Coventry City Centre Survey 2015

Insight

December 2015

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 2015 survey saw the continued fall in frequency of visits to the city centre and the proportion of respondents who said that Coventry City Centre was their main centre for non-food shopping. Coventry City Centre continues to see high competition from Arena Park, Birmingham, Leamington Spa and Solihull centres both in terms of an alternative and additional shopping centre. Although visitors were seen to be visiting less often, spend levels were back to those previously see before the recession.

Despite the relative fall in non-food shopping visits, levels of visits for other reasons (such as eating and drinking out, leisure and sport) and evening visits (restaurants, cinema, pubs and theatre) had risen in recent years.

The previous 2013 survey saw worrying levels of safety perceptions in the evening. The 2015 survey returned to general levels previously seen before the 2013 survey, although slightly worse than levels seen between 2007 and 2011.

Events continue to play an important role in changing perceptions, increasing spend and dwell time and stimulating visits to the city centre. Over the last 12 months the Christmas Market, the Farmers Market and the Christmas Lights Switch-on were popular events in the city centre. The BID was also seen to encourage visits, spend and dwell time through the summer events and VIP scheme.

Perception analysis of levels of importance and satisfaction of service provision in the city centre show that personal safety and cleanliness are services that visitors place highest importance on. Overall quality of the city centre as a shopping destination, cleanliness, non-food shops and environment/ surroundings were seen to have the widest gap between levels of importance and levels of satisfaction. The city centre had the narrowest gap between importance and satisfaction levels for general areas of city centre offer (excluding non-food shopping) and access (excluding good value parking charges).

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 2015 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. 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.

4. 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.

5. 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

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

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

8. 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 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 2015 face-to-face interviewing was carried out during August-September 2015. Interviews were carried out around Broadgate and Upper Precinct in the city centre.
>
> 480 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 August-September 2015, conducted at different times during the week/weekend and daytime/evening to ensure demographic range and diversity.
>
> 269 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 Insight Team's contact database (local residents who have expressed an interest in taking part in council surveys and consultations).
>
> 429 responses were received online, 237 from contact database members and 192 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 1,178 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 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 1,178 from a total population of 337,400 equates to a margin of error of no more than plus or minus 2.85% 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)*

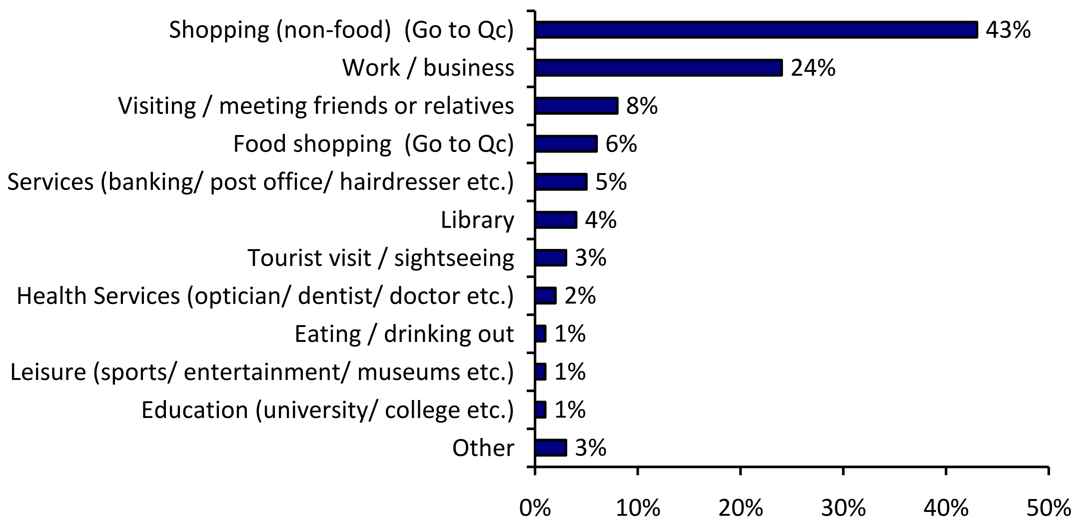
5. Data Analysis and Results

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 480.

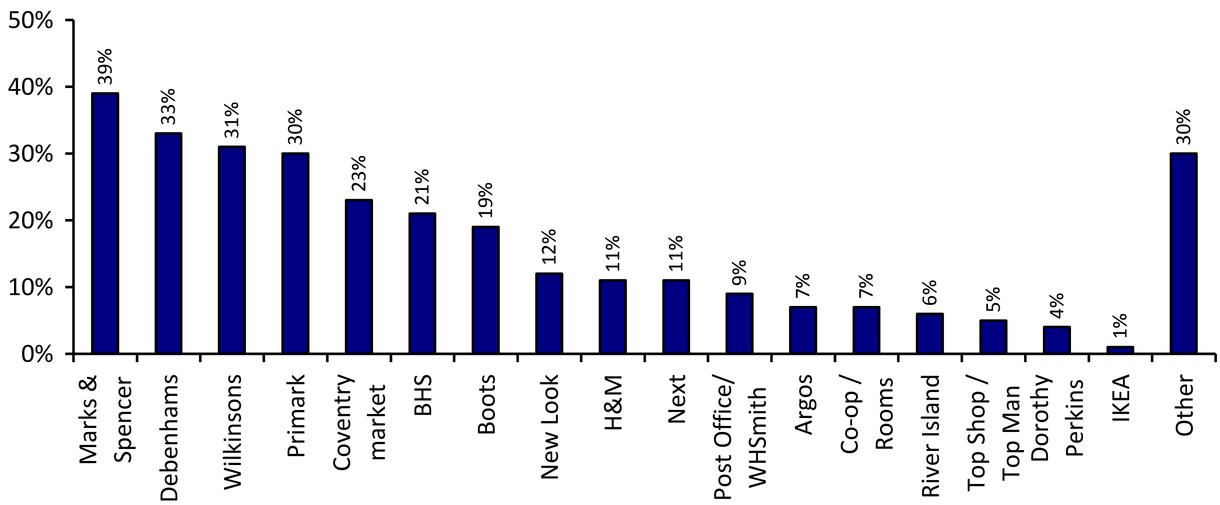
Respondents most commonly cited non-food shopping as their main reason for visiting Coventry City Centre on the day they were surveyed (43%), followed by 24% of the sample who were visiting for work or business

Figure 1.1: Main reason for visiting Coventry City Centre



54% 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 Marks & Spencer, Debenhams, Wilkinsons and Primark were the most popular locations (39%, 33%, 31% and 30% 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.

43% of respondents were classified as frequent users, visiting the city centre once a week or more often for shopping. 34% 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, 18%) and those who never visit the city centre for shopping (5%).

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

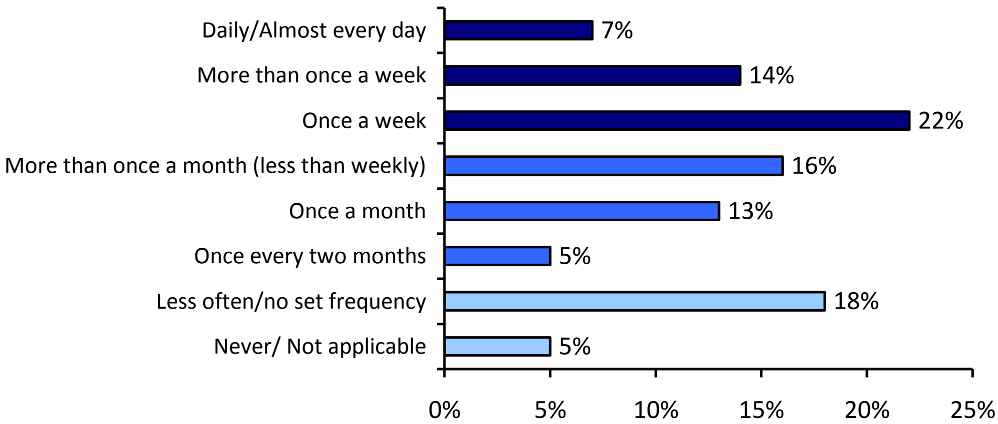


Figure 2.2 shows, on a scale of 1 being never and 9 being daily, the trend analysis of average frequency of visits to the city centre. Frequency of city centre visits for shopping has continued to fall below an average of 6 since 2009, suggesting negative effects of the recession on visitor patterns.

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

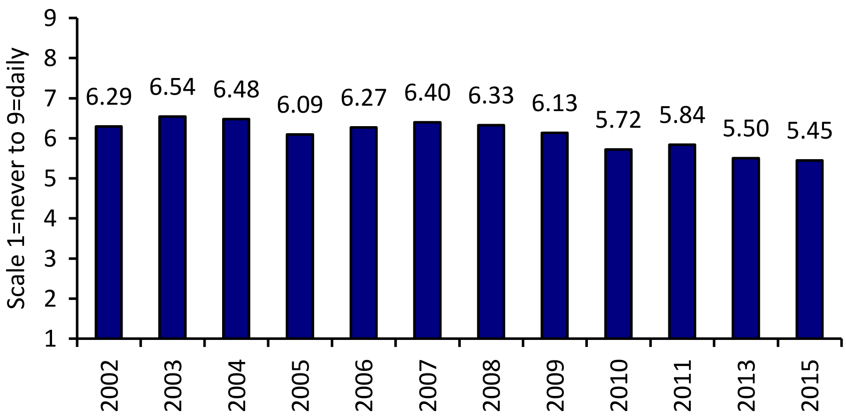
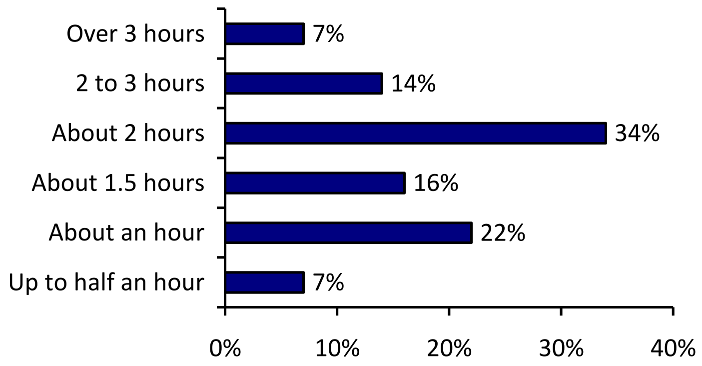


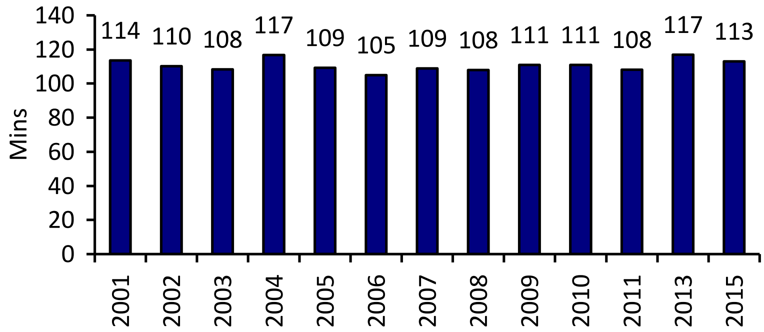
Figure 2.3 shows how long shoppers said they generally spend in the city centre per visit. This illustrates that the most common length of visit was about two hours (34%), 21% spend over two hours in the city centre on a typical trip and 29% tend to spend one hour or less per visit.

