip - £40.86 per visit. Employed people spent £40.59 per visit on average, followed by unemployed people who spent on average £37.19.

Figure 2.9: Average spend per visit by employment status



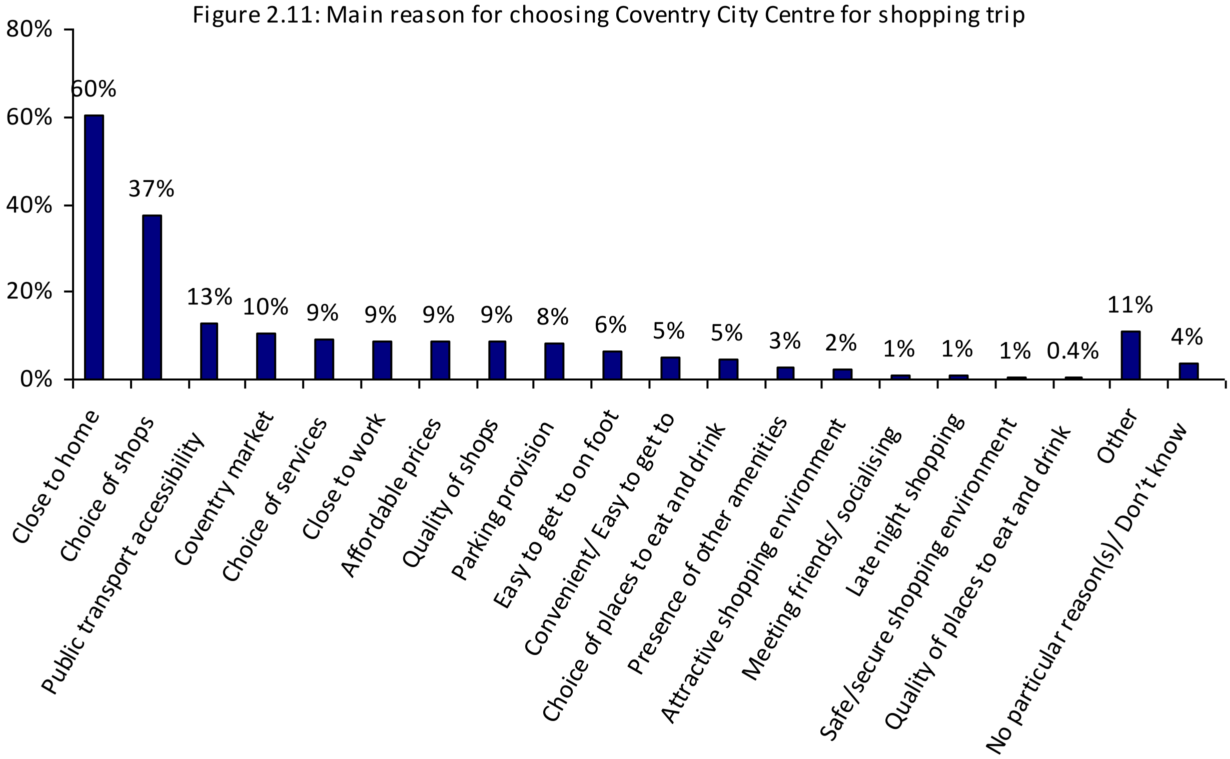
Asked to specify what types of non-food shopping they did fairly regularly, respondents indicated that their main purchases were clothing, footwear and other fashion items (77%). 41% specified small household goods and 31% frequently bought music, videos or books.

Figure 2.10: Types of non-food shopping done reasonably frequently



Respondents who ever shop in Coventry City Centre were asked to give their main reasons (up to three) for choosing to shop there. The two most popular reasons were proximity to home (60%) and choice of shops (37%). The third most cited reason was public transport links (13%). These top three reasons were the same as given in the 2011 survey.

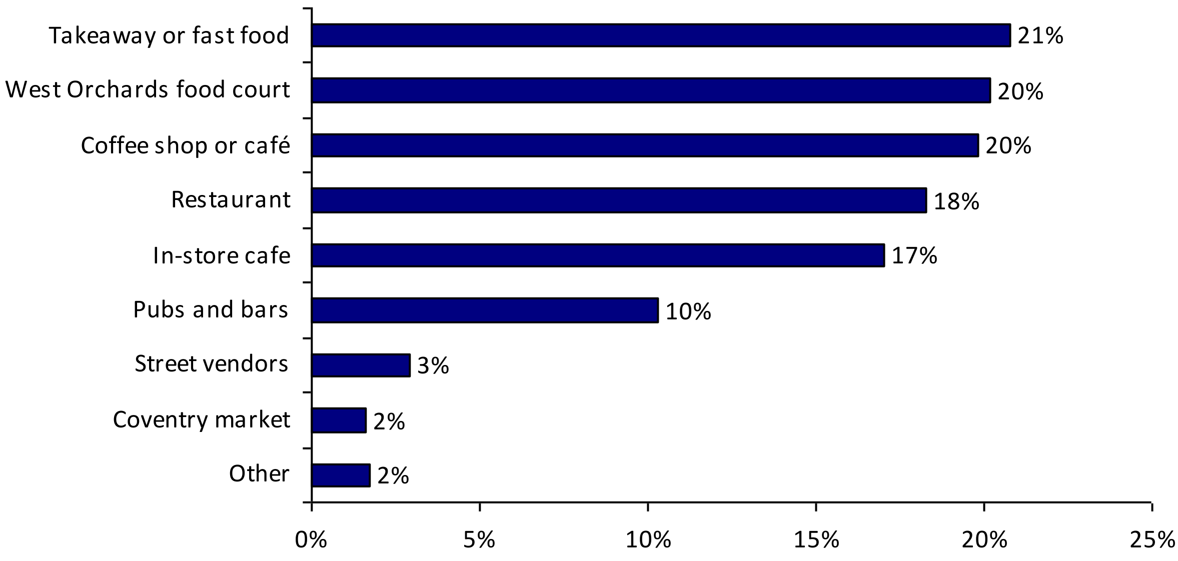
Figure 2.11: Main reason for choosing Coventry City Centre for shopping trip



A new question in the 2013 survey asked respondents who shopped in Coventry City Centre where they would typically go for a meal or snack should they decide to eat out during a shopping trip. 70% of shoppers specified at least one place.

West Orchards food court was the most frequently mentioned destination overall and the most popular individually named places were Marks and Spencer café, Costa coffee and McDonalds. When grouped by type, takeaways/ fast food outlets (21%), West Orchards food court outlets (20%) and coffee shops/ cafes (20%) were the most popular categories.

Figure 2.12 Eating out during shopping trip: preferred destinations (grouped)

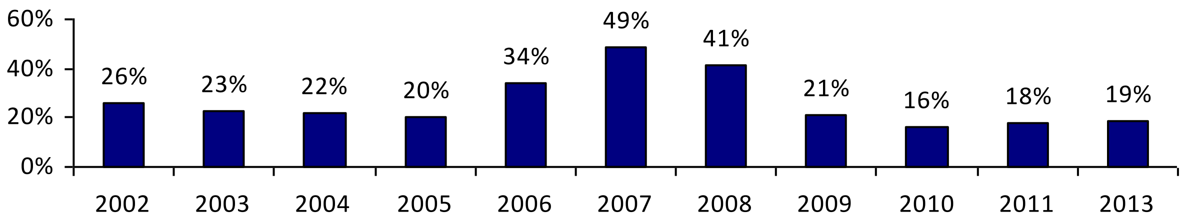


5.3. Food and non-food shopping

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

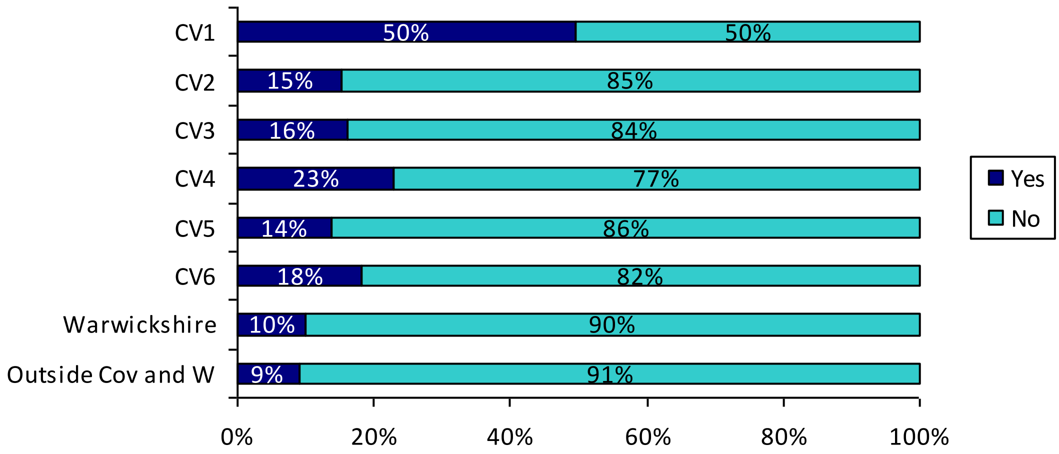
19% of those surveyed said that they normally did their main food shopping in Coventry City Centre.

Figure 3.1: Coventry City Centre is main centre for food shopping - trend



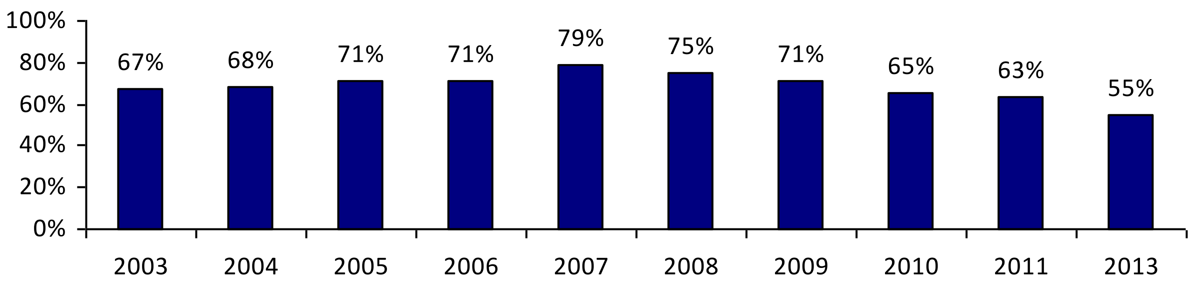
As in previous surveys, respondents who resided in CV1 postcodes relied most heavily on food shopping in the city centre, with 50% of respondents living there stating that the city centre was their main centre for food shopping (fig. 3.2).

Figure 3.2: Do main food shopping in Coventry City Centre by postcode



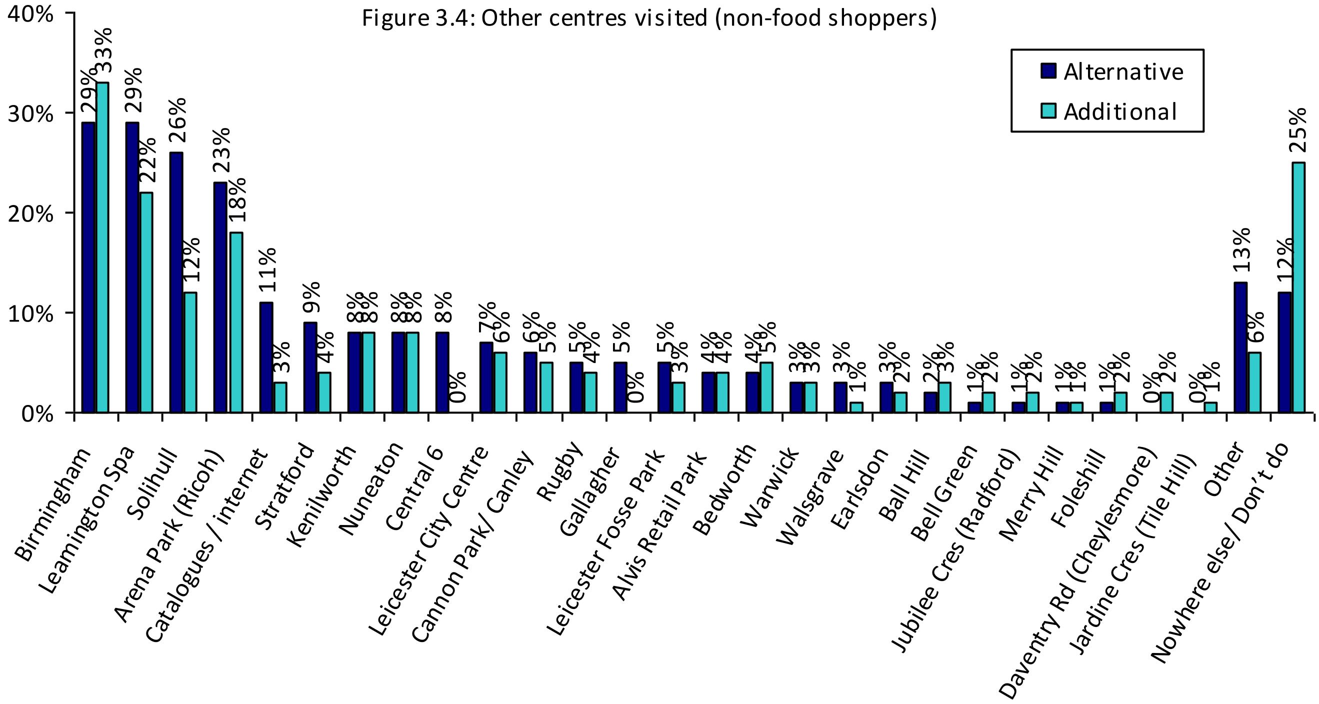
For non-food shopping, just over half of respondents (55%) said that Coventry City Centre was their main centre for the purchase of clothes and other non-food items. This result has been declining since 2007.

