Canterbury Destination Management Plan

Research Report

November 2013

in partnership with

Contents Page

7.3 Service use and satisfaction within Canterbury

8. Appendix

Appendix 1 - Mosaic Public Sector Type
Appendix 2 – K&M Group
Appendix 3 – Mosaic Mapping
Appendix 4 – Perception of Kent destinations
Appendix 5 - How satisfied are you with each of the following services?
Appendix 6 - How often do you use the following services?
Appendix 7 - If you have never used (or experienced) any of the following services please tell us why

1. Objectives of Research

This research is part of the evidence gathering process for the Canterbury Destination Management Plan (DMP) for this area. The DMP will be a clear, straightforward and practical plan that sets out the opportunities to grow tourism, and what is needed to make sure we have a really strong and successful tourism sector.

2. Methodology

As a mature destination, Canterbury has a lot of primary research. This report has gathered this existing research and brought it together to develop a clear and holistic understanding of Canterbury as a destination. This will be used to help formulate and direct a coherent Destination Management Plan for the area.

The following research has been consulted:

- Canterbury Visitor Survey 2012
- Canterbury Cathedral Visitor Satisfaction Survey
- Canterbury Cathedral Visitor Origin Data
- The Canterbury Tales Nationality Analysis
- The Canterbury Tales Visitor Survey
- The Canterbury Tales Visitor Breakdown
- aBode Hotel Visitor Statistics
- Canterbury 'Be Honest' Feedback Forms
- The Canterbury Anifest Survey
- The Canterbury Festival Survey
- The Canterbury Food & Drink Survey
- The Marlowe Theatre Survey
- Whitefriars KPI Summaries
- Canterbury Christ Church University – 'Canterbury as a Place' Survey
- Canterbury City Council 2012 Residents Survey
- Visit Kent Cambridge Model 2011
- Kent 2010 Visitor Survey
- Visit Kent Perception Research 2012
- Visit Kent Beyond 2012 Visitor Survey
- International Passenger Survey, Office for National Statistics
- VisitEngland 'Great Britain Tourism Survey' 2012
- Canterbury Hotel Market Fact File 2011
- TRI Hotstats UK Hotel Market Review
- Visit Kent Product Audits

3. Volume and Value of Visits

3.1 Headline figures

Identified through Visit Kent's Cambridge Model report, Canterbury's headline tourism figures for 2011 were:

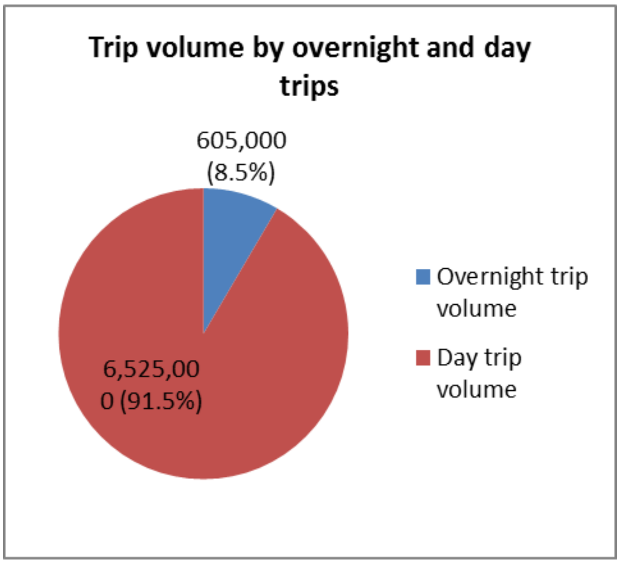
- Total Visitors: 7,130,000
- Total Economic Impact: £428,537,000 (including retail and induced and indirect effects)
- Total Employment: 8,359 jobs in the tourism sector

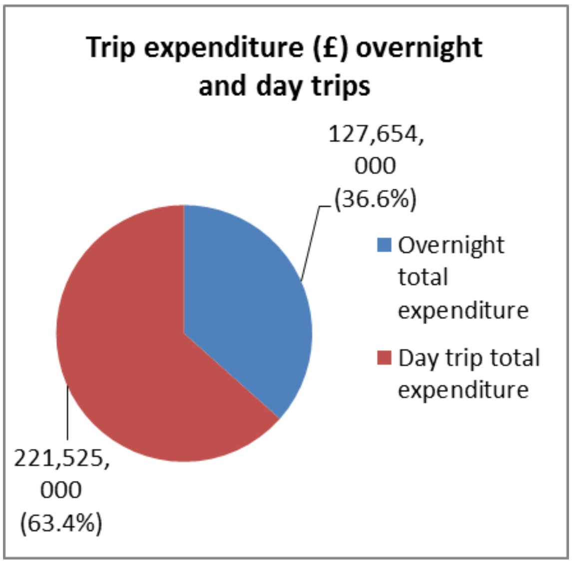
Note: visitors here includes both overnight visitors (those on a trip that consists of at least one night spent away from home, has no upper limit, and has its end marked by the respondent's return to home) and those on tourism day trips (defined as 3 hour + visits away from their normal place of residence and which involved 1 or more particular activity).