Figure 2.3: Typical length of time spent shopping in the city centre per visit



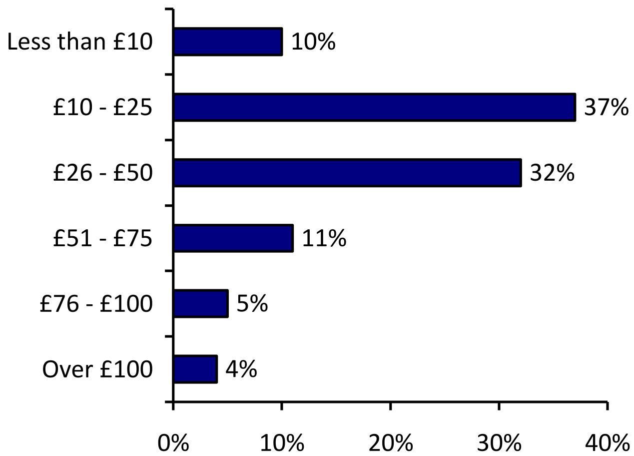
The mean duration of visit was calculated and respondents reported spending 113 minutes in the city centre on a typical shopping trip.

Figure 2.4: Average length of time spent shopping in the city centre per visit - trend



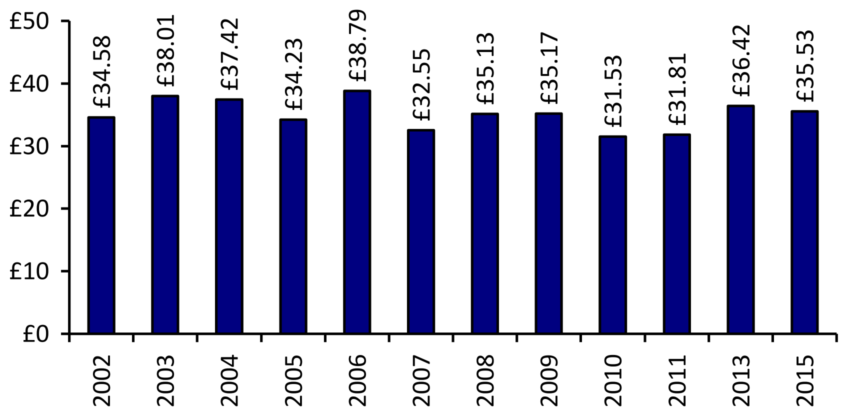
Asked for the amount they spent on a typical shopping trip in Coventry City Centre, respondents who shop there most commonly reported spending between £10 and £25 (37%) or between £26 and £50 (32%) per trip.

Figure 2.5: Typical spend per visit



The mean reported spend per head in 2015 on a typical trip was £35.53. This is a slight fall on the 2013 survey, but higher than previous lows during 2010 and 2011.

Figure 2.6: Average spend per visit - trend



Respondents who 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 (54%) and choice of shops (34%).

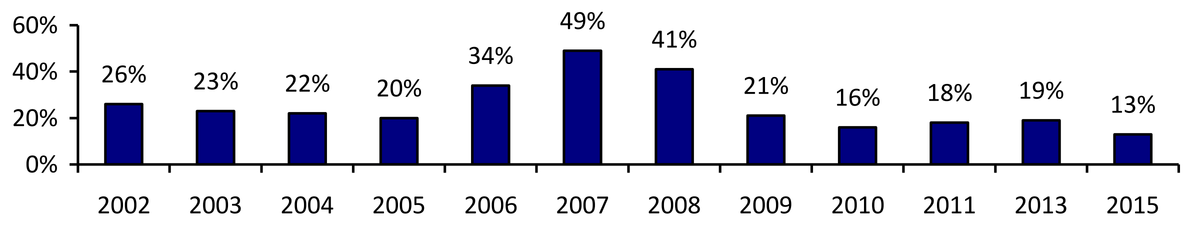
Figure 2.7: Main reason for choosing Coventry City Centre for shopping trip

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.

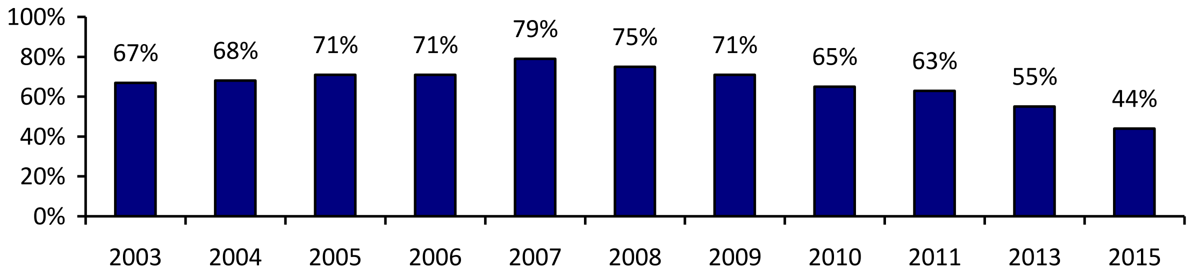
Only 13% of those surveyed said that they normally did their main food shopping in Coventry City Centre.

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



The proportion of respondents who said Coventry was their main centre for non-food shopping has fallen drastically since 2007, from 79% to only 44%.

Figure 3.2: Coventry City Centre is main centre for non-food shopping - trend



Arena Park, Birmingham, Leamington Spa and Solihull were popular shopping destination for both those who used Coventry City Centre as their main centre and those who didn't. Solihull was seen to be more popular as an alternative to Coventry City Centre, whereas the Arena Park and Birmingham were more popular as an additional centre. A quarter of those respondents who said Coventry City Centre was their main centre for non-food said they didn't shop anywhere else.

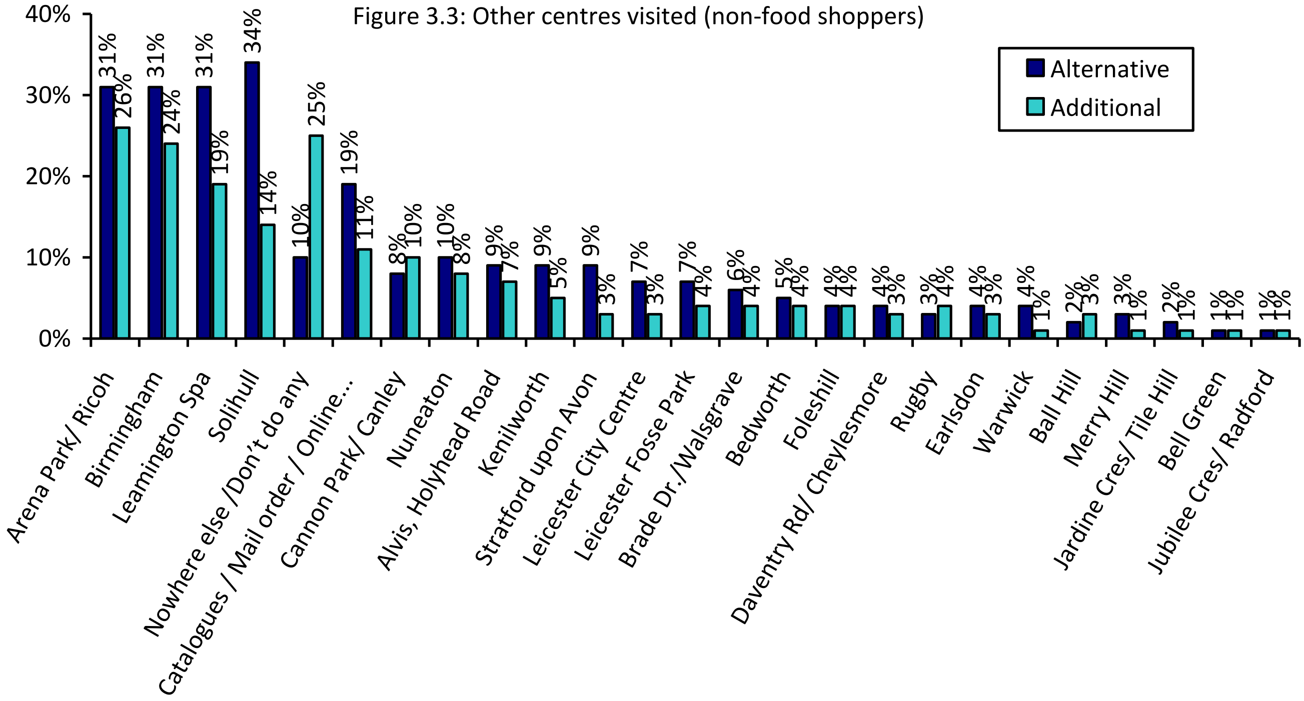
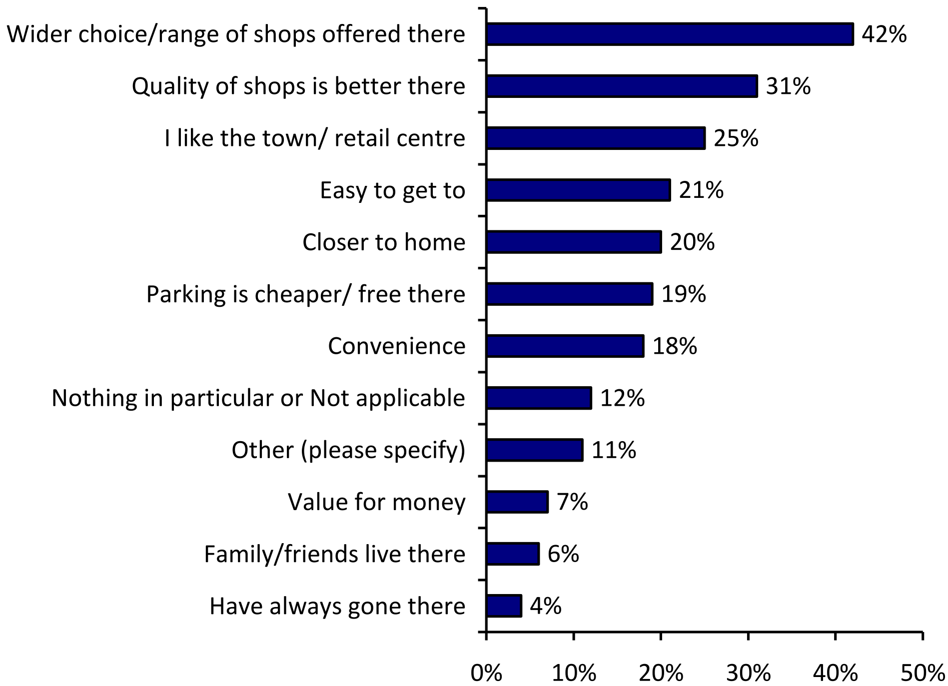


Figure 3.3: Other centres visited (non-food shoppers)

5.4. 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 wider choice and range of shops on offer at alternative centres (42%).