Figure 3.3: Coventry City Centre is main centre for non-food shopping - trend

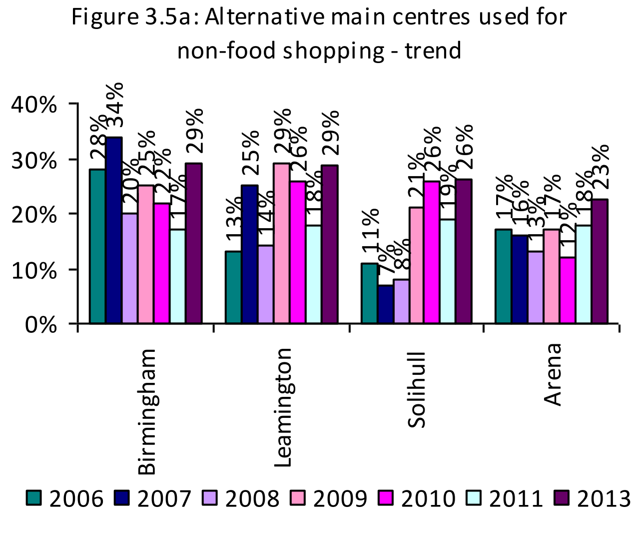


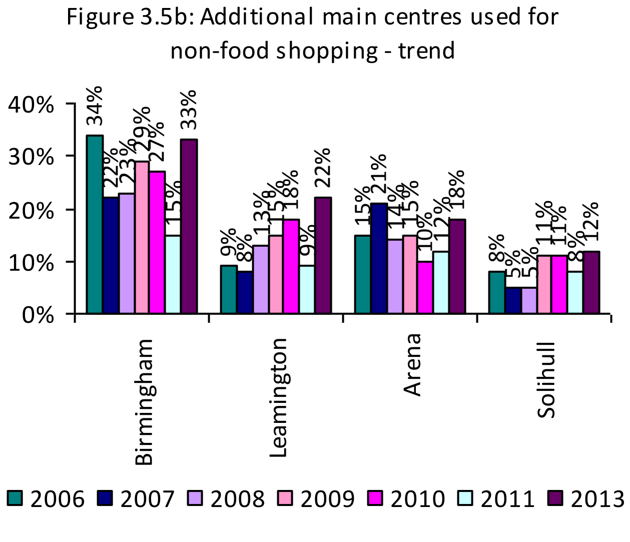
In terms of major areas of competition for non-food shopping i.e. where people who do not use Coventry City Centre go instead, Birmingham (29%), Leamington Spa (29%), Solihull (26%) and Arena Park/ Ricoh Arena (23%) were seen to be the most popular alternatives.

Amongst those who said they did the majority of their non-food shopping in Coventry City Centre, a quarter reported that they shopped nowhere else. For the city centre users who said they also visited other places for non-food shopping, the most popular additional retail centres visited were, similarly, Birmingham (33%), Leamington Spa (22%), Arena Park/ Ricoh Arena (18%) and Solihull (12%).



Tracking the popularity of the most popular alternative and additional destinations for non-food shopping (figs 3.5a and 3.5b) shows increased use of all four centres as both alternative and additional centres compared to the 2011 survey.



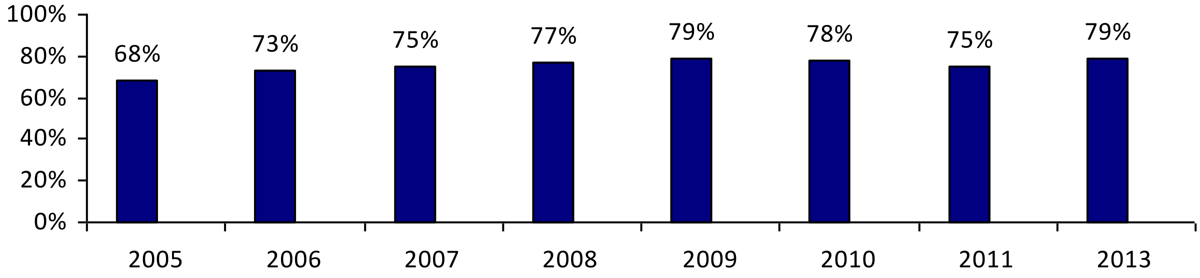


5.4. Out-of-town retail

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

79% of all respondents said they used out-of-town retail parks, which was a 4% increase since the 2011 survey. This proportion has shown a steady increase almost every year since the question was first included in 2005.

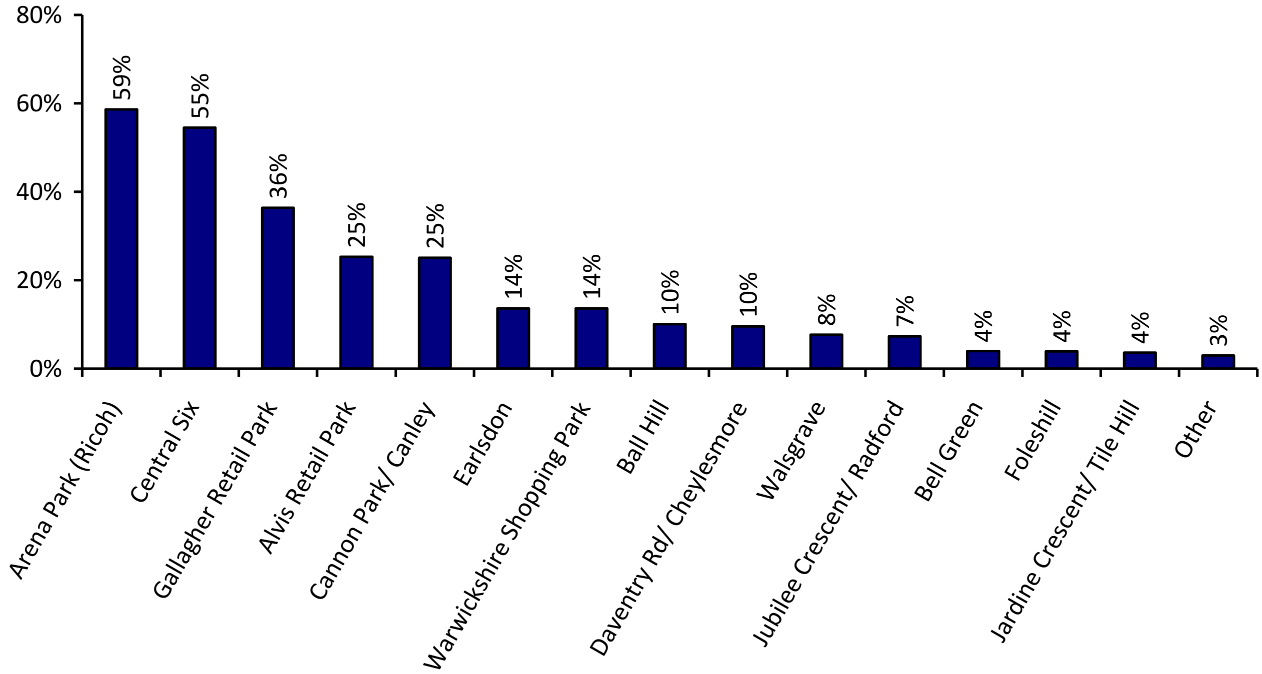
Figure 4.1: Do you use out of town retail parks? - trend



Arena Retail Park was, once again, the most popular out-of-town retail park, with 59% of retail park users shopping there (43% in 2011). Central Six was used by 55% and Gallagher Park attracted 36%.

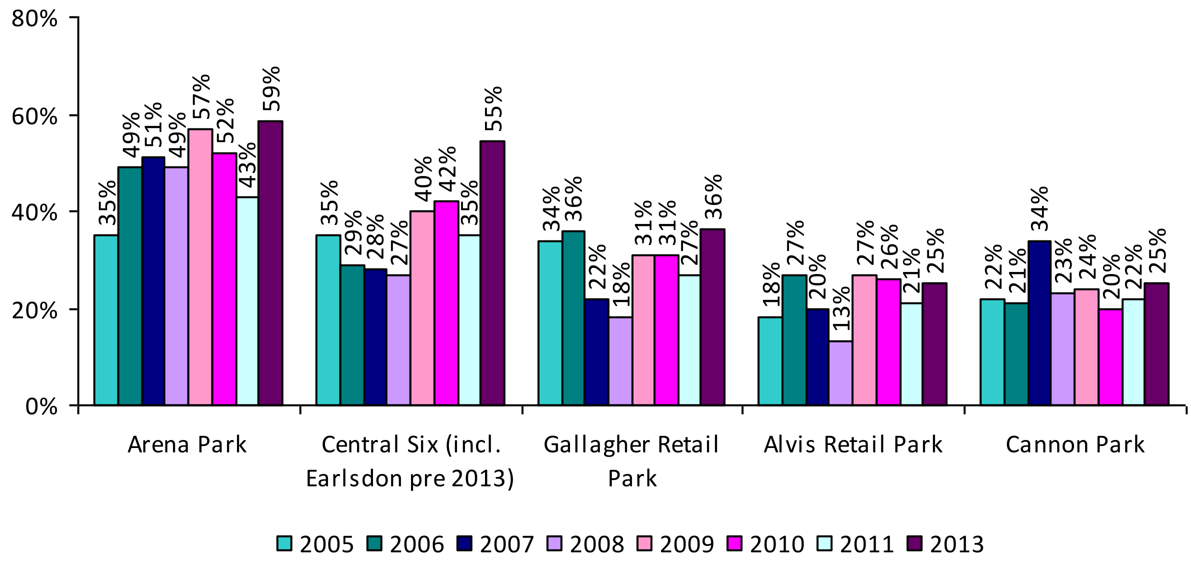
2013 saw the opening of Warwickshire Shopping Park, a new out-of-town centre at Binley, and this was already proving popular by the time the survey was conducted, with 14% of retail park users saying they used it as an out of town destination.

Figure 4.2: Out-of-town retail parks used (% of retail park users)



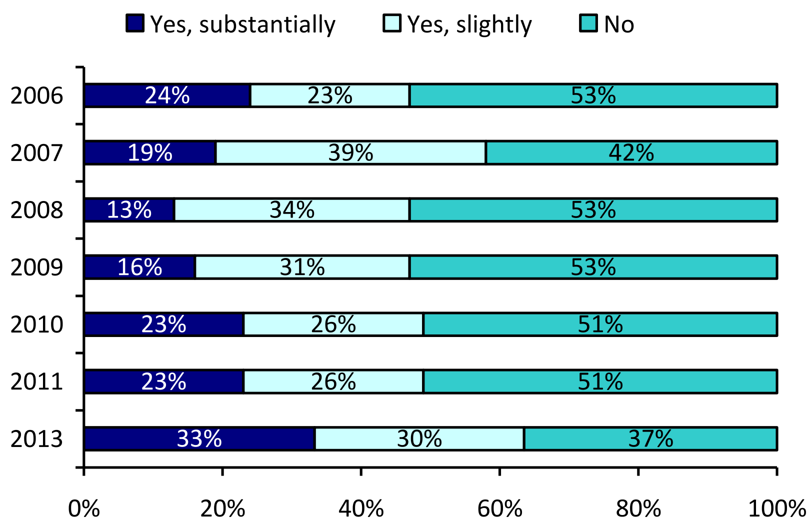
Analysis of use of the most popular out-of-town retail parks over time shows that, since 2011, there has been an increase in the proportion of retail park users shopping at each of them. The top three, Arena, Central Six and Gallagher, have seen increases of 16%, 20% and 9% respectively. From 2013, Central Six is no longer combined with Earlsdon as one of the response options yet, despite Earlsdon shoppers now being recorded separately, Central Six shows the greatest increase since 2011.

Figure 4.3: Out-of-town retail parks used (% of respondents using retail parks) - trend



Looking at the impact of out-of-town retail parks on city centre shopping shows that almost two thirds of respondents (63%) report their use of Coventry City Centre for non-food shopping has reduced to some degree as a result of out-of-town destinations– an increase of 14% since 2011.