3.2 Volume and value of day and overnight trips

In 2011, 6,525,000 tourism day trips were made to Canterbury, compared to just 605,000 overnight trips. Overnight trips contribute just 8.5% to the total volume of trips made to Canterbury in 2011.

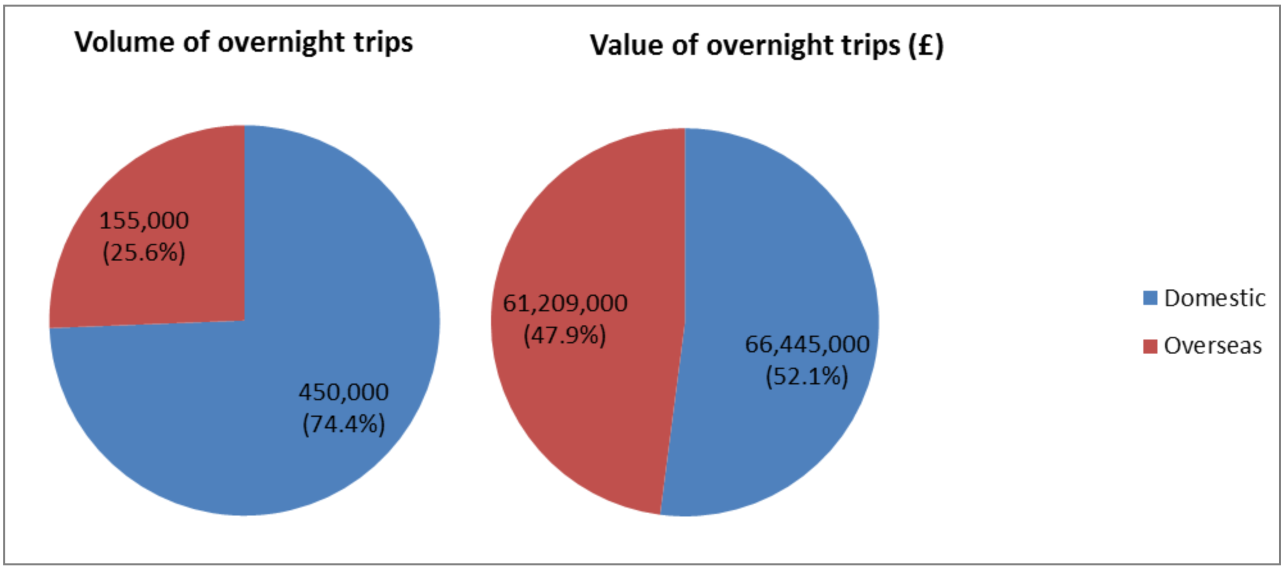
£221,525,000 in expenditure was seen through day trips to Canterbury, compared to £127,654,000 in total expenditure for overnight visits. Here overnight trips make up a larger percentage of the total expenditure (£349,179,000) than they did to volume at 36.6% of the total expenditure.