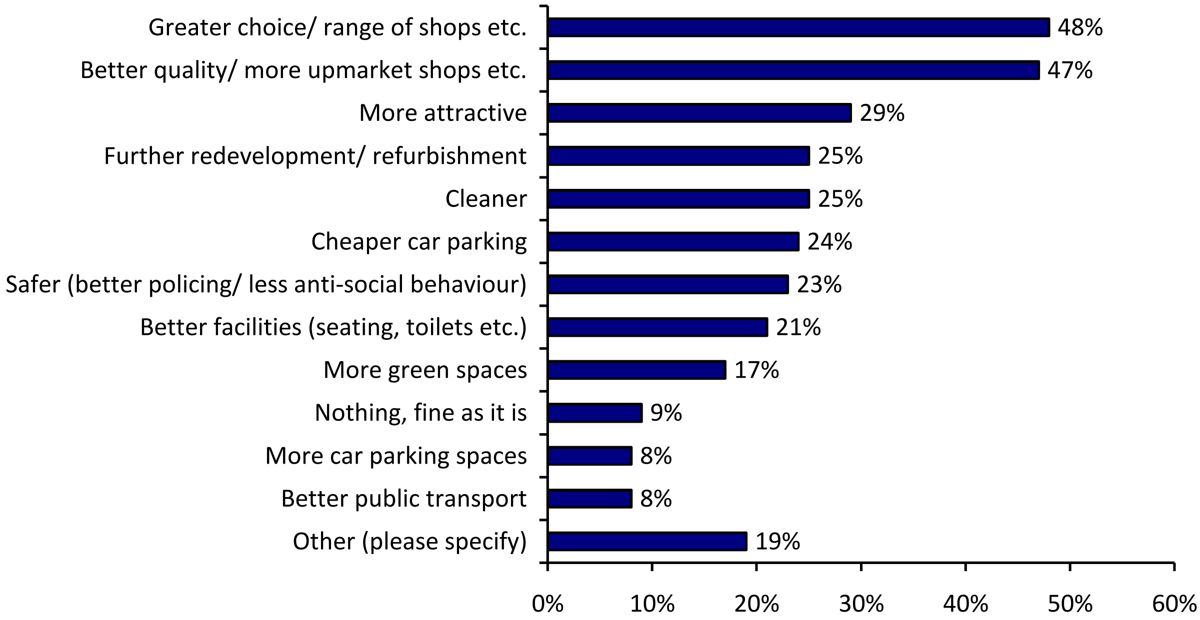
Figure 4.1: If you ever do non-food shopping outside Coventry City Centre, what mainly influences your decision of where to go?



5.5. Improvements to Coventry City Centre and shopping offer wishlist

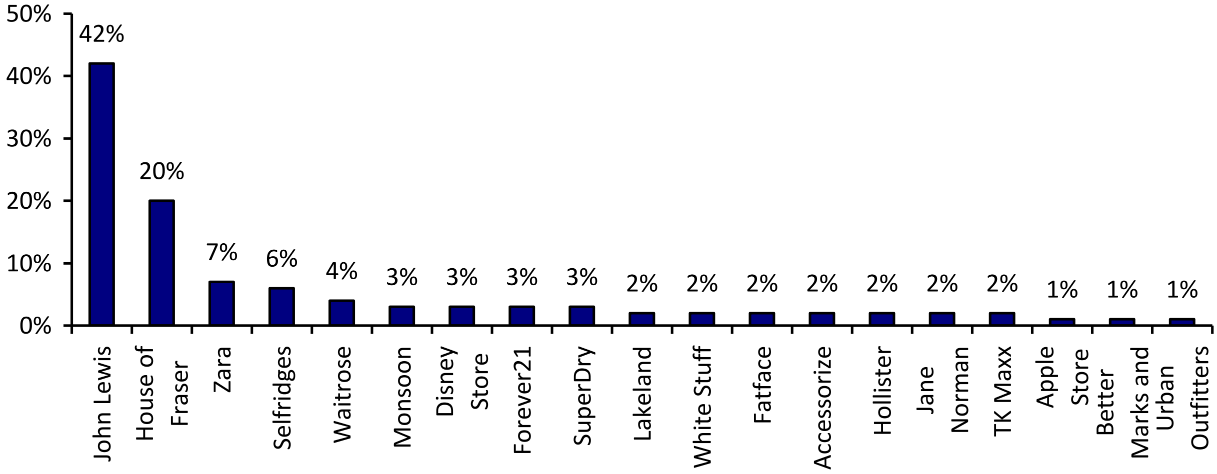
Respondents were asked what improvements they would like to see made to the city centre. Their unprompted responses were grouped into categories as shown in fig.5.1. As in previous years greater choice of shops (48%) and better quality shops (47%) were the most common requests for improvement.

Figure 5.1: What would you change to improve Coventry City Centre



When questioned about which new brands respondents would like to see in the city centre, 69% of respondents made at least one request. Fig. 5.2 shows the most popular brands requested. John Lewis is clearly still the most sought after store, followed by House of Fraser.

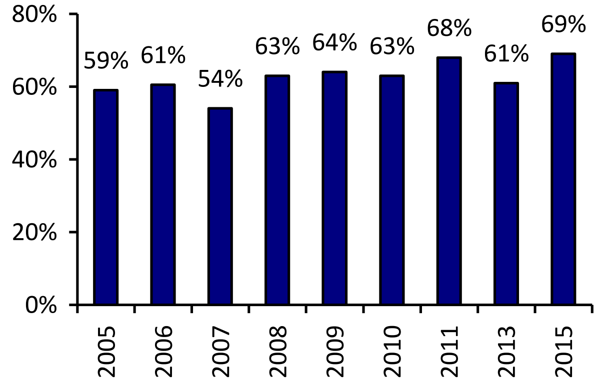
Figure 5.2: Brands requested (% of respondents making suggestions)



5.6. Other uses of Coventry City Centre

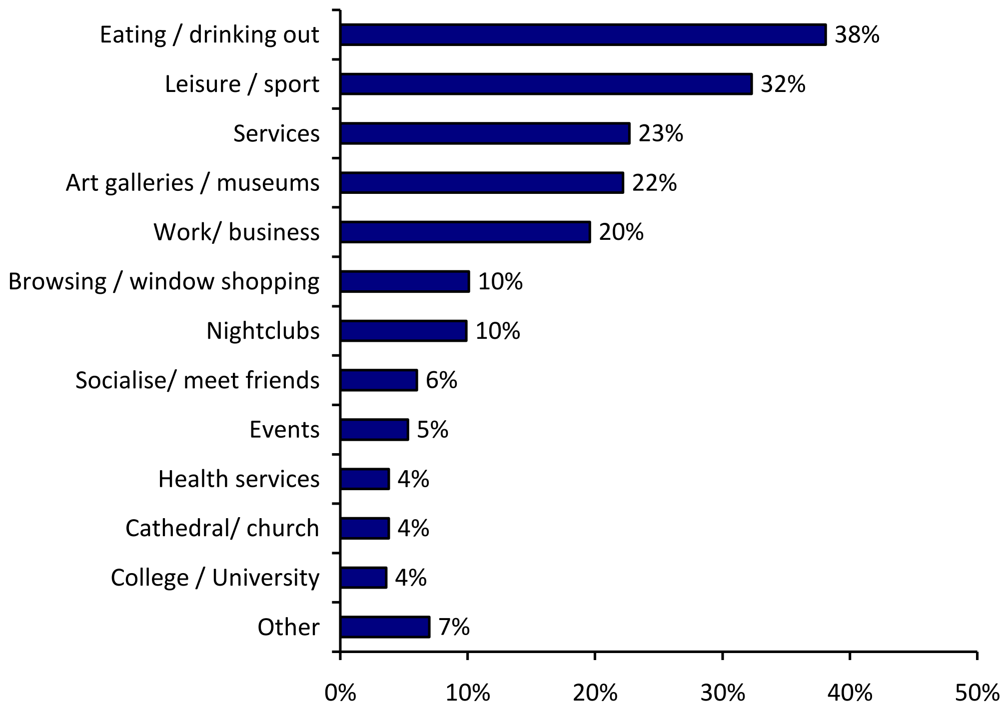
69% of respondents indicated that they use the city centre for reasons other than shopping.

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



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

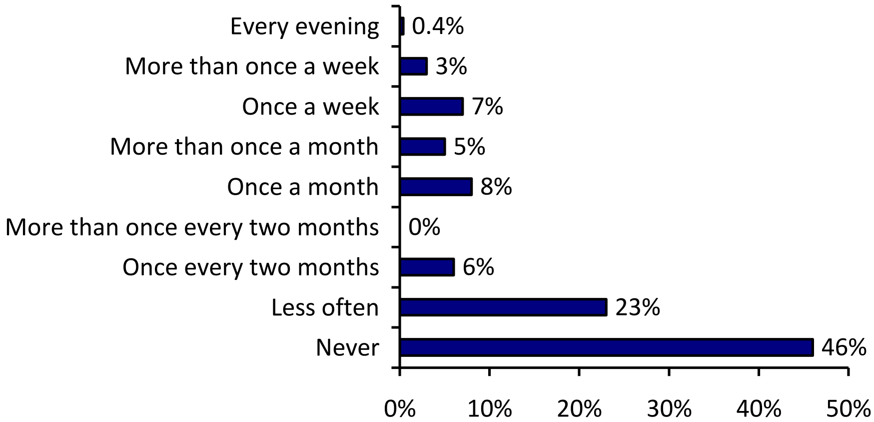


5.7. Evening Visits

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.