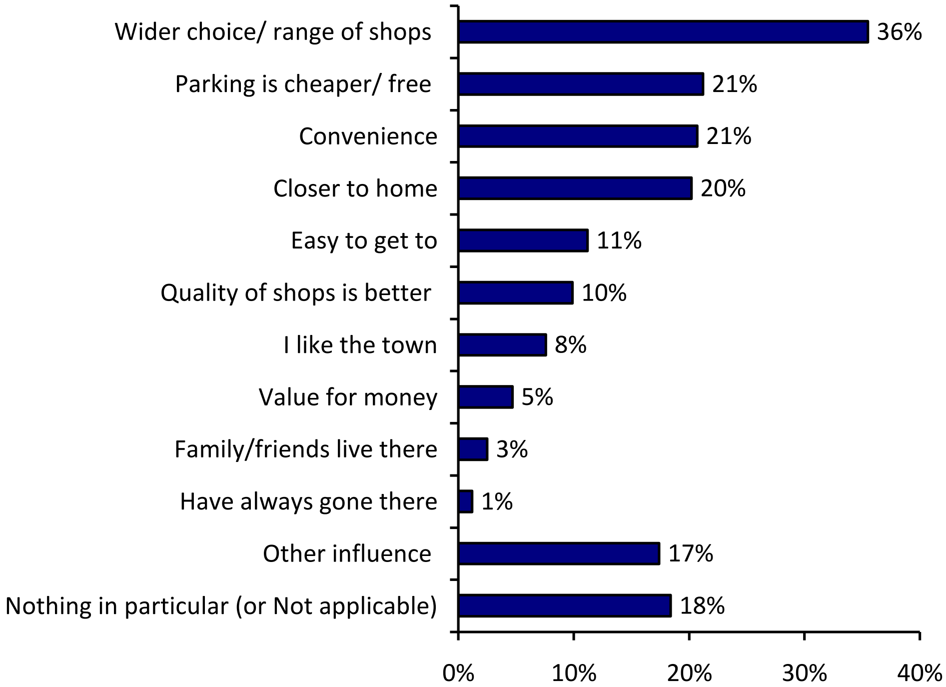
Figure 4.4: Have out-of-town retail parks reduced your use of Coventry City Centre for non-food shopping? - trend



5.5. Shopping at other centres: Influencing factors

Respondents were asked to say, if they ever shopped for non-food items anywhere other than Coventry City Centre, what factors influenced their decision to shop elsewhere. The most common reason given was a better choice and range of shops on offer at alternative centres (36%). Availability of cheaper or free parking and general convenience were each influencing factors for 20% of the sample. The categories shown in fig. 6.1 are coded from unprompted response to this question and it is interesting to note that parking charges featured in just 5% of 2011 responses.

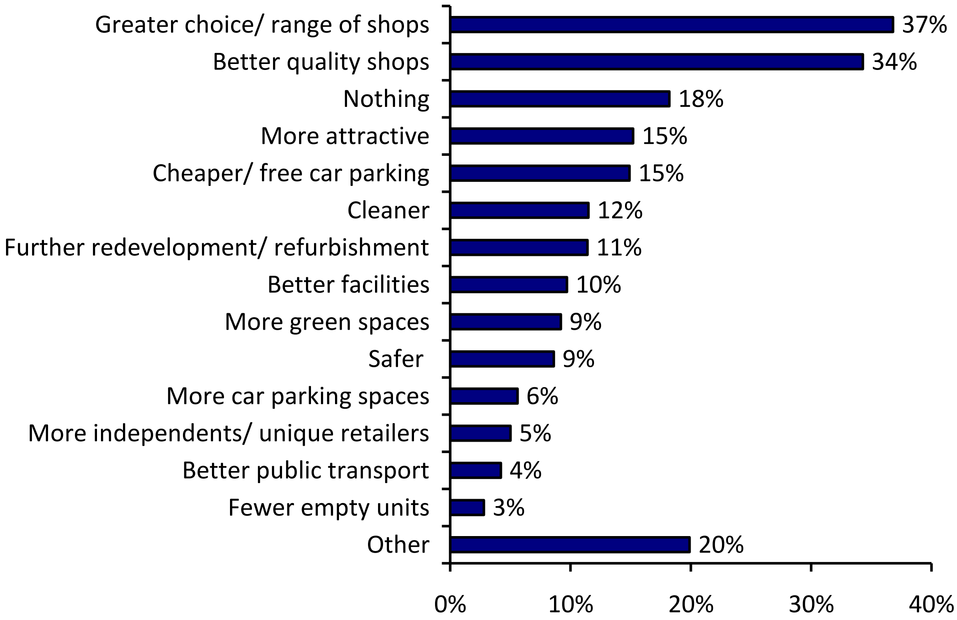
Figure 5.1: If you ever do non-food shopping outside Coventry City Centre, what mainly influences your decision of where to go?



5.6. Improvements to Coventry City Centre and shopping offer wishlist

Respondents were asked what improvements they would like to see made to the city centre. Their unprompted responses were grouped into categories as shown in fig.6.1. As in previous years greater choice of shops (37%) and better quality shops (34%) were the most common requests for improvement (the proportion asking for greater choice having increased from 26% in 2011 when it was the second highest improvement request). The third largest group said they would change nothing (18%).

Figure 6.1: What would you change to improve Coventry City Centre



Questioned about which new brands they would like to see in the city centre, 62% of respondents made at least one request. Fig. 6.2 shows the most popular brands requested. John Lewis is clearly still the most sought after store, with 35% of respondents who made a suggestion wanting to see this brand opened in Coventry City Centre. Another department store, House of Fraser, is the second most desired name with 12%. 5% indicated that they were missing Monsoon, a brand which has closed down its city centre branch since the 2011 survey, however the 3% who requested TJ Hughes, another previous feature of Coventry City Centre, will no doubt have been pleased that this brand has reopened at its old location since the 2013 survey took place.

Figure 6.2: Brands requested (% of respondents making suggestions)

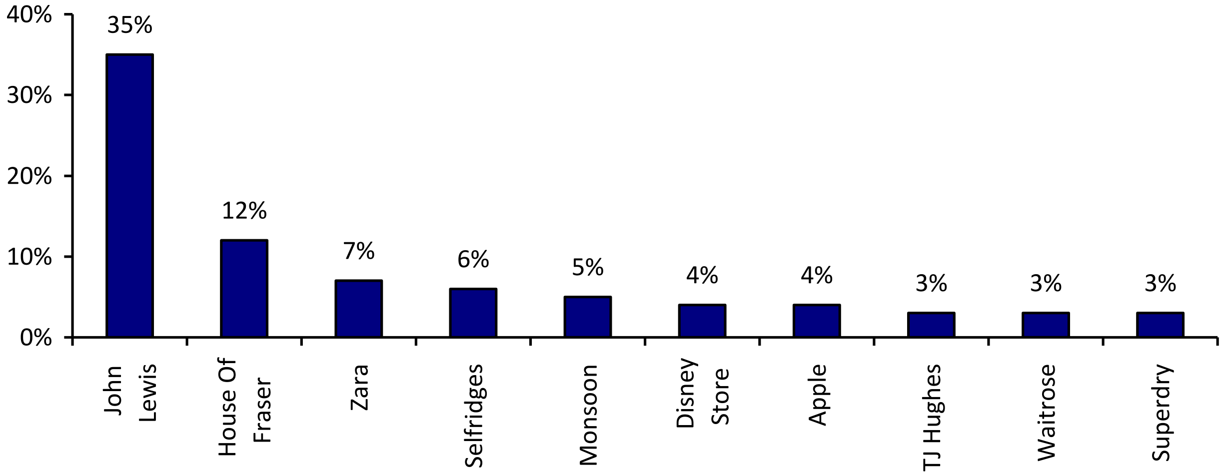
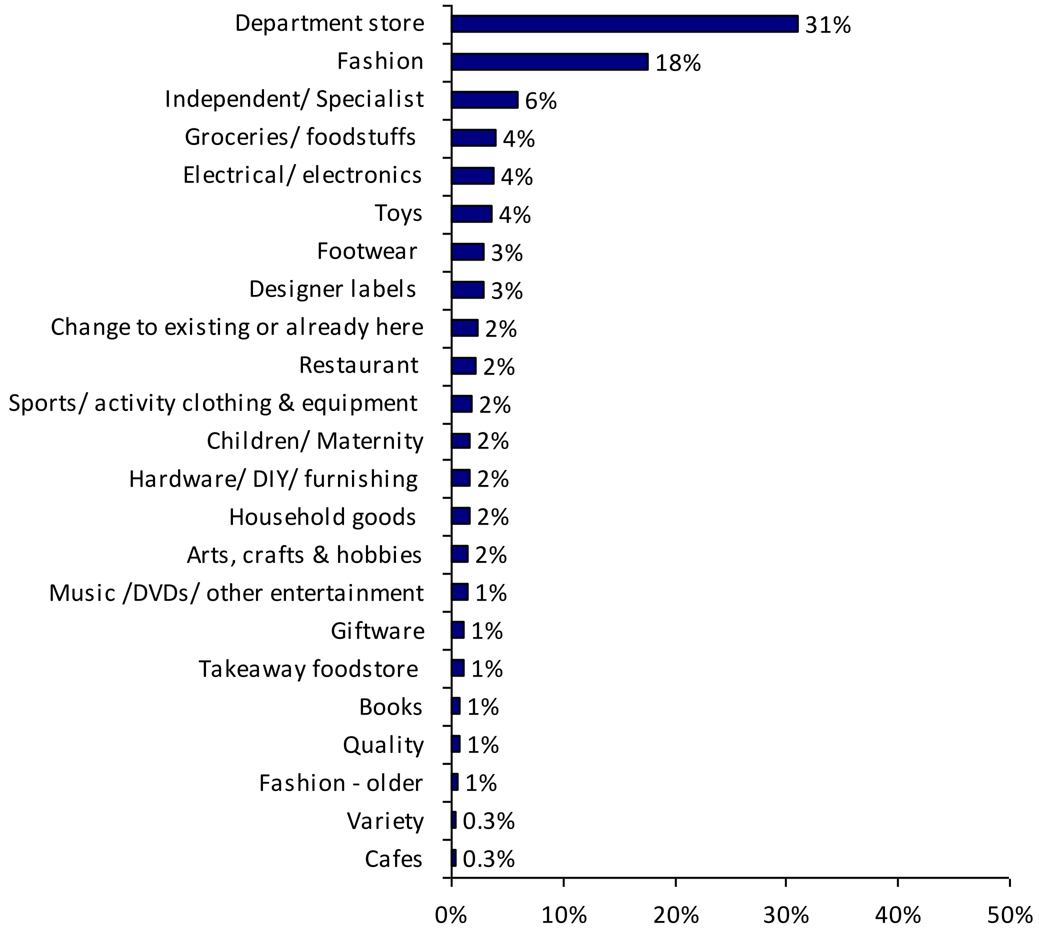


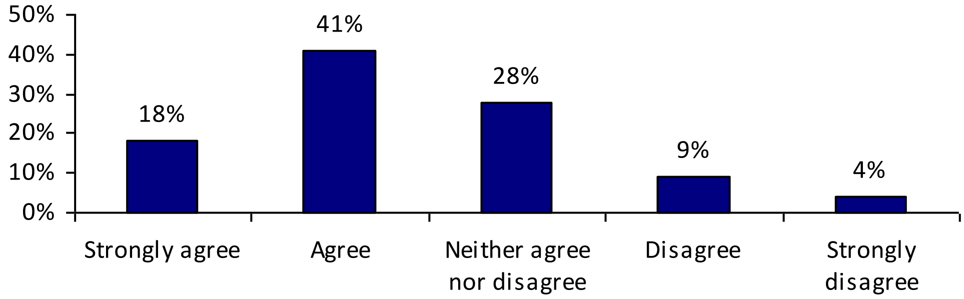
Figure 6.3 shows the breakdown of suggestions grouped into shop type and displayed as a percentage of all requests received. As already noted, a new department store features high on people's wishlist for Coventry City Centre (31%) and they would also like to see more fashion outlets (18%).

Figure 6.3: Type of shop requested (% of suggestions made)



When asked to what extent they agreed that the redevelopment of Broadgate, Trinity Street, Gosford Street, Hertford Street and the connection between the rail station and Bull Yard has improved the city centre, encouragingly, 59% of respondents said that they agreed or strongly agreed. 13% disagreed or strongly disagreed and just over a quarter had no opinion.

Figure 6.4 To what extent do you agree that recent redevelopment work has improved the city centre?



5.7. Other uses of Coventry City Centre

61% of respondents indicated that they use the city centre for reasons other than shopping. Looking at results over time this is the lowest proportion since 2007. Those using the city centre for other reasons were more likely to be younger age groups, with 73% of those aged under 35 years using the city centre for reasons other than shopping compared to 56% of those aged 55 and over.