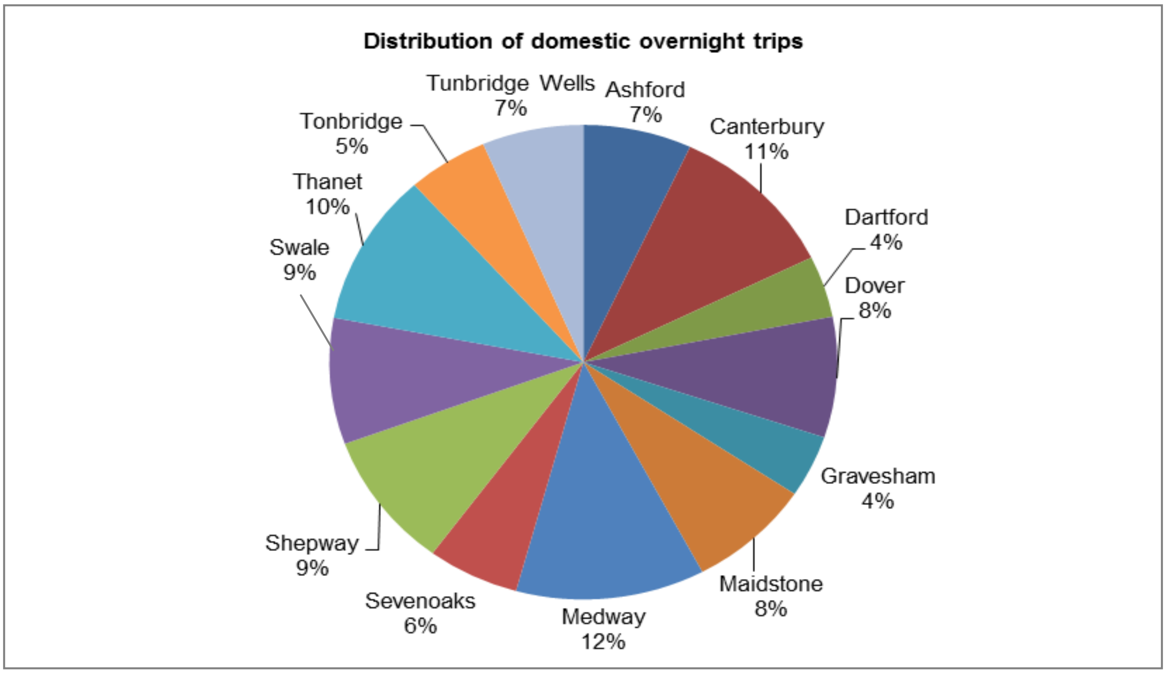
Source: *Cambridge Model 2011*

The breakdown of overnight trips by domestic and overseas visitors can be seen below. Although, overseas visitors only contribute 26% to the volume of overnight trips, they account for nearly half of the total value at 47.9%.

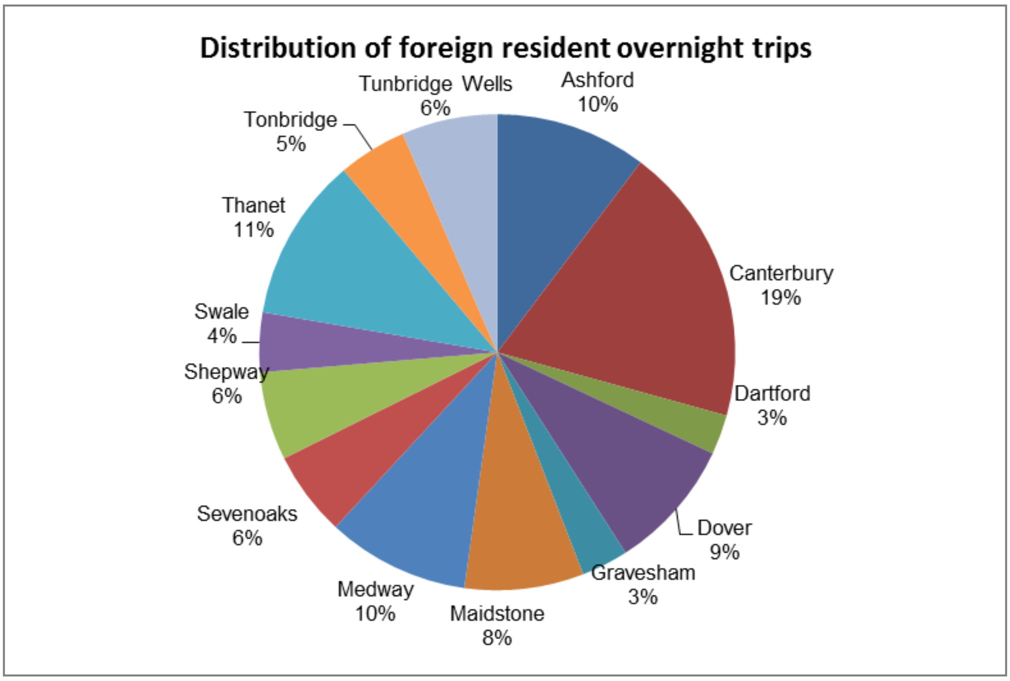


Source: *Cambridge Model 2011*

The graphs below show how the volume of domestic and overseas overnight trips fit in with in the broader Kent picture.