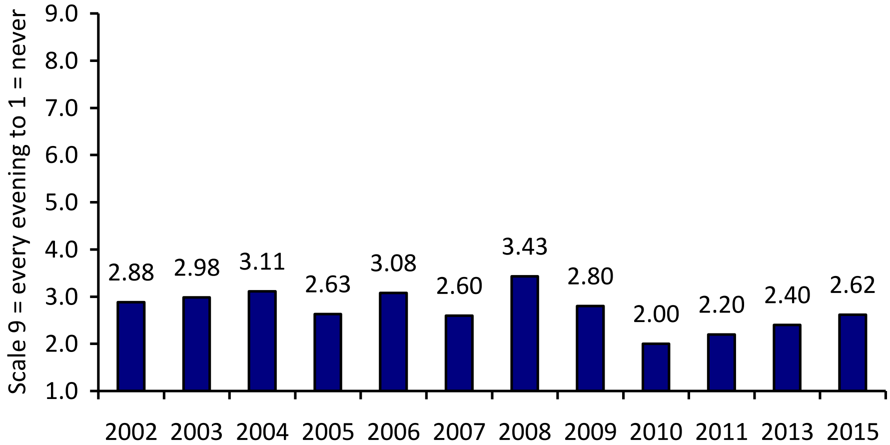
Overall, 54% of the sample reported that they visited Coventry City Centre in the evening, 10% visiting in the evening at least once a week. 46% said that they never visited the city centre in the evening.

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



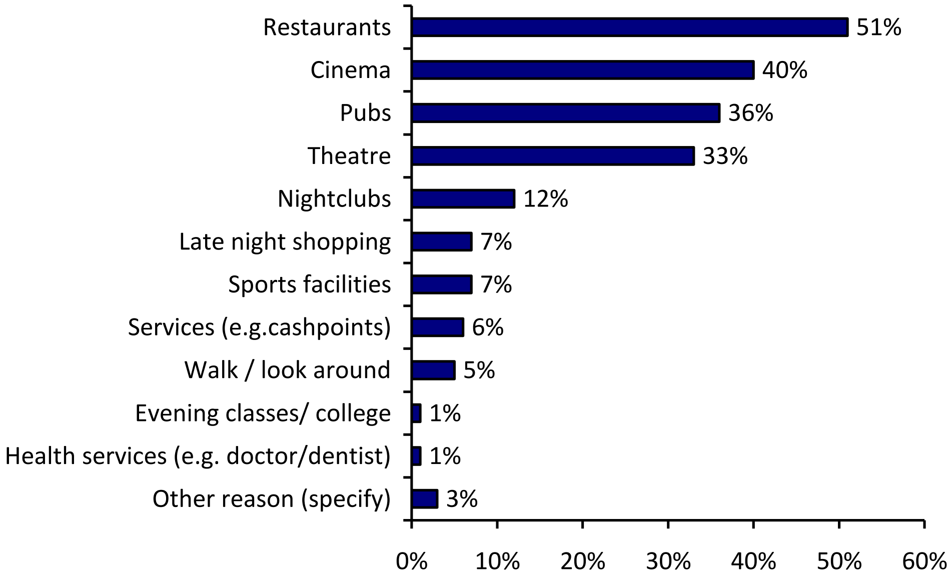
On a scale of 1 to 9, where 1 is never and 9 is every evening, average frequency of visits in the evening has increased very slightly over the last five years.

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



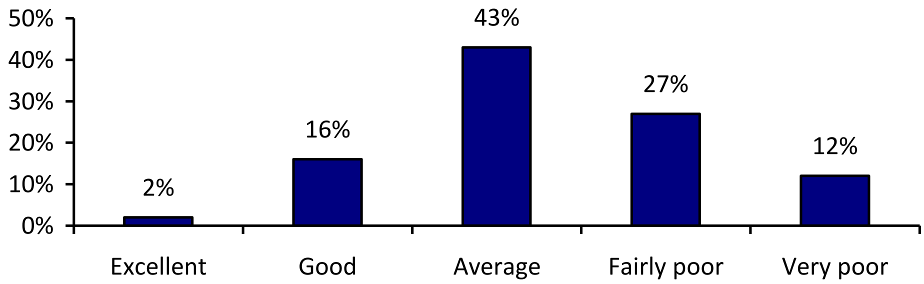
The most common reasons given for visiting Coventry City Centre in the evening were to visit restaurants (51%), cinema (40%), pubs (36%) and theatre (33%).

Figure 7.3: Reasons for visiting Coventry City Centre in the evening (% of evening visitors)



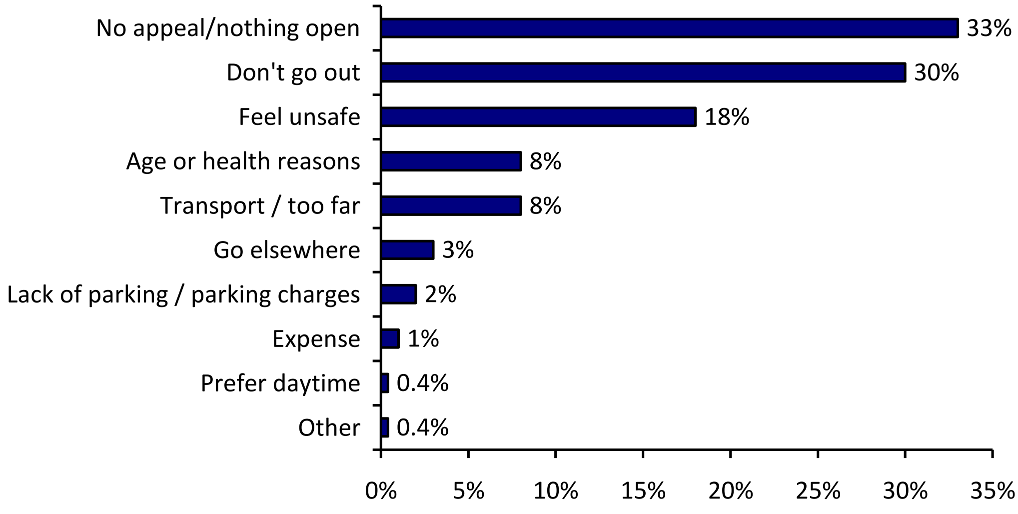
Respondents who visited the city centre in the evening were asked for their impression of the city centre at this time. Most evening visitors (43%) rated it as average, 39% thought it fairly or very poor and 18% gave an excellent or good rating.

Figure 7.4: Overall impression of Coventry City Centre in the evening

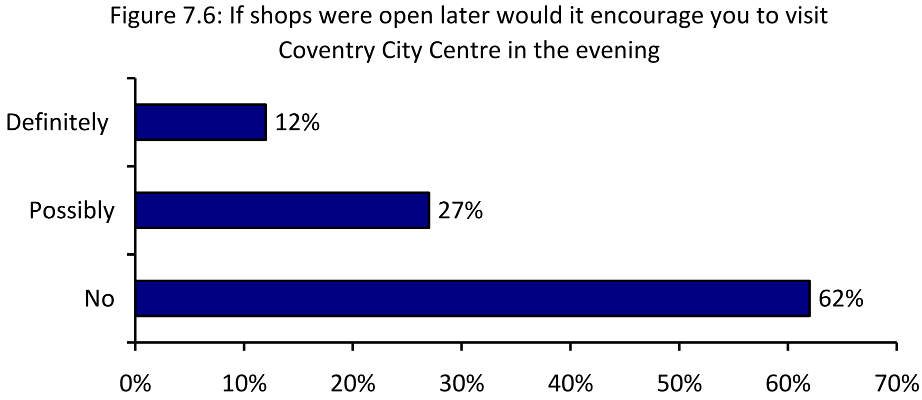


The majority of respondents who did not visit the city centre during the evening said that this was largely due to a lack of appeal/ nothing being open, them not going out or not feeling safe.

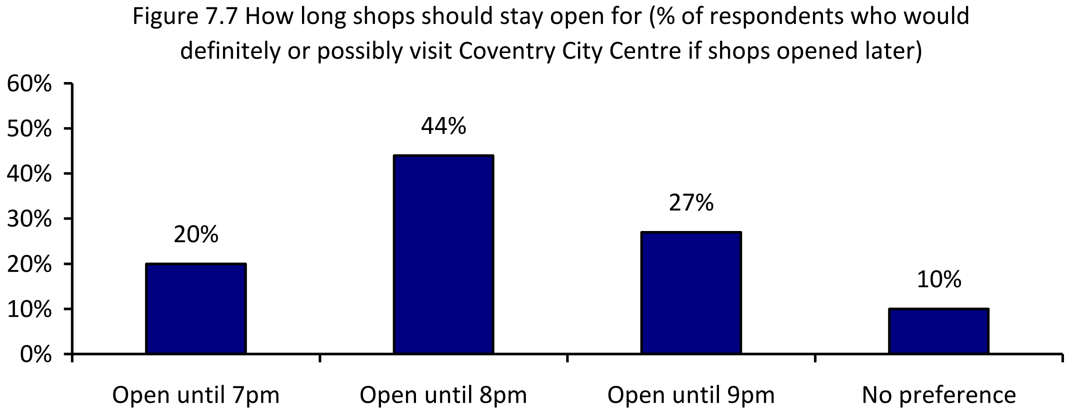
Figure 7.5: Reasons for not visting Coventry City Centre in the evening



Respondents were asked if they would be encouraged to use Coventry City Centre during the evening if the shops were open later, to which 38% indicated that they would and 62% said no.



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 (44%), followed by 27% who said that they would prefer the shops to stay open until 9pm.

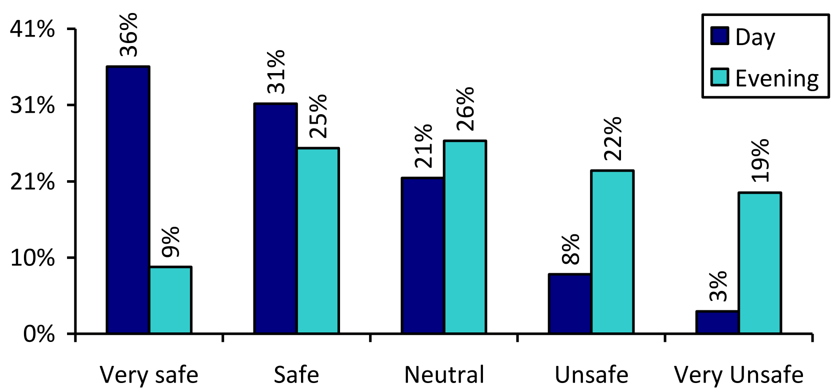


5.8. Perceptions of Safety

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.