Figure 7.1: Use Coventry City Centre for reasons other than shopping - trend

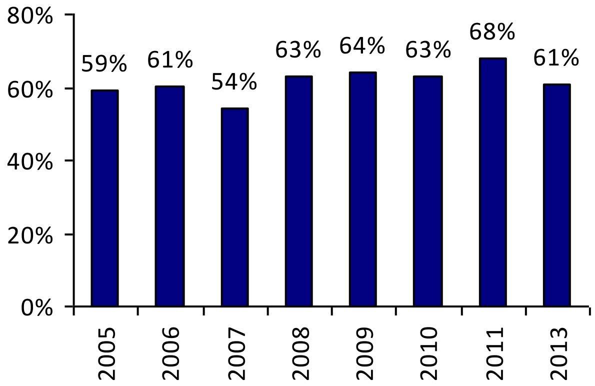
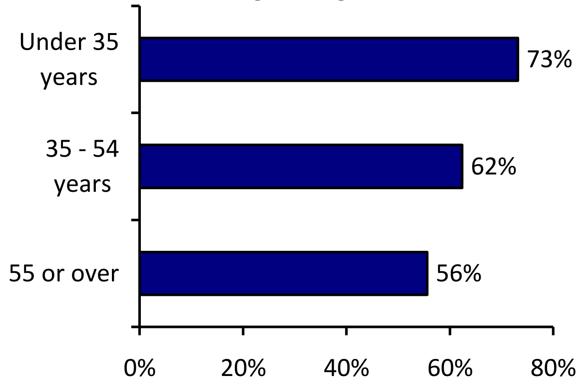
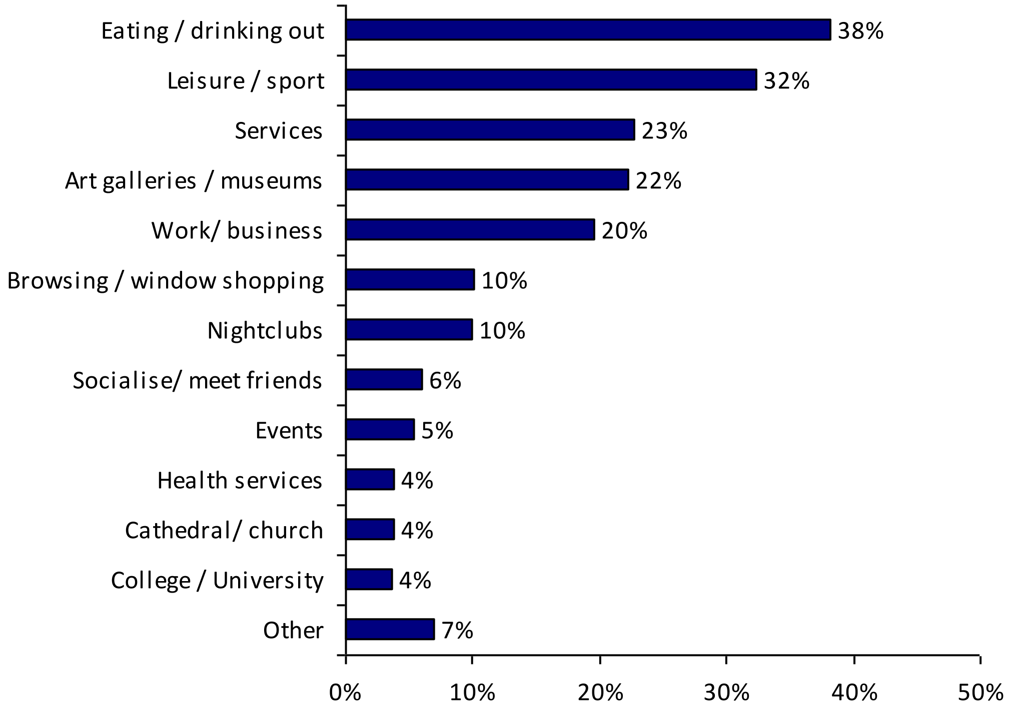


Figure 7.2: Use city centre for other reasons against age



Amongst those who use the city centre for other reasons, eating/drinking out, leisure/sport activities and accessing services were the most popular non-shopping activities reported (38%, 32% and 23% of respondents respectively).

Figure 7.3: Other reasons for visiting Coventry City Centre (% of respondents using city centre for other reasons)

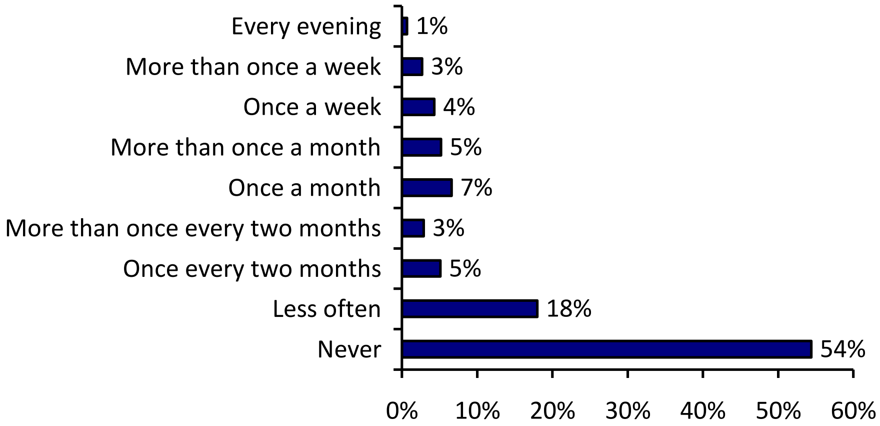


5.8. Evening Visits

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.

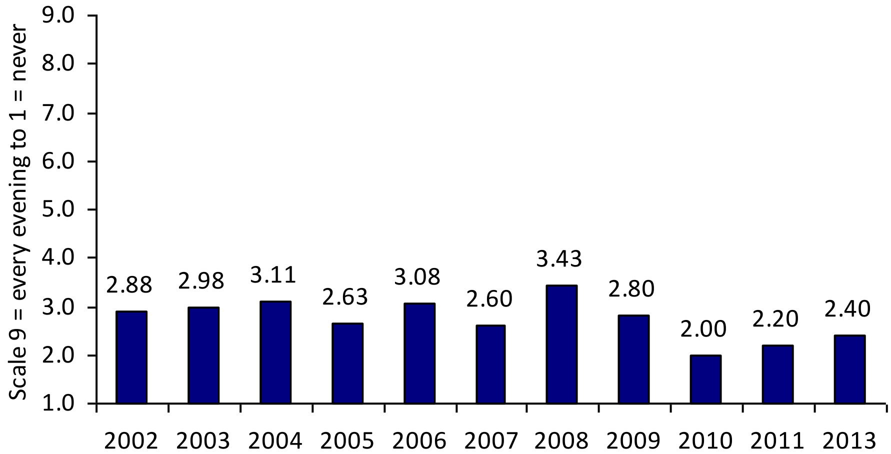
Overall, 46% of the sample reported that they visited Coventry City Centre in the evening, 8% visiting in the evening at least once a week. Over half of respondents (54%) said that they never visited the city centre in the evening.

Figure 8.1: Frequency of trips to Coventry City Centre in the evening



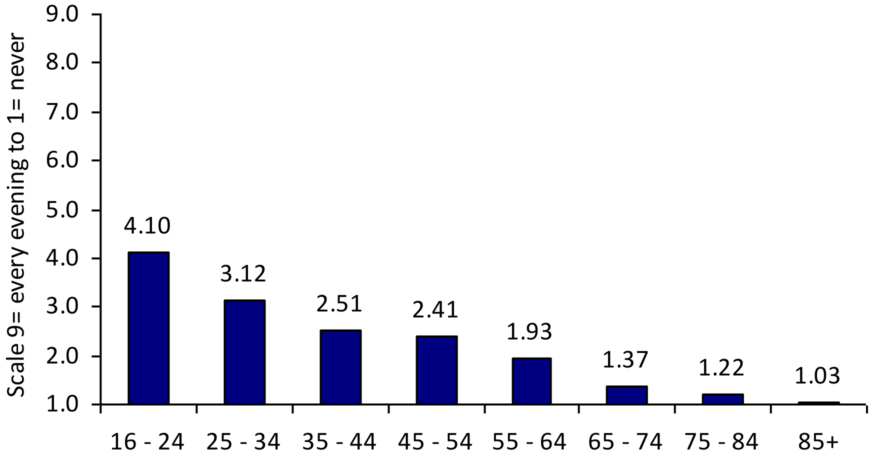
In 2013, average frequency of visits in the evening has increased very slightly over the last two years. On a scale of 1 to 9, where 1 is never and 9 is every evening, the mean frequency is 2.4.

Figure 8.2: Average frequency of trips to Coventry City Centre in the evening - trend



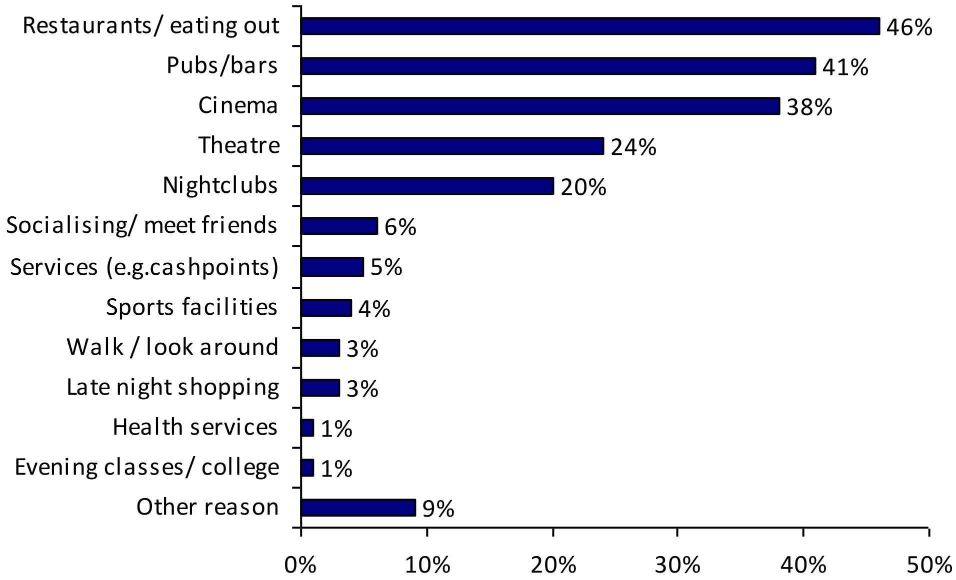
There remains a correlation between age and evening usage of the city centre, cross-tabulation showing that (on the same scale of 1 to 9) average frequency of evening visits by respondents from older age groups is much lower than that of younger age groups.

Figure 8.3: Average frequency of trips to Coventry City Centre in the evening against age



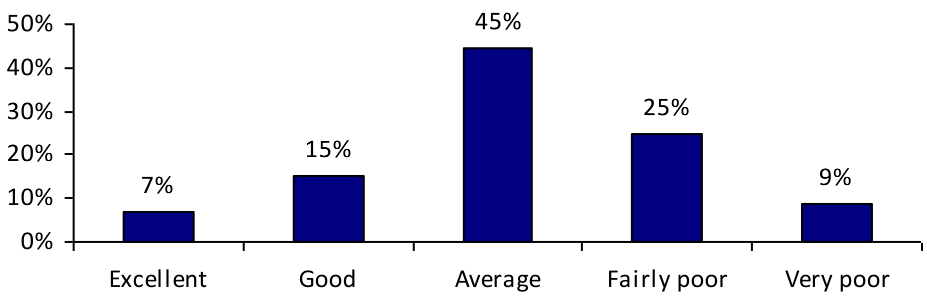
The most common reasons given for visiting Coventry City Centre in the evening were to visit restaurants (46%), theatre (41%) pubs (38%) and the cinema (24%).