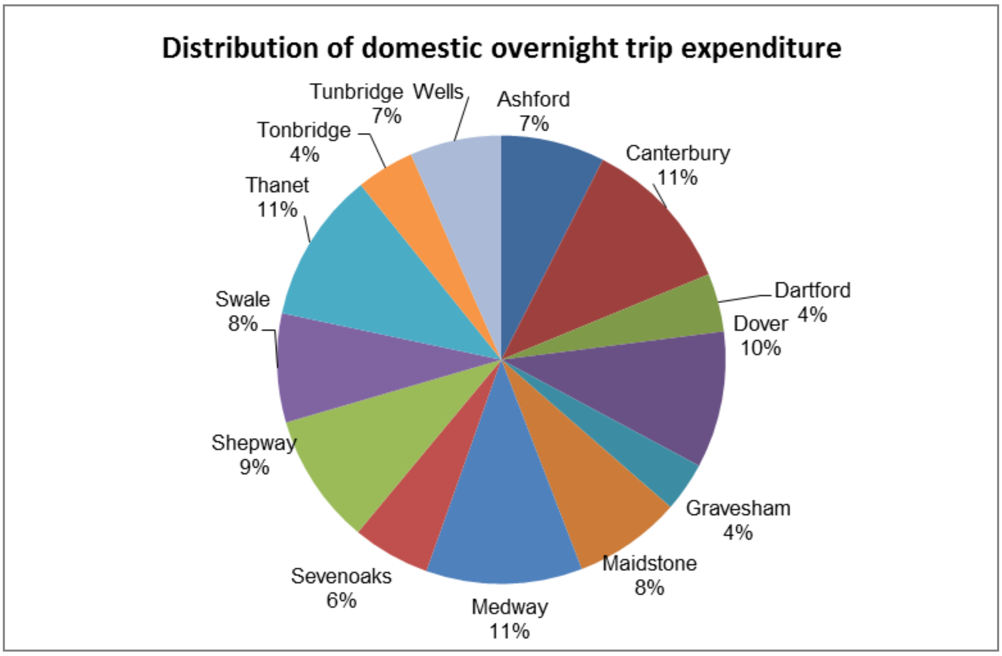
Source: *Cambridge Model 2011*



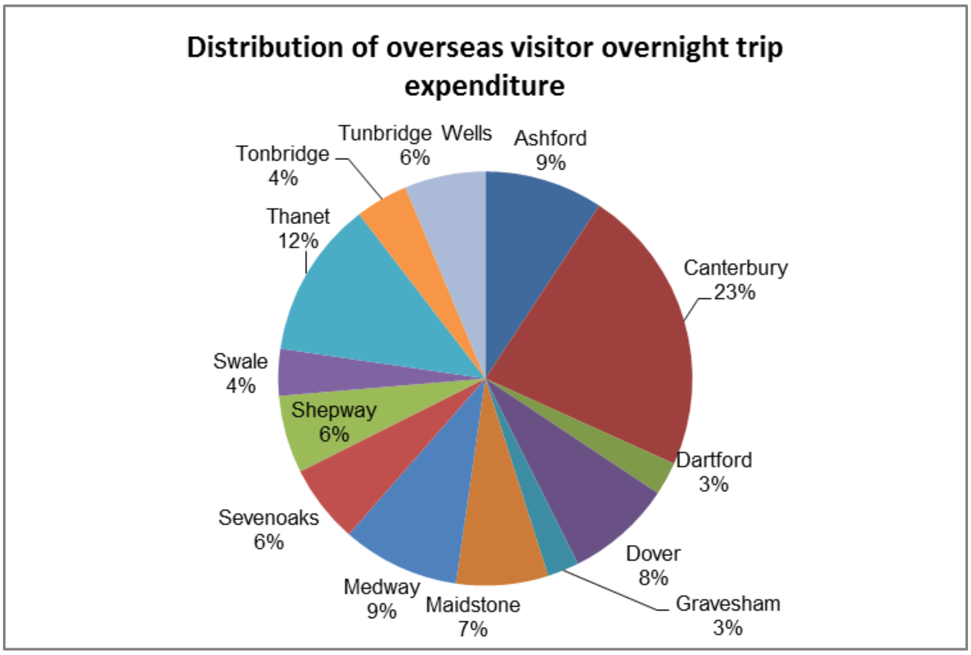
Source: *Cambridge Model 2011*

Positively, it can be seen that with around 450,000 domestic overnight trips, Canterbury enjoys approximately 11% of all domestic overnight trips to the county, second only to Medway at 12%. However, for foreign resident overnight trips, Canterbury ranks first within Kent, with the 155,000 trips enjoyed accounting for approximately 19% of the Kent total, followed by Thanet at 11%.

The distribution of overnight trip expenditure (for domestic and overseas visitors) can, again, be seen within the context of Kent as a whole in the below graphs.