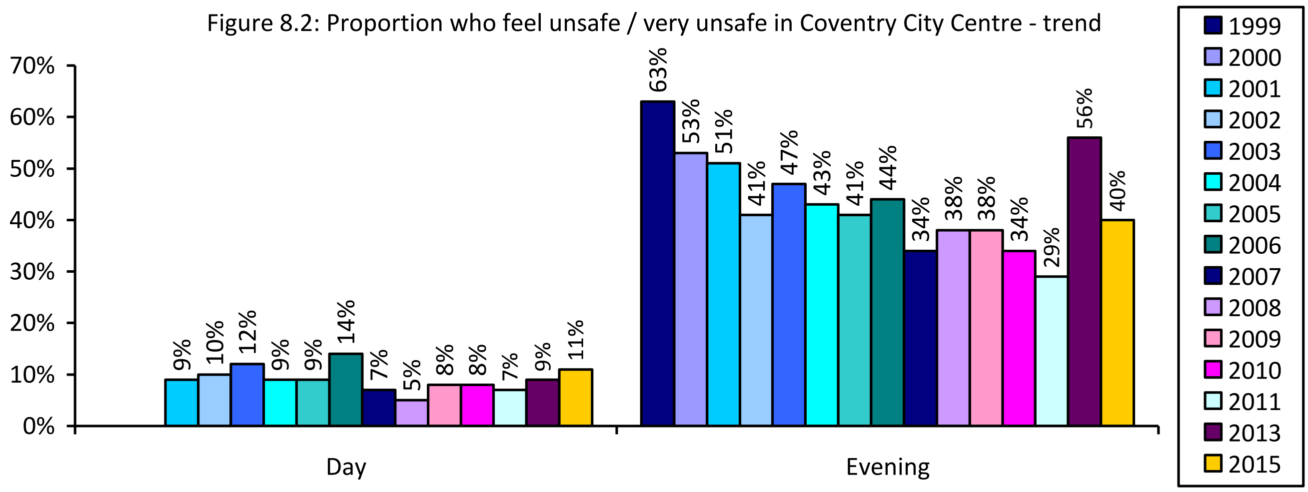
Figure 8.1 illustrates the difference in respondents' feelings of safety during the daytime and at night. There is a marked difference between daytime and evening safety perceptions with only 11% of respondents feeling unsafe or very unsafe during the day, compared to 40% in the evening.

Figure 8.1: Feeling of safety during day and evening



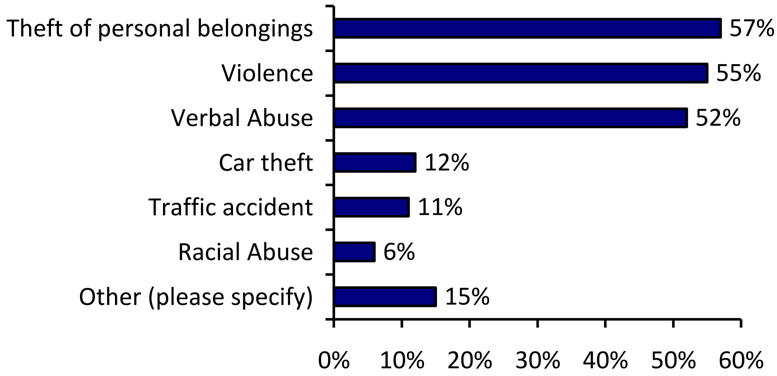
Time analysis of safety concerns within the city centre show that, up to 2011, the proportion feeling unsafe in the evening had more than halved since the survey began in 1999. However, this figure almost doubled in 2013 to 56% and has fallen again to 40% in 2015. The small proportion of respondents feeling unsafe during the daytime has remained relatively low.

Figure 8.2: Proportion who feel unsafe / very unsafe in Coventry City Centre - trend



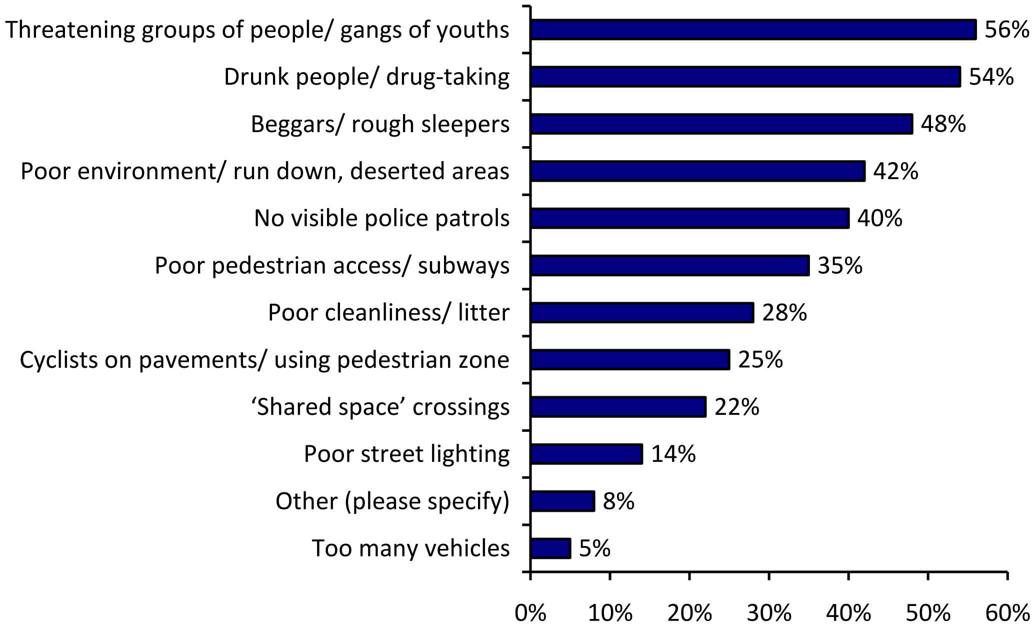
Amongst those who felt unsafe, the main fears reported were theft of personal belongings (57%), violence (55%) and verbal abuse (52%).

Figure 8.3: Type of threat respondents feel at risk of (% of respondents ever feeling unsafe)



56% 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, 54% 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 48%.

Figure 8.4: Visible aspects that make you feel unsafe (% of respondents ever feeling unsafe)



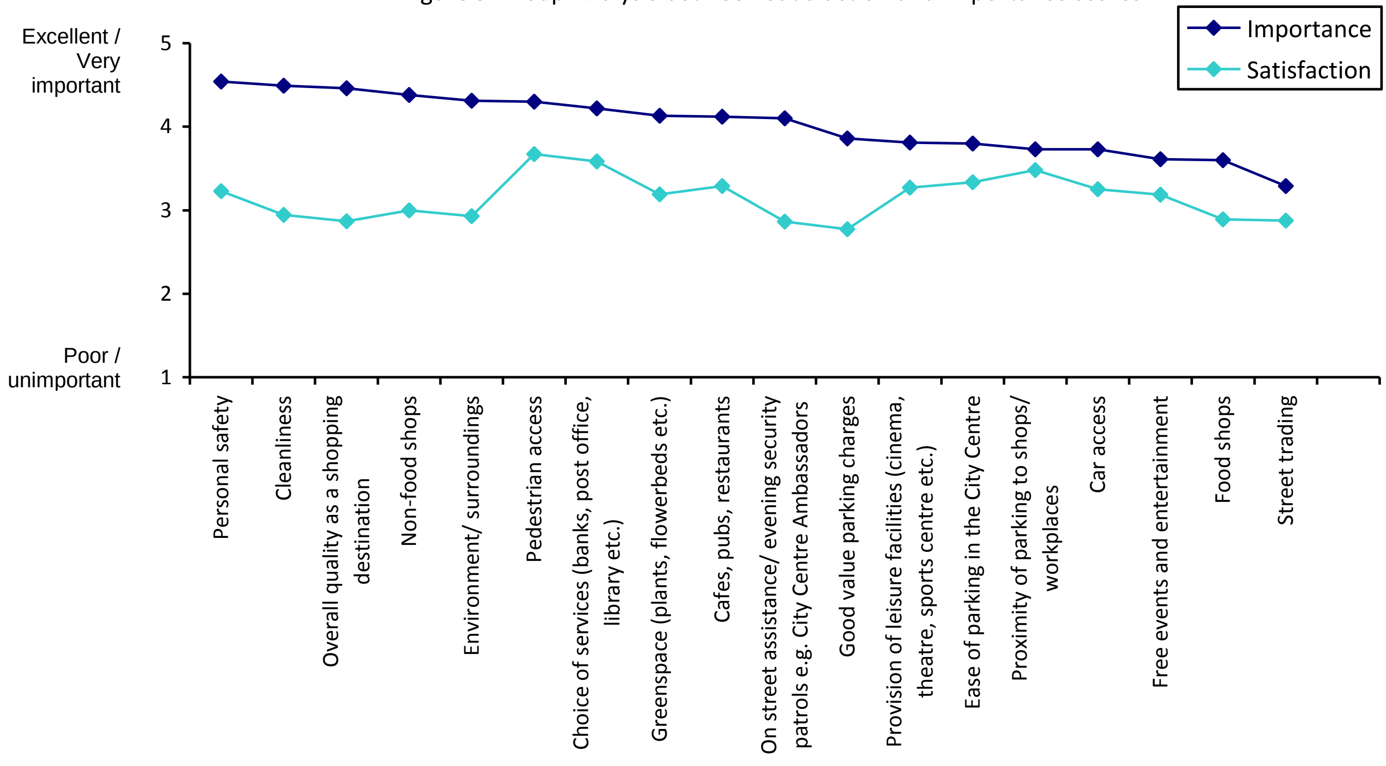
5.9. Perceptions of Coventry City Centre

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. 9.1 (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 overall quality as a shopping destination, cleanliness, non-food shops and environment/ surroundings.

Figure 9.1: 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 9.2 highlight which aspects respondents deemed as very important that they reported finding either very satisfactory or unsatisfactory. This year no services fell into the grey area.