Figure 8.4: Reasons for visiting Coventry City Centre in the evening (% of evening visitors)



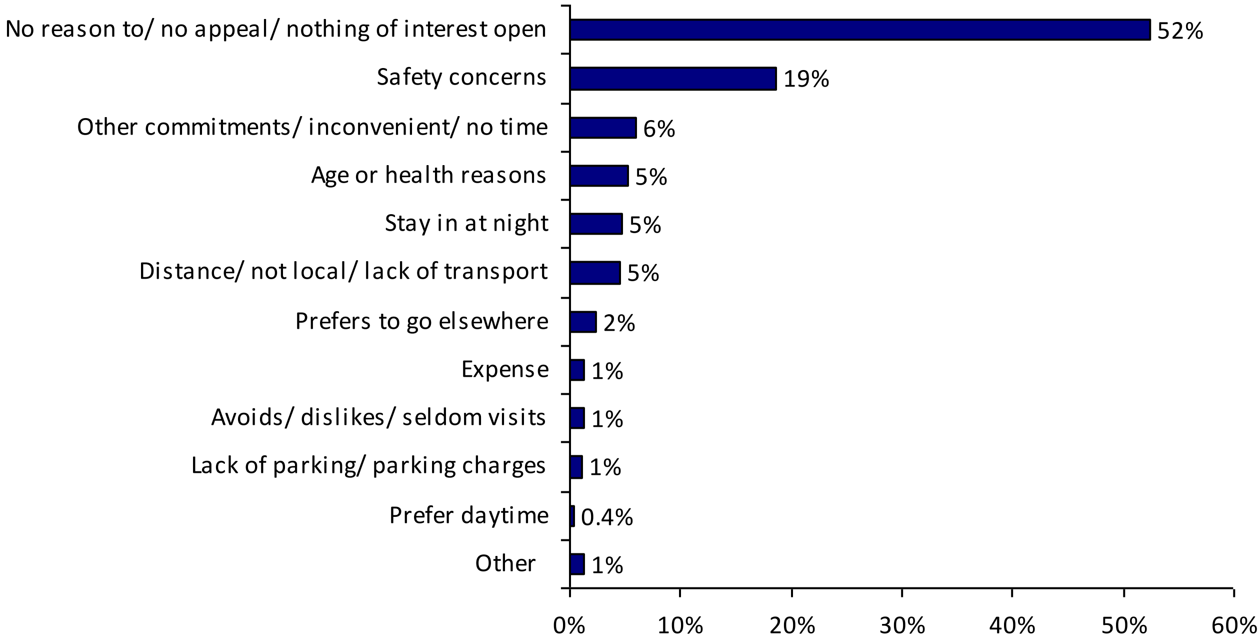
Respondents who visited the city centre in the evening were asked for their impression of the city centre at this time. Most evening visitors (45%) rated it as average, a third thought it fairly or very poor (6% more than in 2011) and 22% gave an excellent or good rating.

Figure 8.5:Overall impression of Coventry City Centre in the evening



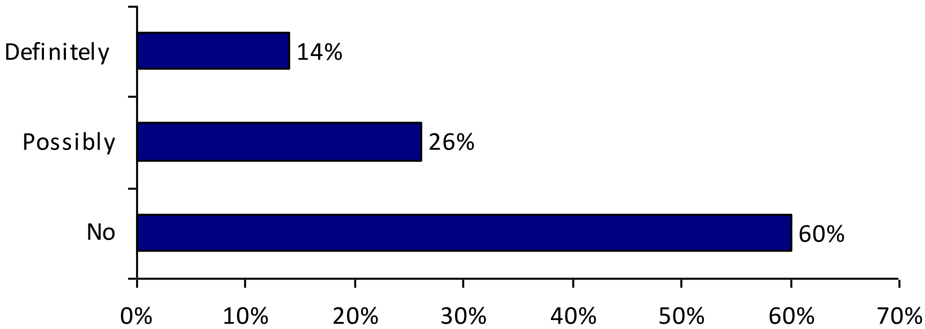
The majority of respondents who did not visit the city centre during the evening said that this was largely due to a lack of appeal/ they could see no reason to (52%). The other main reason for not using the city centre in the evening was safety concerns (19%).

Figure 8.6: Reasons for not visting Coventry City Centre in the evening



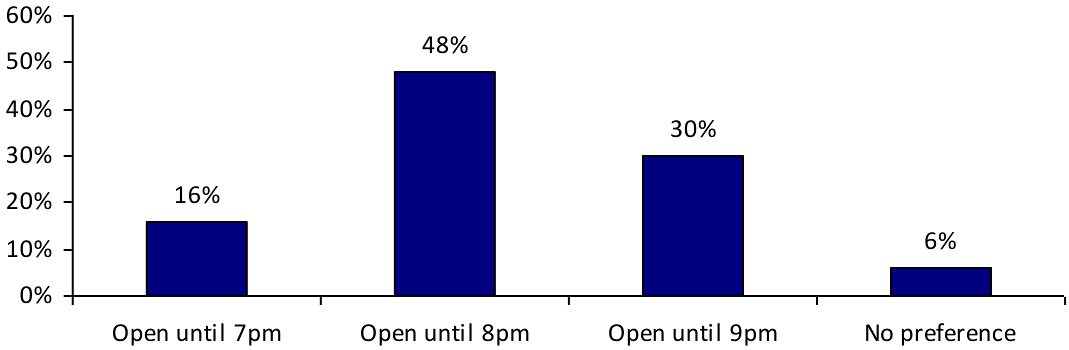
Respondents were asked if they would be encouraged to use Coventry City Centre during the evening if the shops were open later, to which 40% indicated that they would and 60% said no.

Figure 8.7: If shops were open later would it encourage you to visit Coventry City Centre in the evening



Those respondents who selected that they would definitely or possibly visit Coventry City Centre during the evening if shops were open later were then asked how late they would ideally like retailers to stay open for. Just under half of those who wanted later opening hours said that they would like shops to stay open until 8pm (48%), followed by 30% who said that they would prefer the shops to stay open until 9pm. 6% had no preference.

Figure 8.8 How long shops should stay open for (% of respondents who would definitely or possibly visit Coventry City Centre if shops opened later)

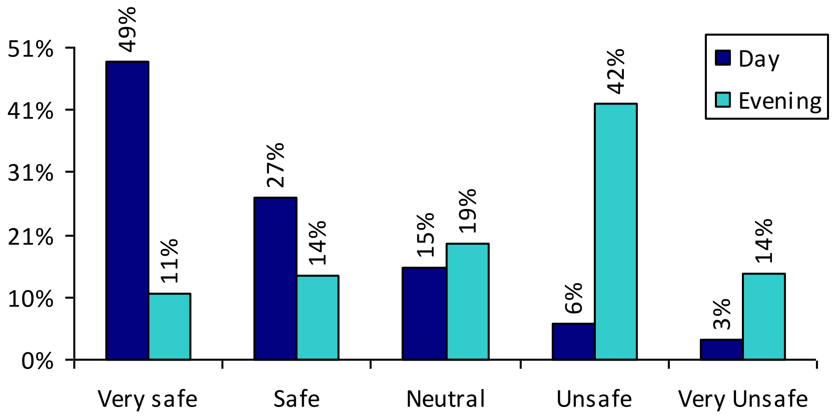


5.9. Perceptions of Safety

Respondents were questioned about their feelings of safety in Coventry City Centre and asked to identify factors that have a negative impact on their perceptions of safety.

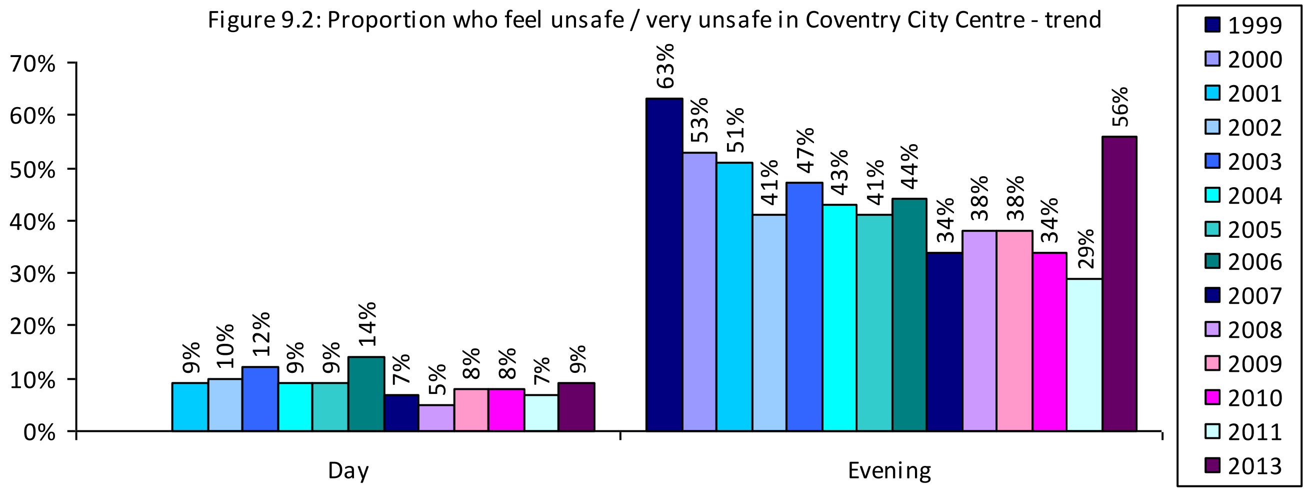
Figure 9.1 illustrates the difference in respondents' feelings of safety during the daytime and at night. There is a marked difference between daytime and evening safety perceptions with only 9% of respondents feeling unsafe or very unsafe during the day, compared to 56% in the evening.

Figure 9.1: Feeling of safety during day and evening

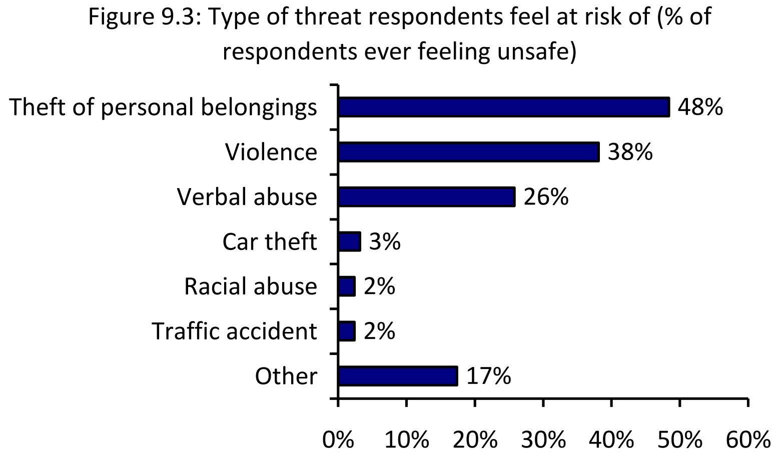


Time analysis of safety concerns within the city centre show that, up to 2011, the proportion feeling unsafe in the evening had more than halved since the survey began in 1999. However, latest figures show that this has almost doubled again in 2013 to 56% (up 27%). The small proportion of respondents feeling unsafe during the daytime has remained relatively low.

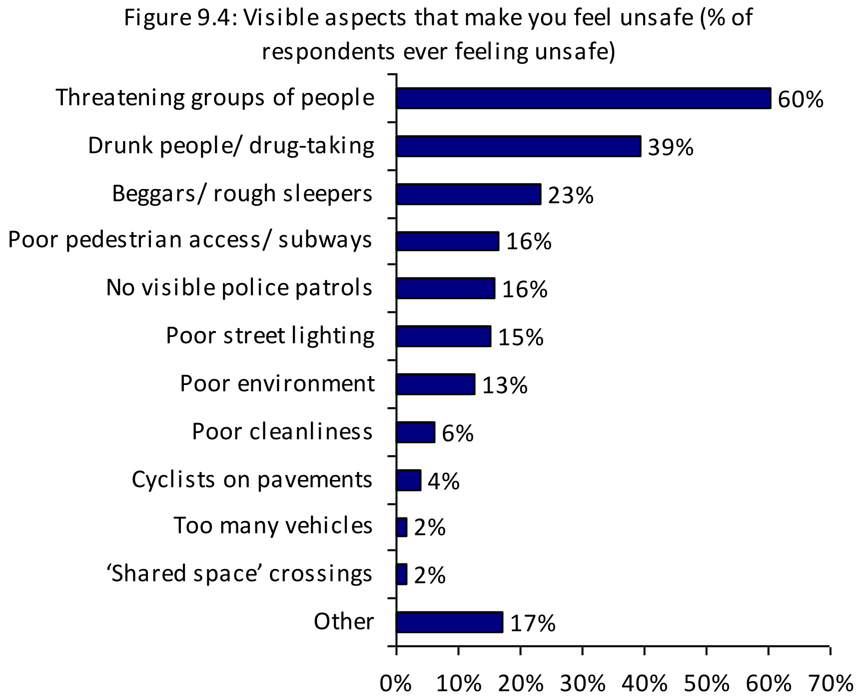
Figure 9.2: Proportion who feel unsafe / very unsafe in Coventry City Centre - trend



Amongst those who felt unsafe, the main fears reported were theft of personal belongings (48%) and violence (38%). ‘Other’ responses were largely related to anti-social behaviour and general feelings of intimidation (e.g. around certain groups).



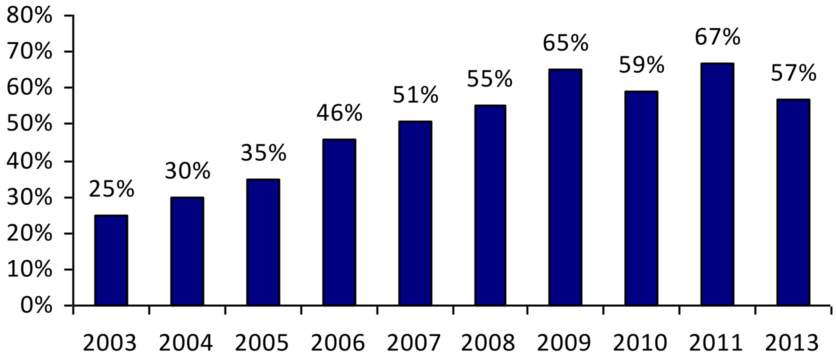
60% of respondents who felt unsafe said that threatening groups of people/ gangs are the main visible aspect of Coventry City Centre that unsettles them. In a similar vein, 39% said people taking drugs or being drunk is a reason why they feel unsafe in the city centre and the presence of rough sleepers or beggars was cited by almost a quarter of respondents as cause for concern. The ‘other’ responses gathered specified a wide range of other aspects including both physical and human elements (e.g. skateboarders, lack of security guards, narrow passages).