Source: *Cambridge Model 2011*

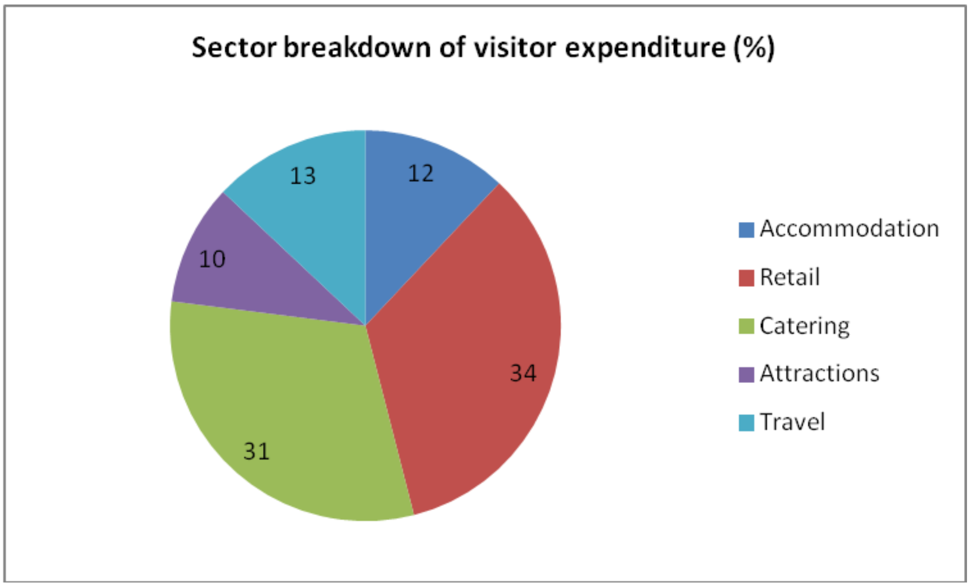


Source: *Cambridge Model 2011*

Here it can be seen that Canterbury ranks first for both domestic and overseas visitor expenditure. For domestic overnight trips, expenditure in Canterbury accounts for 11% of the Kent total, and for overseas overnight trips, nearly a quarter (23%) - the latter much higher than the next placed destination Thanet at 12%.

3.3 Expenditure by sector

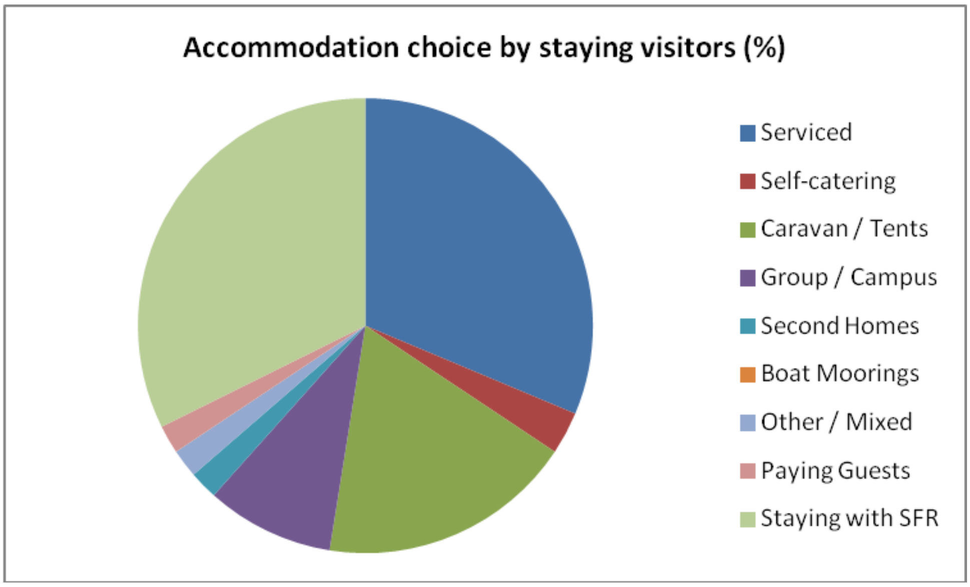
Looking at Canterbury's visitor expenditure as a whole, we can see that the majority of spending takes place across the retail sector (34%), followed by catering (31%), travel (13%), accommodation (12%) and finally attractions (10%).



Source: *Cambridge Model 2011*

Adjusting for factors such as spend taking place outside the destination, the total value of tourism activity in Canterbury for 2011 is estimated to be around **£428,537,000 – up 5% on 2009.**