Figure 9.2: Strong areas of provision and areas requiring attention:

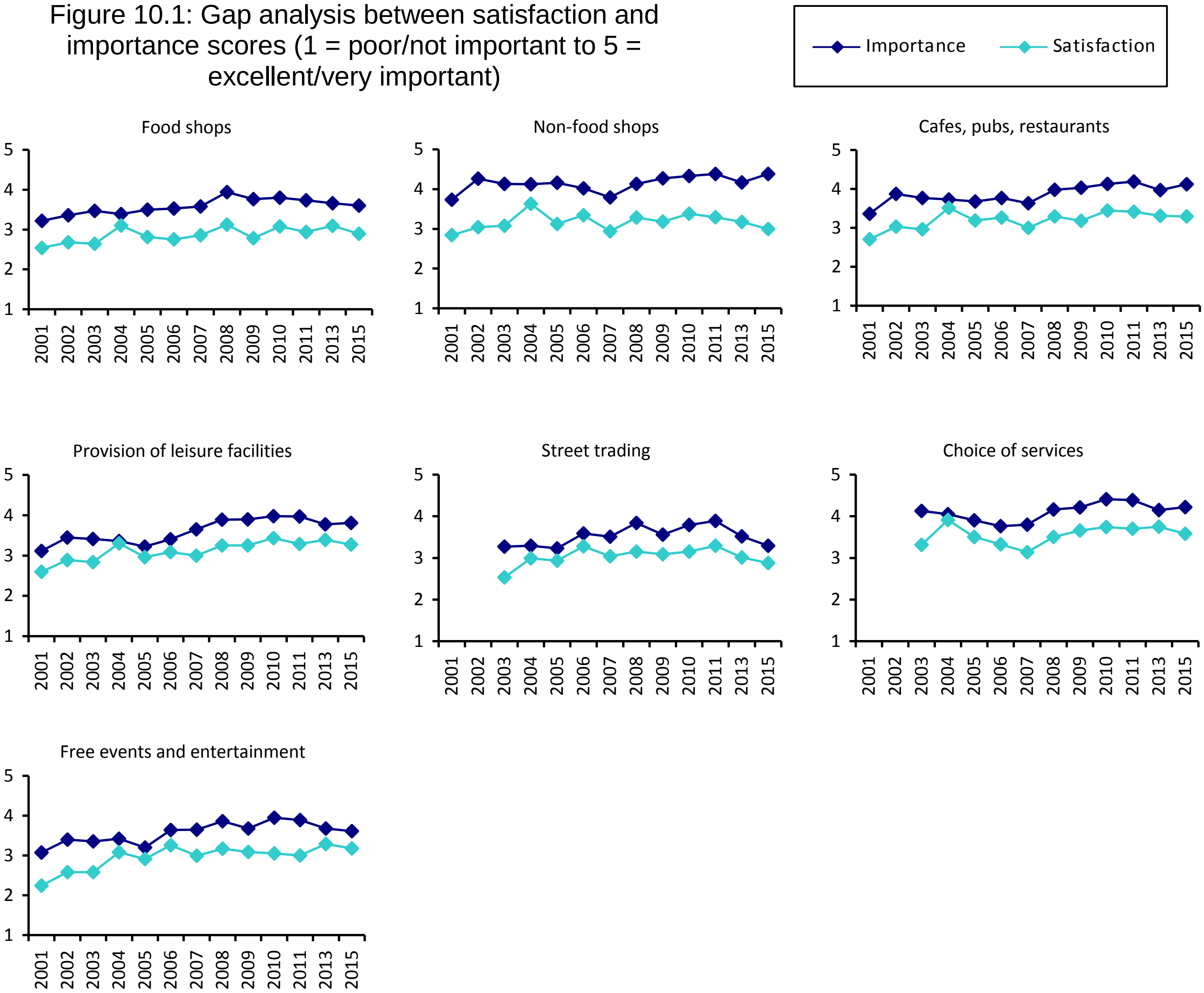
	Very Unsatisfactory	Unsatisfactory	OK	Satisfactory	Very Satisfactory	
Very Important	**E**	**D**	**C** Personal safety; Greenspace (plants, flowerbeds etc.); Non-food shops; Cleanliness; Environment/ surroundings; Overall quality as a shopping destination; On street assistance/ evening security patrols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

5.10. City Centre Offer

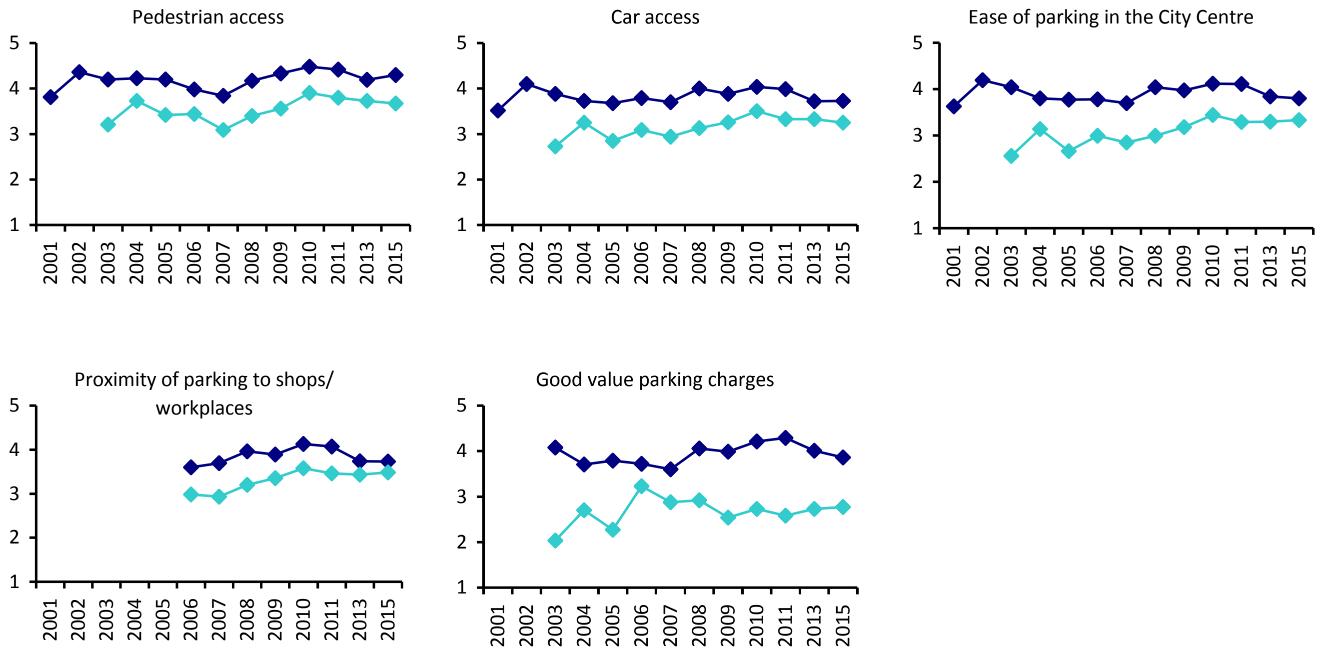
Figure 10.1: Gap analysis between satisfaction and importance scores (1 = poor/not important to 5 = excellent/very important)



Generally those attributes which fall under this section (the city centre offer) are areas of the city centre which perform the strongest, having the narrowest gap between the level of importance placed on these services and the level of satisfaction. The only exception is non-food shopping in the city centre, which has the 3rd largest gap between importance and satisfaction levels (having seen an increase in importance and fall in satisfaction in recent years).

5.11. City Centre Access

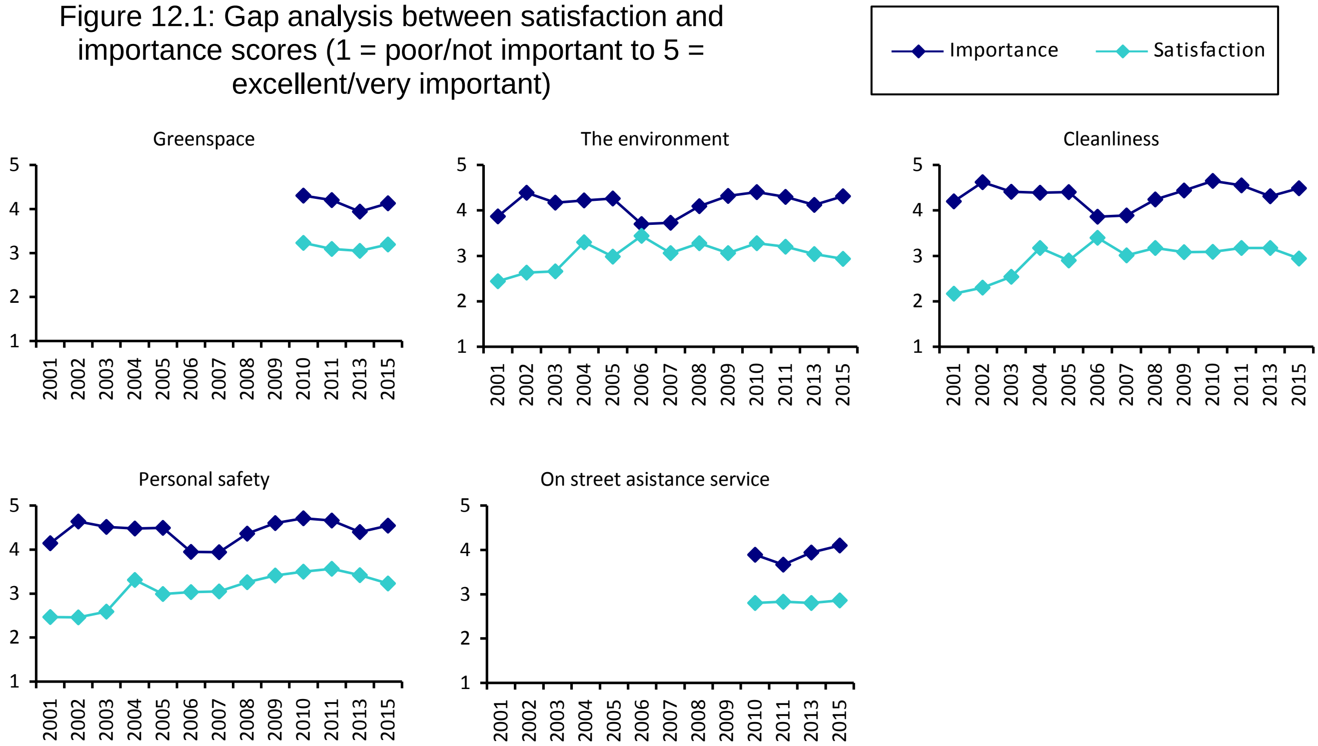
Figure 11.1: Gap analysis between satisfaction and importance scores (1 = poor/not important to 5 = excellent/very important)



With the exception of parking charges, the city centre performs generally well in terms of its access. Proximity of parking is an attribute of the city centre which has the smallest gap between levels of importance and satisfaction (i.e. meeting user's needs). Historically results from the survey have identified good value parking charges as one of its worst performing attributes, but this has improved slightly in recent years due to increasing levels of satisfaction and falling levels of importance.