5.10. Events

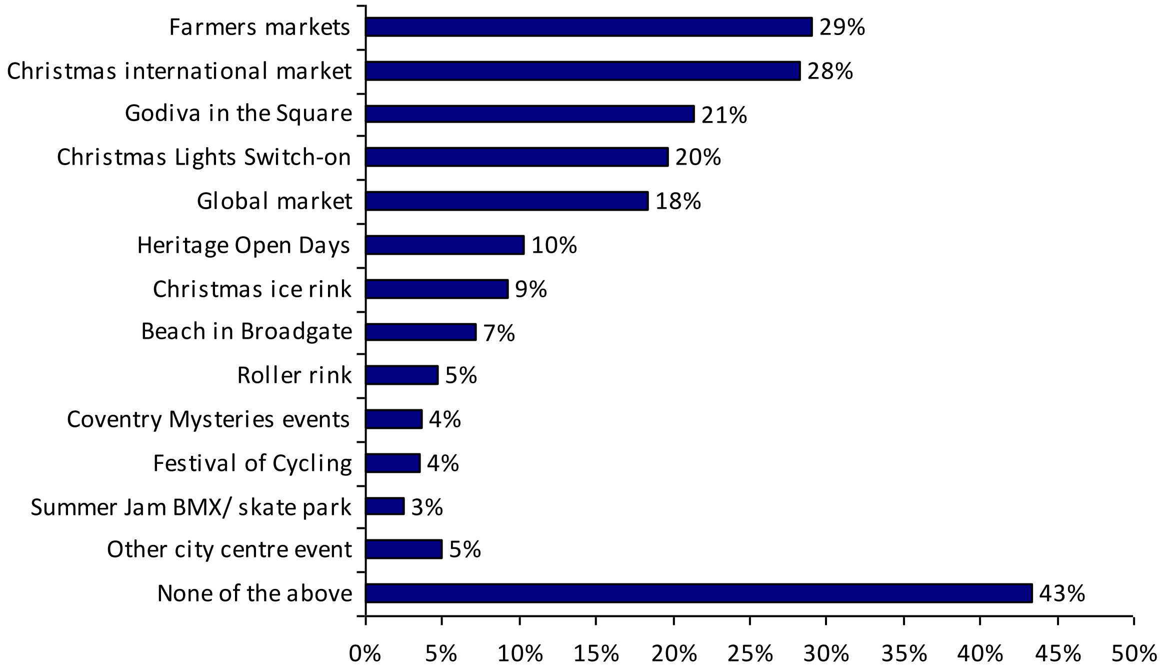
Asked about their attendance at city centre events over the previous twelve months, over half of respondents (57%) indicated that they had attended at least one organised event in the past year – this figure is down 10% compared to the 2011 survey.

Figure 10.1: Attended at least one city centre event - trend



Markets continued to be the most popular events. 29% of respondents had attended one or more of the monthly Farmers' markets (compared to 35% in 2011) and 28% had visited the Christmas International market. A fifth of respondents said that they had visited Godiva in the Square event (21%) which was held in the city centre following the cancellation of the main Godiva Festival 2012.

Figure 10.2: City centre event attendance



The events offer appealed to all ages, with those in the 35-44 age group having the highest level of attendance (64% of this age group had attended at least one event). Looking at event attendance by postcode showed that around a third of non-Coventry residents surveyed had attended at least one event in the city centre (36% of respondents from Warwickshire and 27% of respondents from outside Coventry and Warwickshire)

Figure 10.3a: Attended at least one event by age

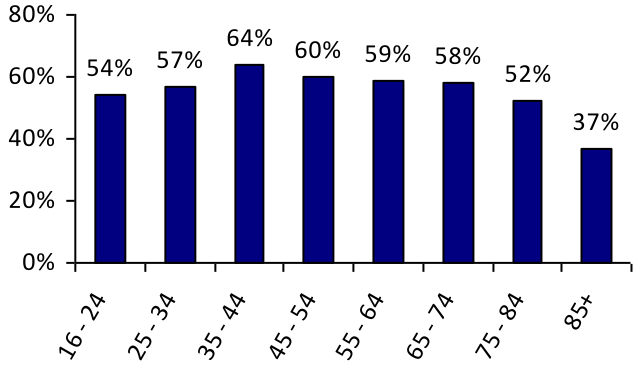
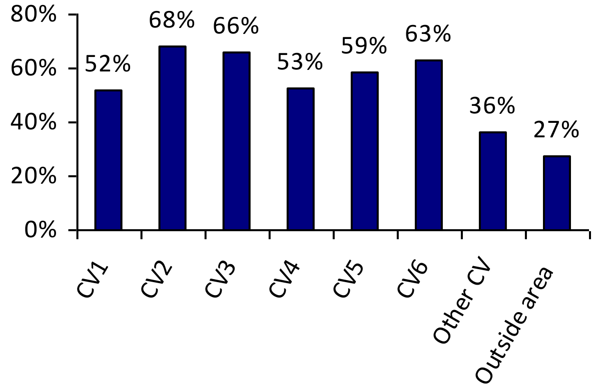


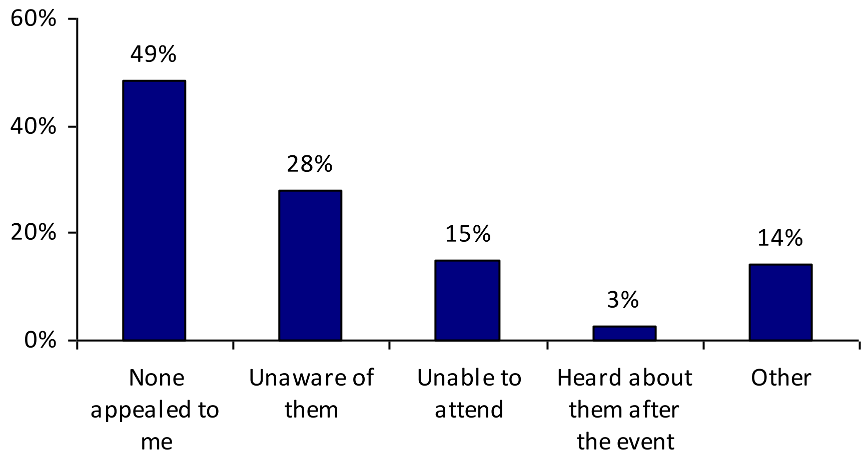
Figure 10.3b: Attended a least one event by postcode



55% of event attendees said that they had visited the city centre more often, in general, as a result of event attendance (this compares to 31% in 2011). This underlines the importance of city centre events for changing visitor perceptions of the city and increasing footfall.

The 43% of respondents who said that they had not attended any event in the preceding twelve months were asked whether there was a reason for this. 49% of non-attendees said none of the events had appealed. The next most common reason (accounting for 28% of respondents) said that they were not aware events were being held. 'Other' responses included no time, transport issues and not wanting to make a special trip into the city centre.

Figure 10.4: Reason(s) have not attended any city centre event



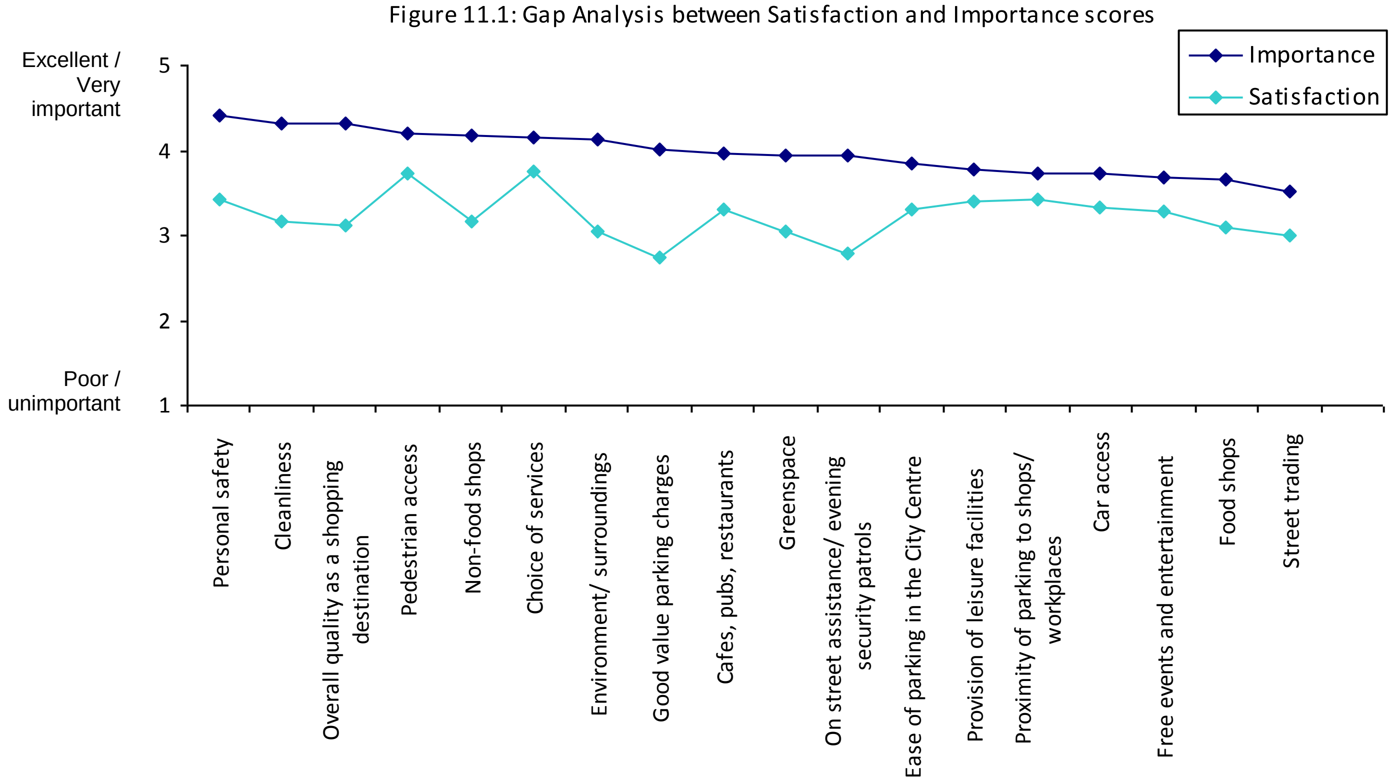
5.11. Perceptions of Coventry City Centre

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.

Respondents first rated how important a list of aspects are for creating a city centre they would want to visit. They then rated how satisfied they are with those same aspects in Coventry City Centre. The mean score for importance of each and, similarly, the mean satisfaction score were calculated and results are shown in fig. 11.1 (aspects are presented in descending order of importance from the left; the nearer the pale satisfaction line is to the darker importance line, the better Coventry City Centre is meeting people's expectations with regards to that aspect).

Personal safety and cleanliness remain the two areas where people place greatest importance but the gaps show there is much scope for improvement in terms of people's satisfaction levels with these aspects. The largest gaps evident are for good value parking charges and on-street assistance/ security patrols.

Figure 11.1: Gap Analysis between Satisfaction and Importance scores



Gap analysis highlights what aspects of the city centre people hold to be important and those areas that most need improving to meet expectations. Greyed areas in table 11.2 highlight which aspects respondents deemed as very important that they reported finding either very satisfactory or unsatisfactory. Choice of services is the one area classed as very important where people are generally very satisfied (importance score 3.75, satisfaction score 4.15). Good parking charges is another very important aspect but one where people are unsatisfied (importance score 4.01, satisfaction score 2.73).