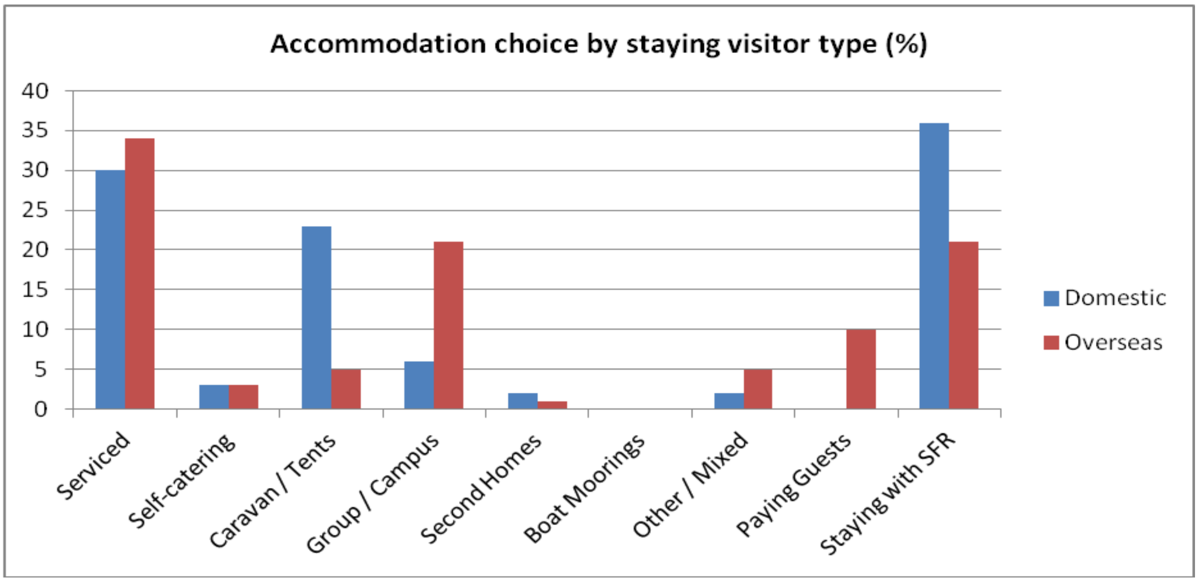
3.4 Accommodation



Source: *Cambridge Model 2011*

The above graph shows the most popular choice of accommodation amongst Canterbury's staying visitors to be with friends or relatives (32%). 31% of visitors also stayed at serviced accommodation, with a further 18% staying at camping or caravanning sites.

Breaking accommodation choice down by domestic and overseas visitors can also reveal some interesting insights. Whilst staying with friends and relatives is shown to be the most popular choice for domestic visitors (36%), serviced accommodation remains the most poplar for overseas visitors at 34%. This is followed by group / campus accommodation and friends / relatives, both at 21%.



Source: *Cambridge Model 2011*

With Canterbury’s serviced accommodation ranking highly amongst accommodation choice for visitors, data from ‘TRI Hotstats UK Chain Hotels Market Review’ (presented in Canterbury’s Hotel Market Fact File) show that for Canterbury’s hotels specifically, occupancy is broadly in line with national averages for 2009 and 2010 (although varying considerably between hotels). However, the fact file also shows the average annual achieved room rates in the area to fall below the UK average and again vary significantly amongst hotels. Weekend occupancy for Canterbury’s hotels (when leisure breaks to the area are high) is shown to be very strong (often having to deny business in the key months), but mid week demand largely seasonal, peaking in the summer season.

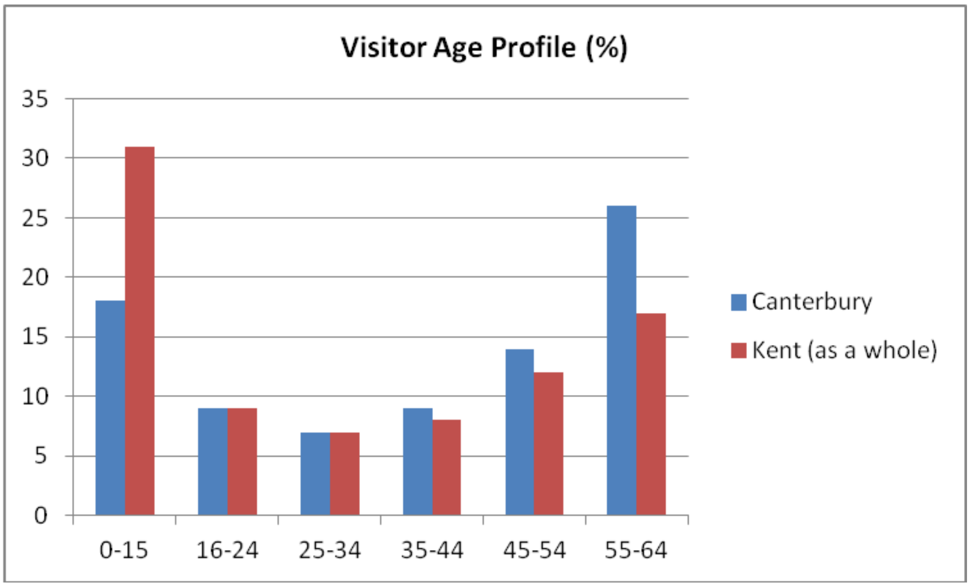
3.5 Canterbury’s products

As of March 2012, Visit Kent’s product audit revealed there to be over 100 attractions in Canterbury, far greater than any other district within the county. Furthermore, with over 130 serviced accommodation businesses, around 300 self-catering properties, and approximately 50 camping and caravanning sites, Canterbury and the surrounding area again also holds more accommodation than any other Kent district. However, these figures relate to the whole district (which includes Herne Bay and Whitstable), rather than the city alone. There is a recognised shortage of quality serviced accommodation within the city.

4. Who are the visitors to Canterbury?

Through the collation of feedback from a range of different surveys, an insight into the type of visitor to Canterbury can be generated and through this, current and potential markets can be located and targeted marketing strategies formulated. Although these face to face / online surveys represent only a small sample of the total volume of tourism, they do offer an indication of Canterbury's visitor profile and other tourism characteristics of the area.

4.1 Age profile



Source: *Kent 2010 Visitor Survey report*

Although spread across the age ranges, the Kent 2010 Visitor Survey report (based on 2800 face-to-face visitor surveys across Kent's districts) shows Canterbury's visitors to be skewed towards the older age groups, with just 27% of visitors aged 24 and under, and 40% aged 45 and over. In comparison, Kent as a whole receives 40% of visitors under 24 years of age, and just 29% over 45. These results are supported by the Canterbury 2012 Visitor Survey which showed 53% of visitors to the area to be aged over 45 years. This survey involved 400 face-to-face interviews with adults visiting Canterbury. The majority of the surveys were conducted outside the Cathedral Gate and within The Buttermarket between July and August 2012.