5.12. City Centre Environment and Safety

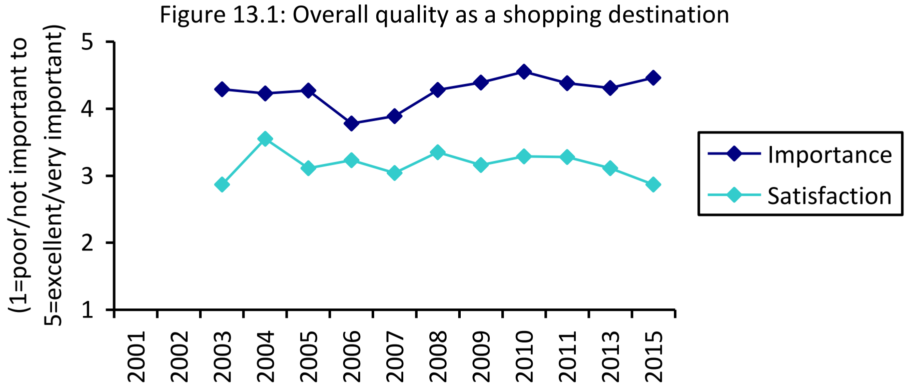
Figure 12.1: Gap analysis between satisfaction and importance scores (1 = poor/not important to 5 = excellent/very important)



In general the city centre environment and safety attributes perform the worst when compared to other aspects of the city centre (having the widest gap between importance and satisfaction). This is particularly the case for cleanliness, which has the second widest gap between importance and satisfaction.

5.13. City Centre Overall Quality

Figure 13.1: Overall quality as a shopping destination

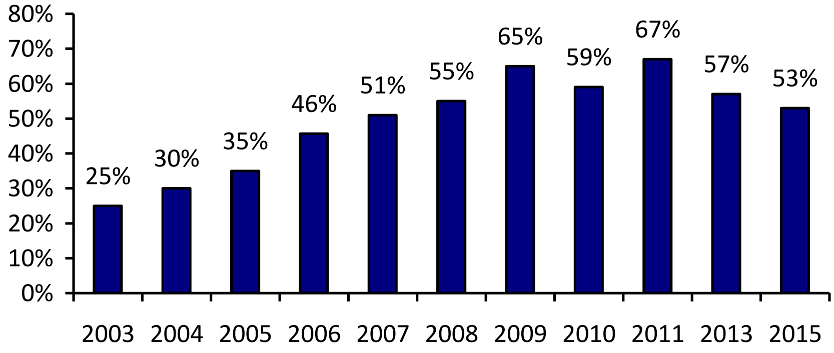


The overall quality of the city centre as a shopping destination has the widest gap between the level of importance and satisfaction, showing it to be the worst performing aspect of the city centre. Levels of satisfaction have fallen since 2010.

5.14. Events

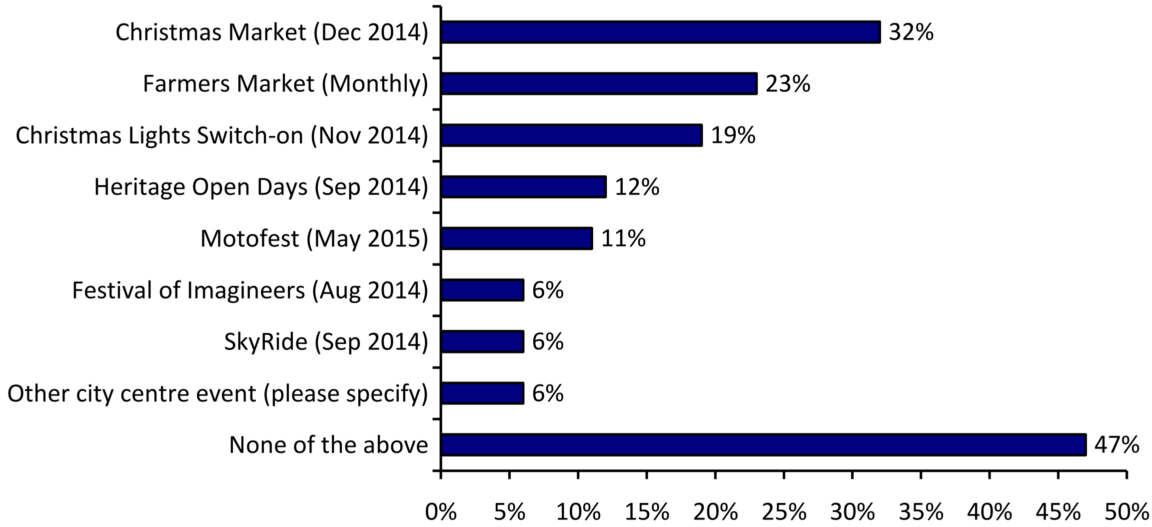
Asked about their attendance at city centre events over the previous twelve months, over half of respondents (53%) indicated that they had attended at least one organised event in the past year – this figure is down 14% compared to the 2011 survey.

Figure 14.1: Attended at least one city centre event - trend



Markets continued to be the most popular events. 32% had visited the Christmas International market (compared to 28% in 2013) and 23% of respondents had attended one or more of the monthly Farmers' markets (compared to 29% in 2013 and 35% in 2011). 19% had attended the Christmas Lights Switch-on, 12% had gone to the Heritage Open Days and 11% had attended the Motofest event.

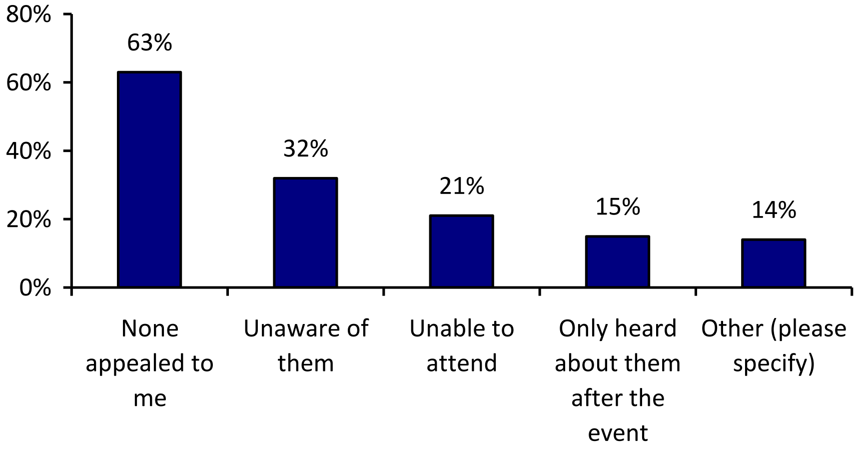
Figure 14.2: City centre event attendance



49% of event attendees said that they had visited the city centre more often, in general, as a result of event attendance (this compares to 55% in 2013 and 31% in 2011). This underlines the importance of city centre events for changing visitor perceptions of the city and increasing footfall.

The 47% 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. 63% of non-attendees said none of the events had appealed. The next most common reason (accounting for 32% of respondents) said that they were not aware events were being held.

Figure 14.3: Reason(s) have not attended any city centre event



5.15. City Centre Summer Events and Coventry VIP Scheme

The Oktoberfest event in Broadgate was the most popular summer event, with 15% of respondents having attended. A third of respondents had attended at least one of the events on the summer program.

Figure 15.1 : City centre summer event attendance

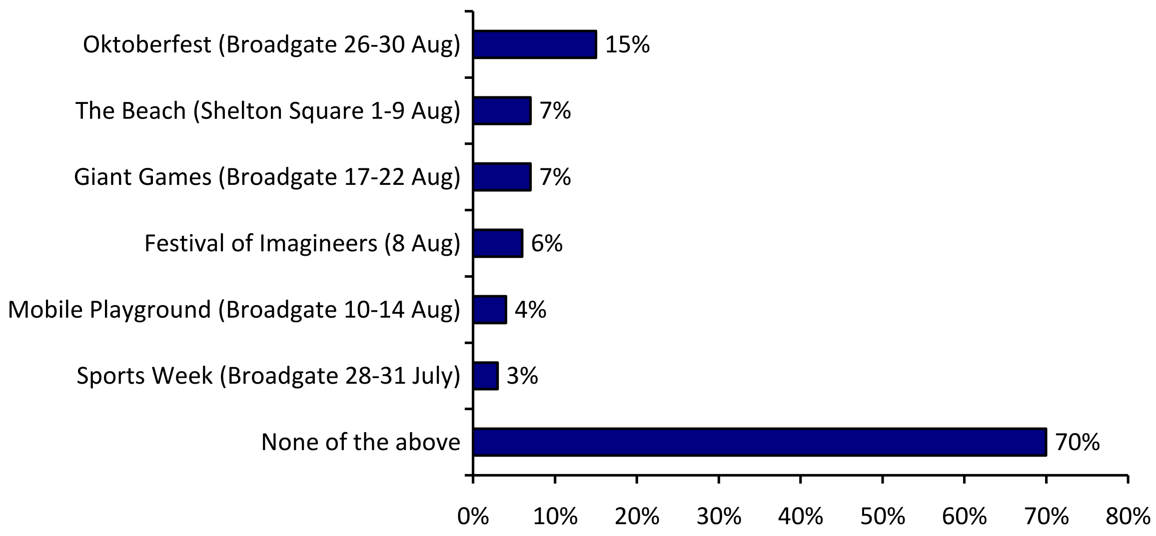
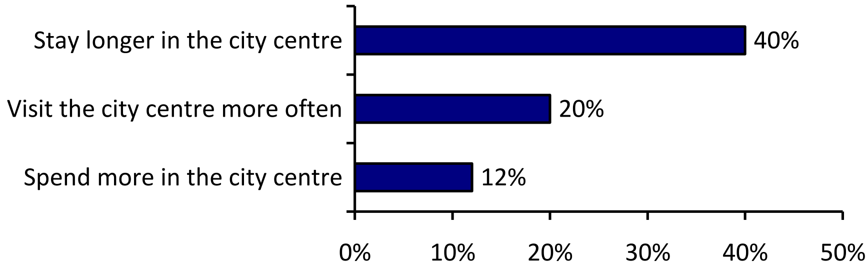


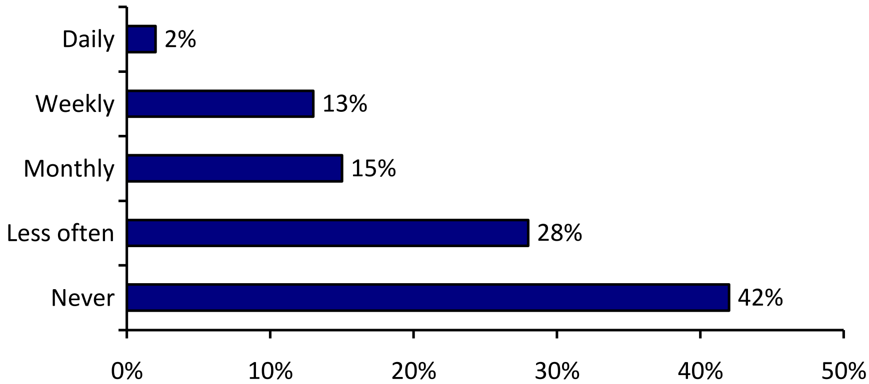
Figure 15.2 : Did these events encourage you to



The impact of those attending events over the summer period was seen to stimulate dwell time, visits and spend, with 40% of attendees saying they stayed longer, 20% saying they would visit more often and 12% saying they would spend more in the city centre.