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

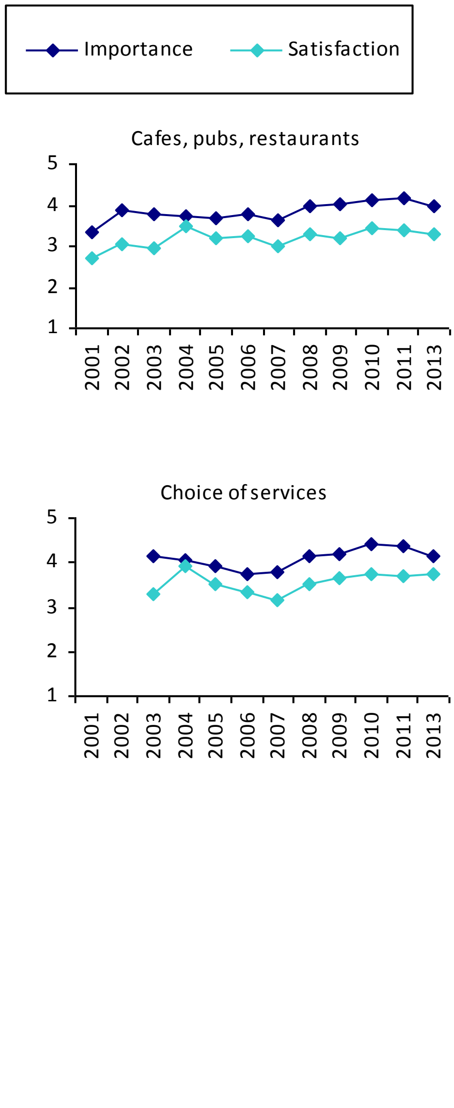
	Very Unsatisfactory	Unsatisfactory	OK	Satisfactory	Very Satisfactory	
Very Important	**E**	**D** Good value parking charges	**C** Non-food shops Cleanliness Overall quality as a shopping destination Environment/ surroundings	**B** Personal safety Pedestrian access	**A** Choice of services	5
Important	**e**	**d**	**c** Food shops Greenspace Street trading On street assistance/ evening security patrols	**b** Proximity of parking to shops/ workplaces Provision of leisure facilities Car access Cafes, pubs, restaurants Ease of parking in the City Centre Free events and entertainment	**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.

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)



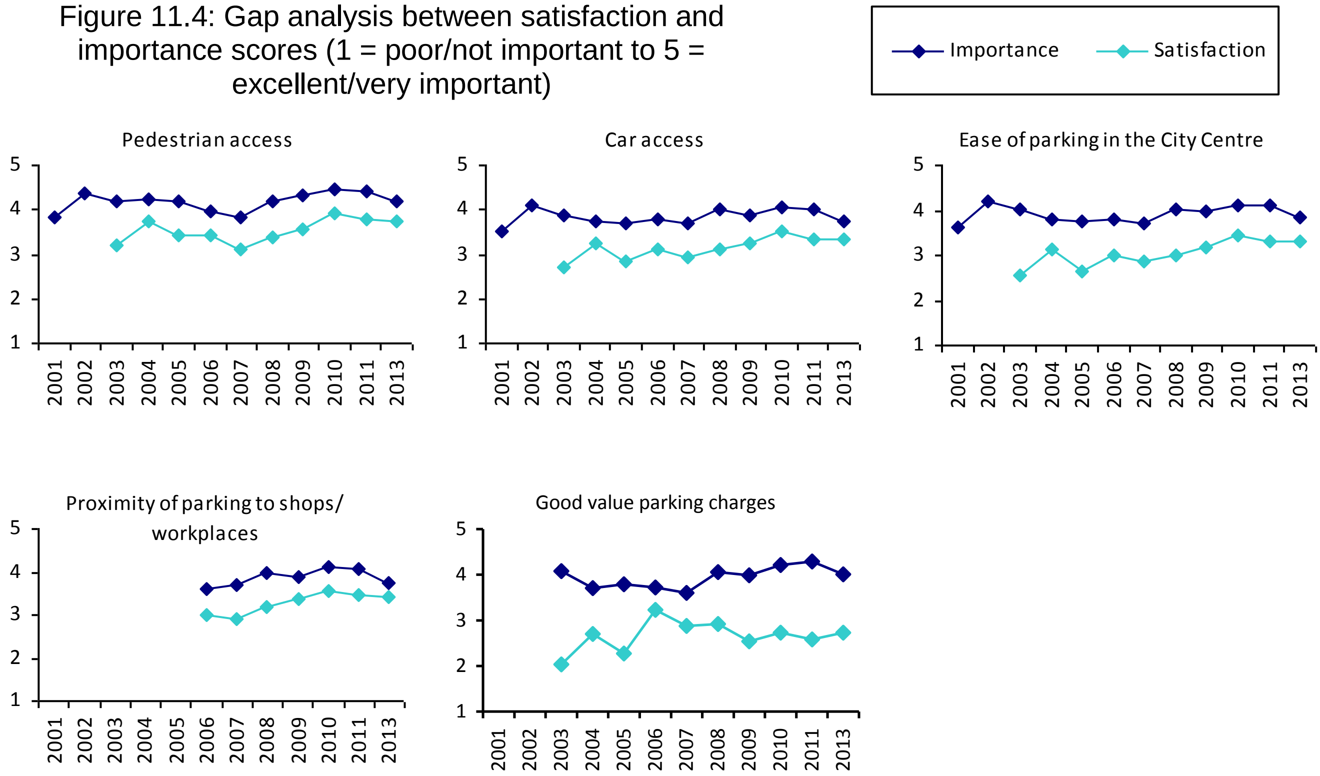
As already noted in fig.11.2, choice of services is the aspect where the gap is narrowest overall in 2013. Although this is a result of a lower importance rankings as well as higher satisfaction levels recorded since 2010, this is the one area where Coventry City Centre appears to be meeting expectations.

Non-food shops, meanwhile, displays the widest gap between importance and satisfaction in this section in 2013, supporting evidence gathered elsewhere in the survey (see section 5.6) that people want more variety in the city centre offer for non-food shopping.

Most aspects in this section show a lower importance ranking in 2013 than that assigned in 2011. Food shops, leisure facilities and free events/ entertainment each recorded improved satisfaction since the 2011 survey.

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)

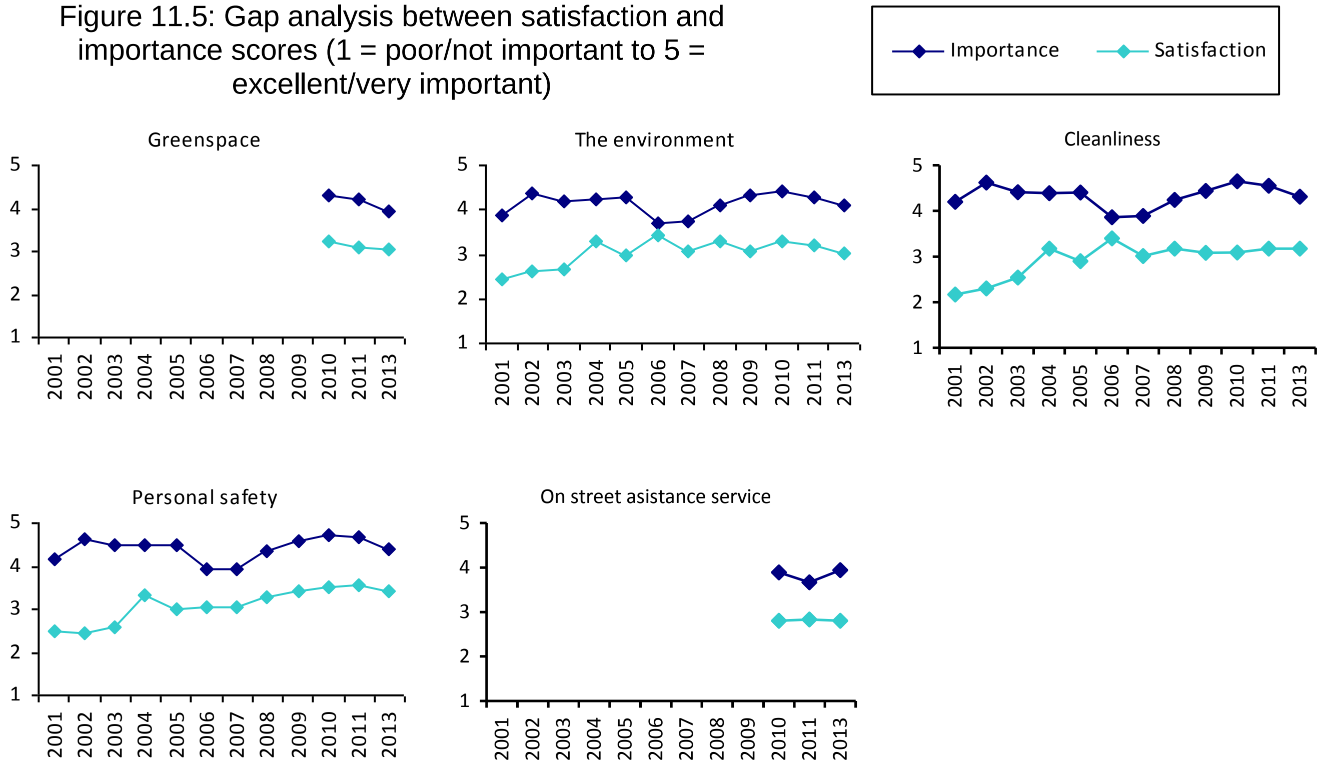


As already noted, good value parking charges within the city centre is the area with greatest disparity between importance and satisfaction in 2013. This gap is less wide than in 2011 as a result of both a drop in level of importance and slight increase in satisfaction since the previous survey but this remains the aspect where improvement is most needed.

Pedestrian access, car access, ease of parking and proximity of parking to work/shops, meanwhile, are all showing a narrowing of the gap since 2011, mostly due to the importance assigned to all these aspects being at a lower level.

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)

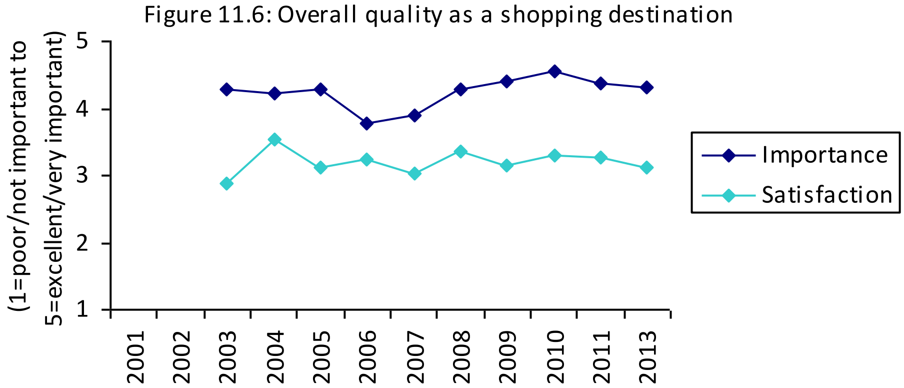


On-street assistance (including evening security patrols) is an aspect of the city centre that has seen a rise in importance since 2011, however there has been little change in satisfaction meaning this is identified as one of the areas where improvement is most needed.

Cleanliness has seen a drop in importance but levels of satisfaction have been gradually improving, narrowing the gap between the measures since 2010. Green space, the environment and personal safety are all areas of provision within the city centre where ranking of both importance and satisfaction have declined since the 2011 survey.

5.11.4. City Centre Overall Quality

Figure 11.6: Overall quality as a shopping destination



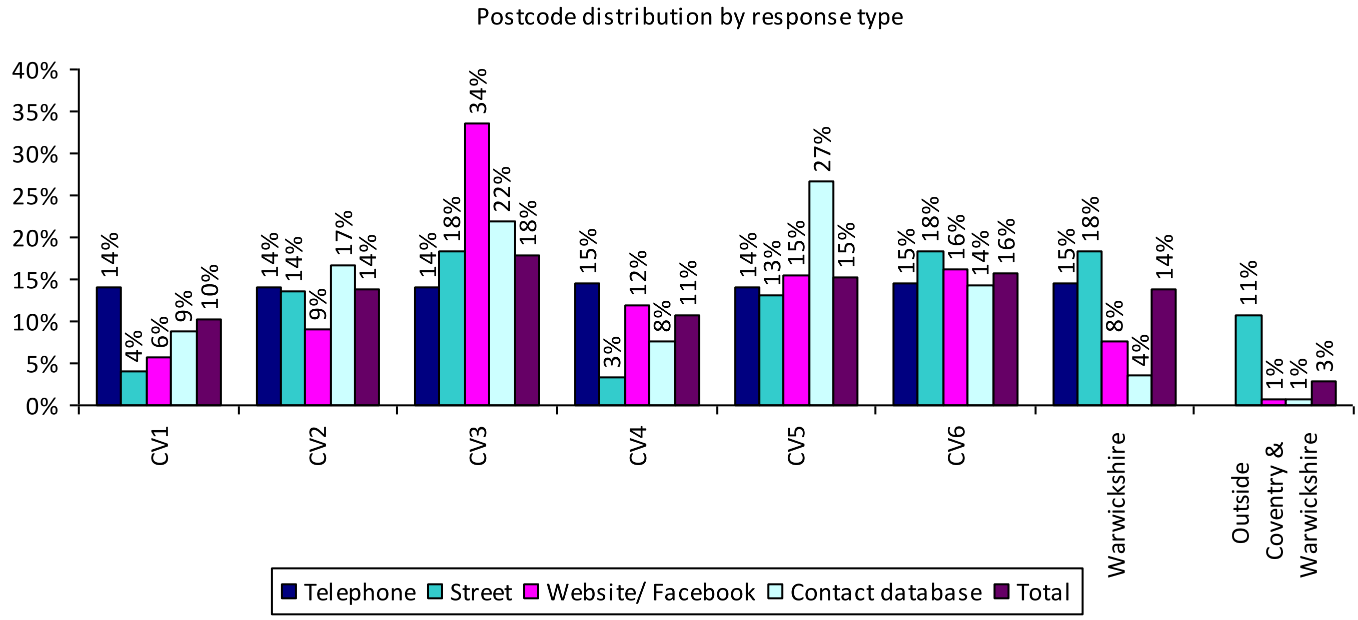
Since 2010, respondents have considered ‘overall quality as a shopping destination’ to be slightly less important as an aspect that creates a city centre they would want to visit. However, over this same time, people have also been showing reduced satisfaction with Coventry City Centre in terms of this aspect, meaning the gap remains significant and suggesting expectations are not being met.