Further support comes from the databases of visitors held by Canterbury Cathedral, the Canterbury Festival and the Marlowe Theatre. For the Canterbury Festival, 67% of visitors are aged 55 and over, 56% at the Marlowe, and 45% at Canterbury Cathedral. With 4.3% of visitors to the Canterbury Festival aged under 25, 6% at Canterbury Cathedral and just 2.5% at the Marlowe, it would certainly seem that Canterbury is a draw for older visitors.

Using Visit Kent's 2012 Perception Research, we can break the age groups of Canterbury's visitors down according to those who have visited the destination, those who are just aware of the destination and those who have never heard of the area:

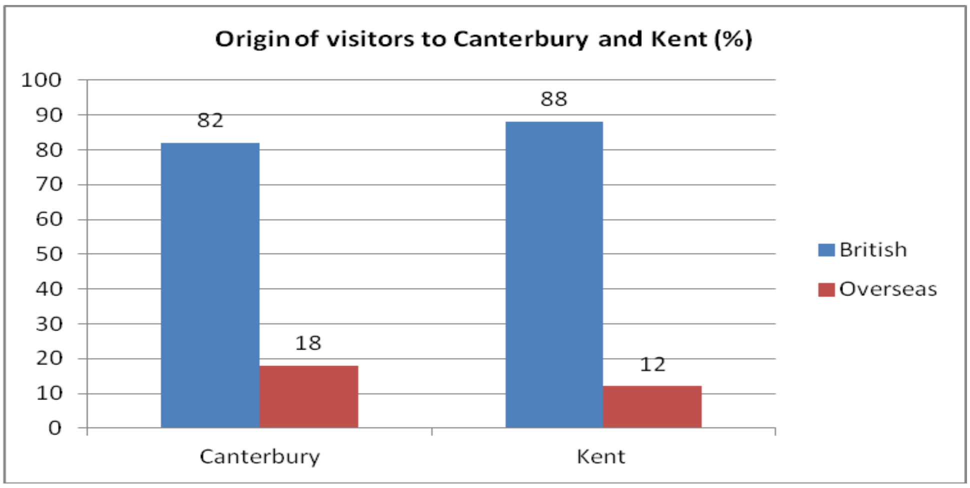
	Aware of and have visited Canterbury (%)	Aware of but not visited (%)	Not heard of (%)
Under 15	-	-	-
15-24	2	7	14
25-34	8	16	31
35-44	16	20	22
45-54	25	22	16
55-64	29	22	11
65 and over	19	11	5
Prefer not to say	1	0	0

Source: *Visit Kent Perception Research 2012*

Here we see a high proportion of visitors in the younger age ranges who have never heard of Canterbury, and a higher proportion of visitors in the older age groups who are aware of Canterbury and have visited the area – supporting further our conclusion that Canterbury is more popular with older visitors. Increasing awareness of the destination amongst younger audiences may be key to attracting this market, if desired.

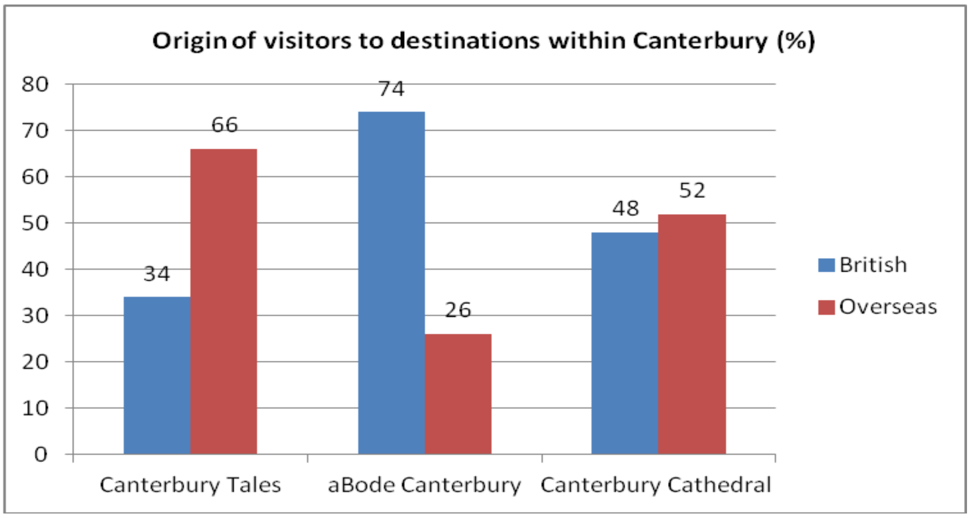
4.2 Visitor origin

Looking at the results of the Kent 2010 Visitor Survey, we can see that Canterbury attracts a larger proportion of overseas visitors than Kent as a whole (18% compared to 12%), confirming the Economic Impact Studies for the area. However, it should be noted that, in the Kent 2010 Visitor Survey, Canterbury includes the areas of Herne Bay and Whitstable too. Nonetheless, 33% of visitors are also shown to have come from overseas in the Canterbury 2012 Visitor Survey too, again showing the higher proportion of overseas visitors enjoyed by Canterbury compared to Kent.