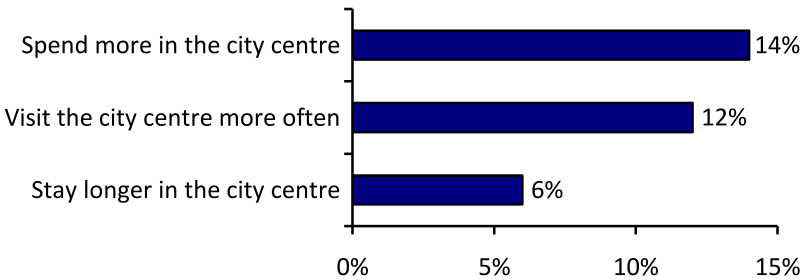
A third of respondents had heard of the Coventry VIP scheme. Of those who had heard of the scheme, three-quarters had seen Coventry VIP advertising. Half of those aware of the scheme were a member of the scheme.

Figure 15.3 : How often do you use it



58% of VIP members said they used the scheme, with 14% saying they used the scheme at least weekly. The VIP scheme was also seen to stimulate spend, visits and dwell time in the city centre (with 14%, 12% and 6 % respectively)

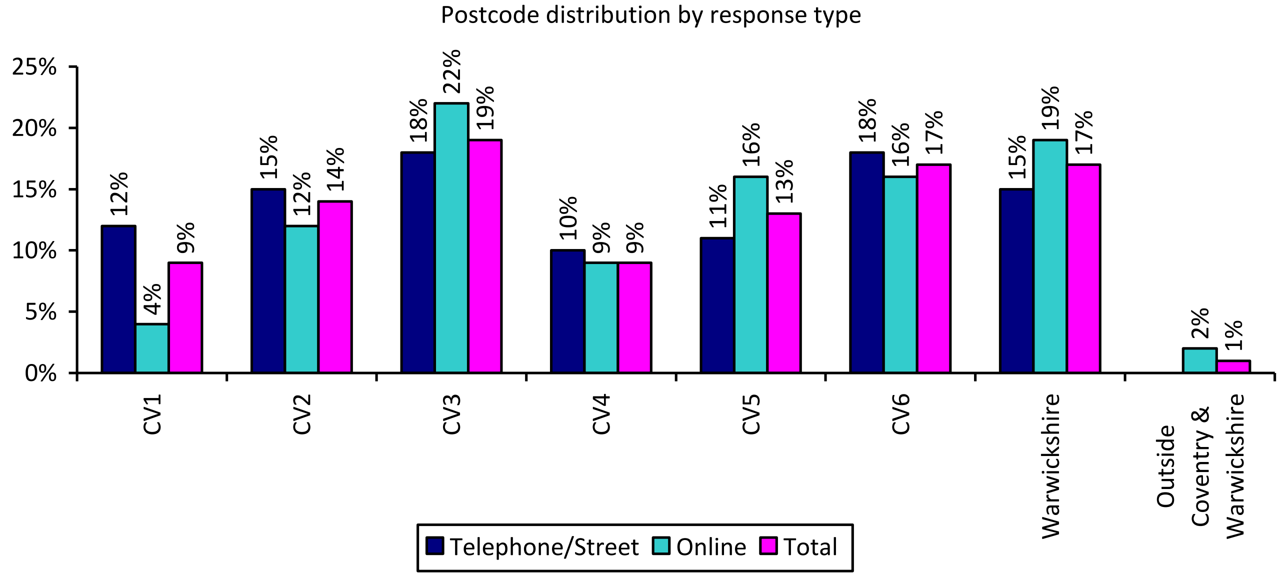
Figure 15.4 : Does the VIP scheme encourage you to



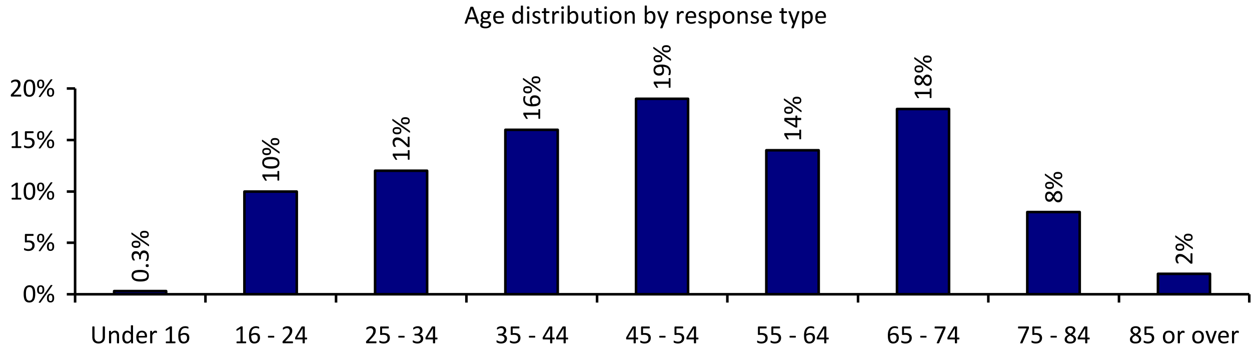
Appendix 1. Demographic Profile

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 9% and 19% of respondents.



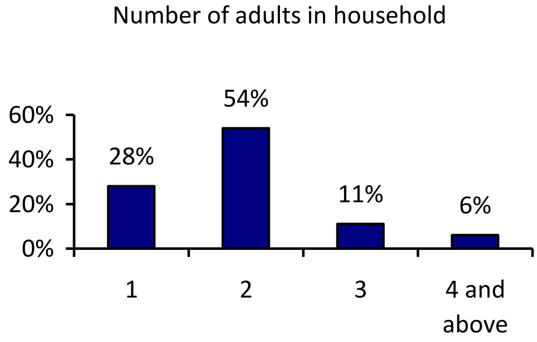
Overall, response by age was fairly evenly spread for all age groups.

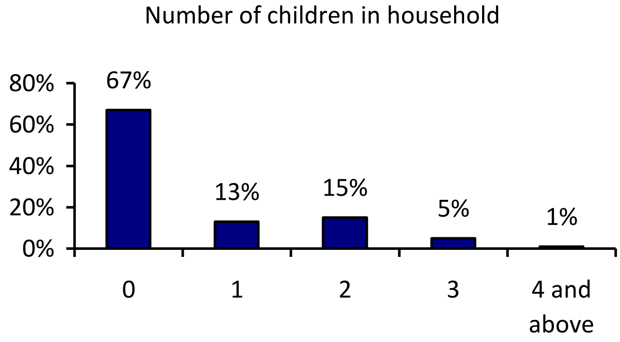


Profile of gender revealed 66% of respondents were female, 34% male.

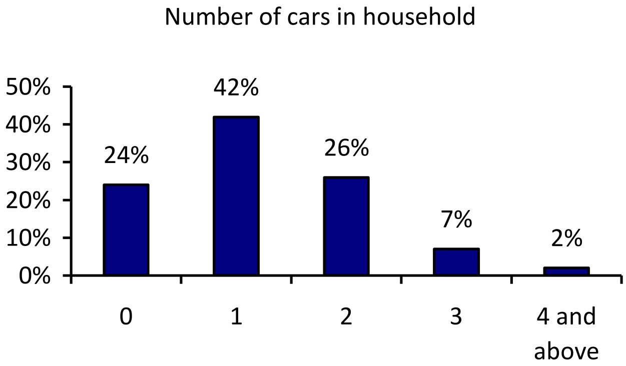
Just over half of the sample reported that they lived in a two adult household (54%). 28% were the sole adult at home while 18% were part of households comprising of three or more adults.

The majority of respondents were from a household with no children (67%) while 33% had one or more children living with them.

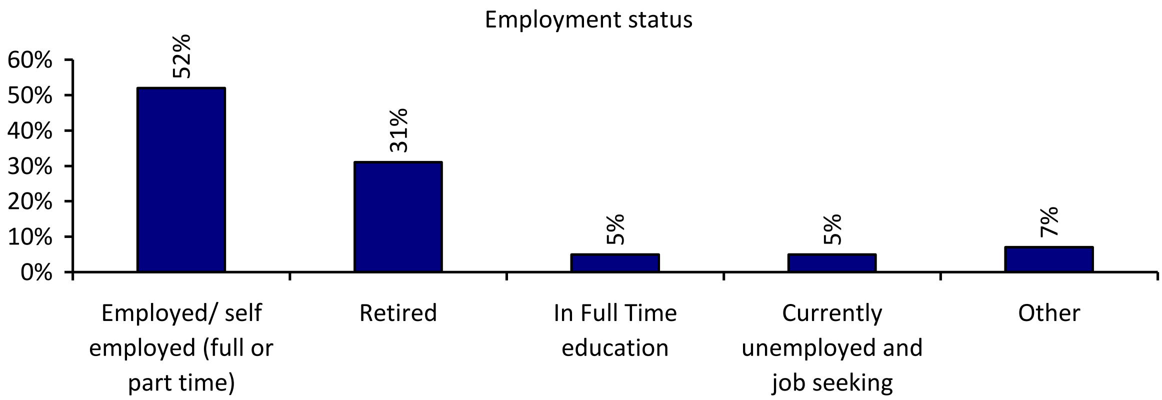




Most people surveyed had access to at least one vehicle but 24% of the sample came from a household without a car.



Breakdown of the sample by occupation revealed that, overall, 52% of respondents were currently in paid employment, 31% were retired, 5% were full-time students and 5% were unemployed job seekers.



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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