Appendix 1. Demographic Profile

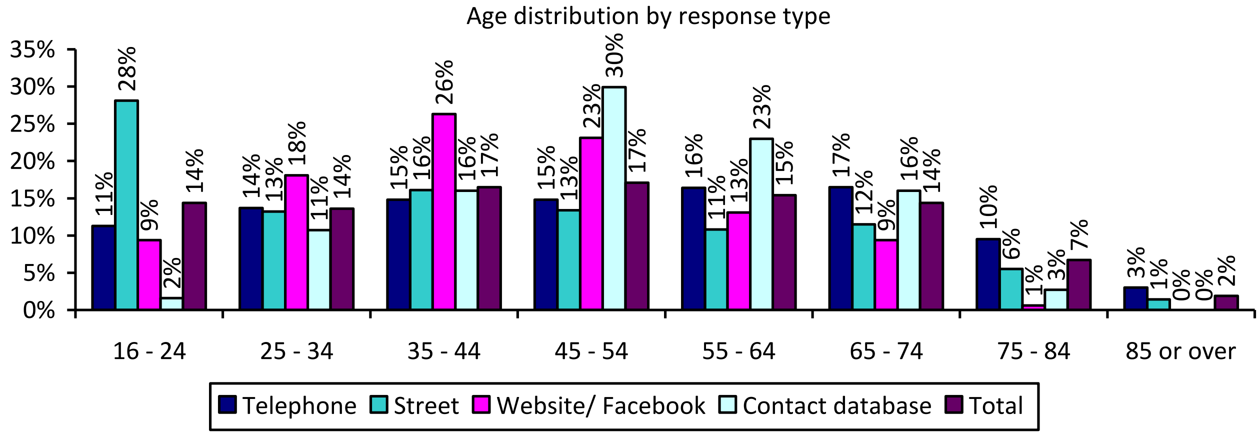
Respondents were asked to give demographic information including postcode, age, gender, occupation, household composition and car ownership.

83% of respondents had a CV1 to CV6 postcode, with each of the six Coventry postal code areas producing sample sizes of between 10% and 18% of respondents (N.B. The telephone survey was organised by quota to ensure an even spread of response from different postcode areas).

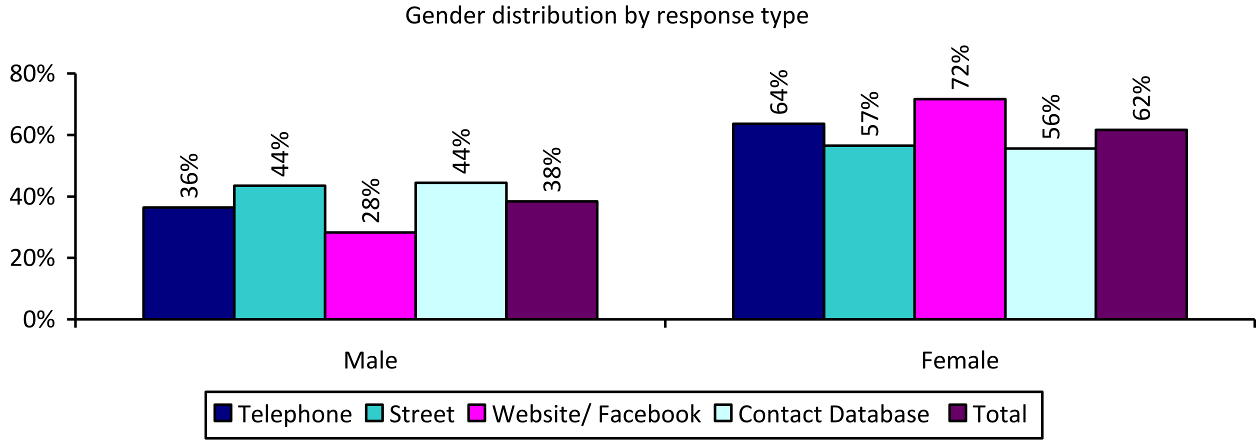
17% of respondents were resident outside Coventry, most of these being individuals with a Warwickshire (other CV) postcode. Over a quarter of those interviewed face-to-face in the city centre (29%) were visiting from postcodes outside CV1 to CV6.



Overall, response by age was fairly evenly spread for all age groups up to 75 and a third of responses came from the 35-54 age group. In terms of age distribution across the four collectors, the telephone survey achieved the most evenly distributed sample. The street survey achieved a good response from those aged 16-24, the website/ Facebook achieved a high representation from those aged 35-44 and, by emailing the Corporate Research contact database, there was good representation from those aged 45-54.

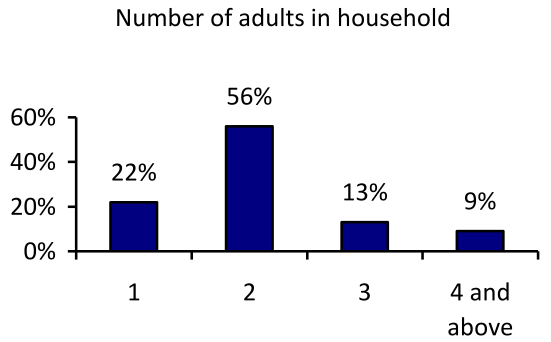


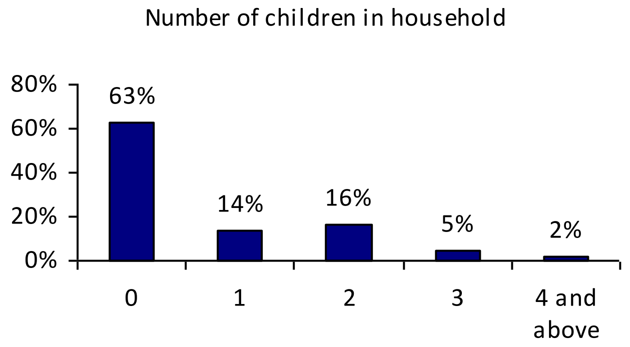
Profile of gender revealed 62% of respondents were female, 38% male. A greater proportion of people taking part in the survey via the website/ Facebook were females compared to males (72% compared to 28% respectively). Men were most likely to access the survey via the email sent to the contact database or via a street interview (each with 44% male response).



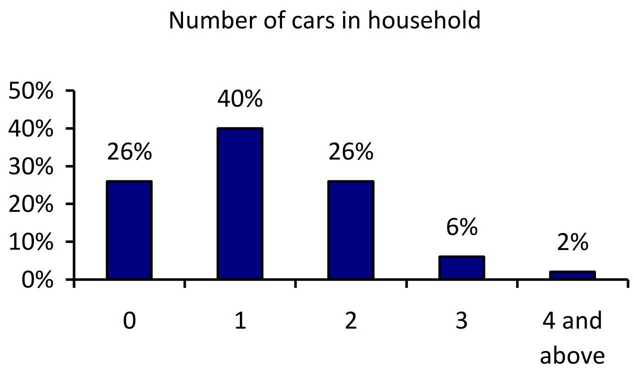
Just over half of the sample reported that they lived in a two adult household (56%). 22% were the sole adult at home while 9% were part of households comprising of 4 or more adults.

The majority of respondents were from a household with no children (63%) while 37% had one or more children living with them.

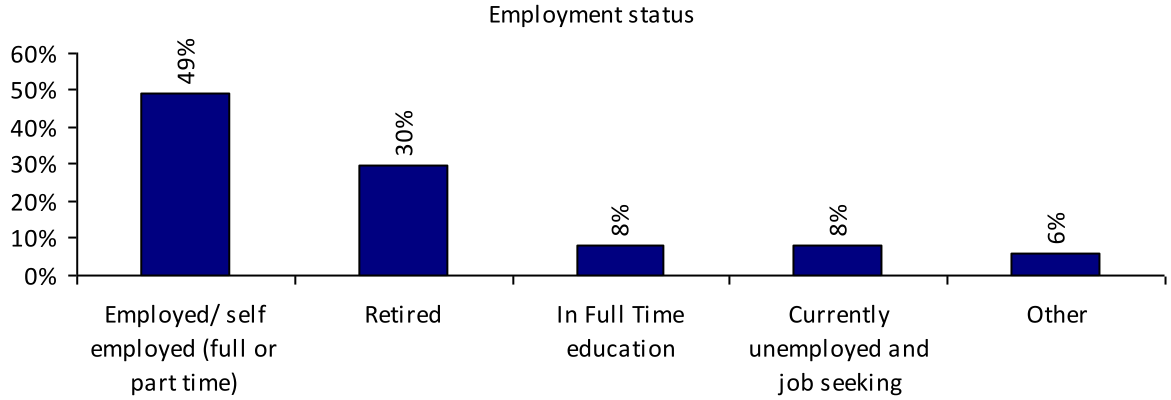




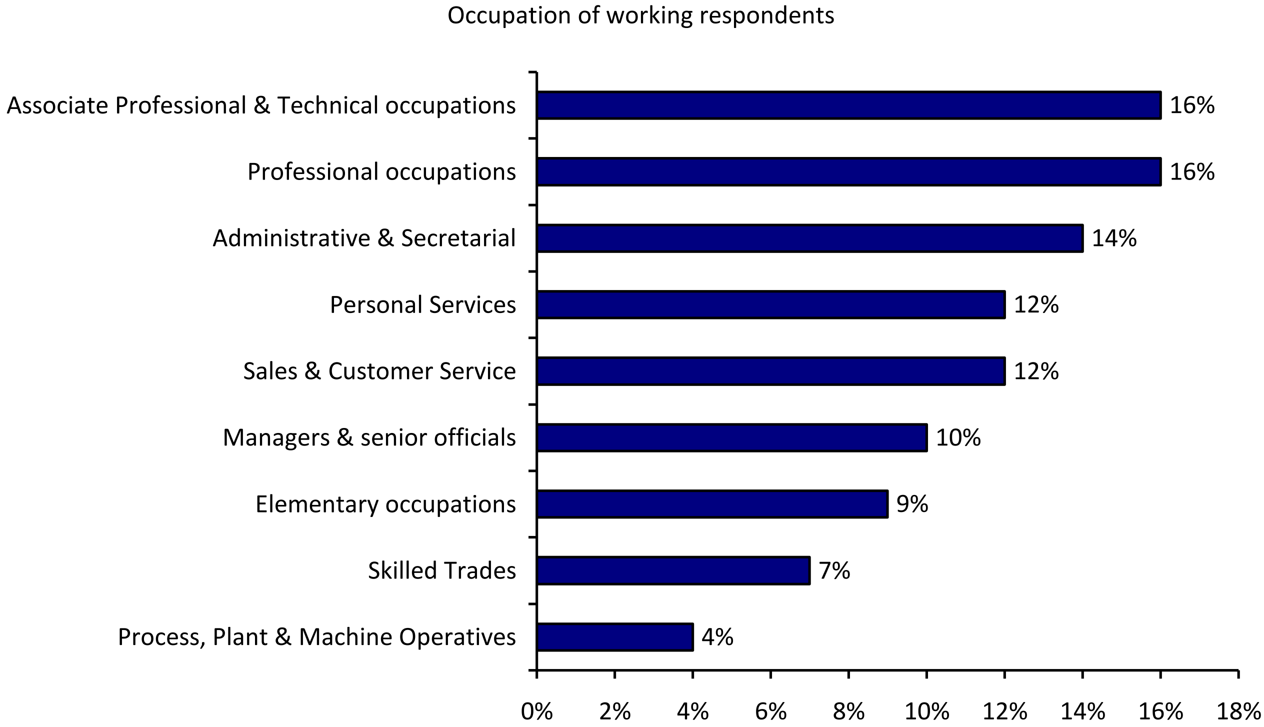
Most people surveyed had access to at least one vehicle but 26% of the sample came from a household without a car



Breakdown of the sample by occupation revealed that, overall, 49% of respondents were currently in paid employment, 30% were retired, 8% were full-time students and 8% were unemployed job seekers. Those replying 'other' mostly specified that they were full-time housewives, parents or carers or that they were unable to work due to ill health/ disability.



Amongst employed respondents, Associate Professional/ Technical occupations and Professional occupations were the most common employment sectors reported (16% respectively) followed by those working in administrative roles (14%).



Appendix 2. 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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