Source: *Kent 2010 Visitor Survey report*

When we turn to look at the origin of visitors at specific destinations within Canterbury, this difference becomes even more apparent. The Canterbury Tales, for example, saw 66% of its visitors in 2012 coming from overseas, and Canterbury Cathedral 52%. Canterbury, and in particular certain destinations within the city, seem therefore to enjoy a significant overseas market within the context of Kent as a whole.



Source: *Individual destination surveys*

However, as the above graph shows, with just 26% of aBode's visitors coming from overseas, it may seem that many international visitors to Canterbury are on day rather than overnight trips to the city. This conclusion, however, cannot be confirmed from this data alone.

From the Visit Kent 2012 Perception Research (which saw 2802 UK respondents and 1970 overseas respondents) visitor origin data can be broken down:

	Aware of and have visited Canterbury		Aware of but not visited		Not heard of	
	%	Counts	%	Counts	%	Counts
Inside UK	58%	1311	65%	1219	42%	272
Outside UK	42%	931	35%	657	58%	382

Source: *Visit Kent Perception Research 2012*

Here we can see that a higher percentage of UK respondents are both aware of and have visited Canterbury, or aware of but haven't visited the area, than overseas respondents. For those respondents who have not heard of the area at all, we see overseas residents outrank domestic visitors.

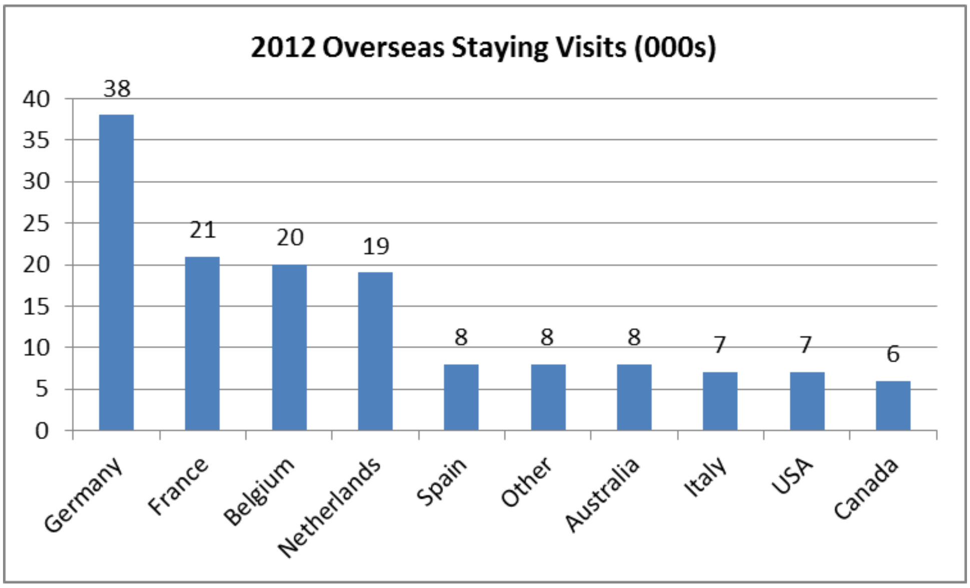
Looking first at where Canterbury's domestic visitors come from, the Visit Kent Perception Research 2012 can help us identify levels of awareness and visits according to place of origin.

	Aware of and have visited Canterbury (%)		Aware of but not visited (%)		Not heard of (%)	
	%	Counts	%	Counts	%	Counts
Bedfordshire	1	19	2	19	1	4
Berkshire	2	22	1	15	0	1
Buckinghamshire	3	33	1	11	2	6
Cambridgeshire	2	32	3	36	1	4
Essex	8	107	3	36	4	10
Hampshire	5	67	4	50	8	21
Hertfordshire	5	65	3	31	1	4
Kent	-	-	-	-	-	-
Leicestershire	2	28	2	30	3	7
London	23	305	9	115	25	67
Northamptonshire	1	14	2	21	2	6
Oxfordshire	2	20	1	12	1	4
Surrey	5	70	2	30	6	16
East Sussex	3	42	1	12	1	4
West Sussex	3	33	1	8	1	4
Elsewhere in UK	35	454	65	793	42	114

Source: *Visit Kent Perception Research 2012*

Turning our attention now to where Canterbury's overseas visitors come from.

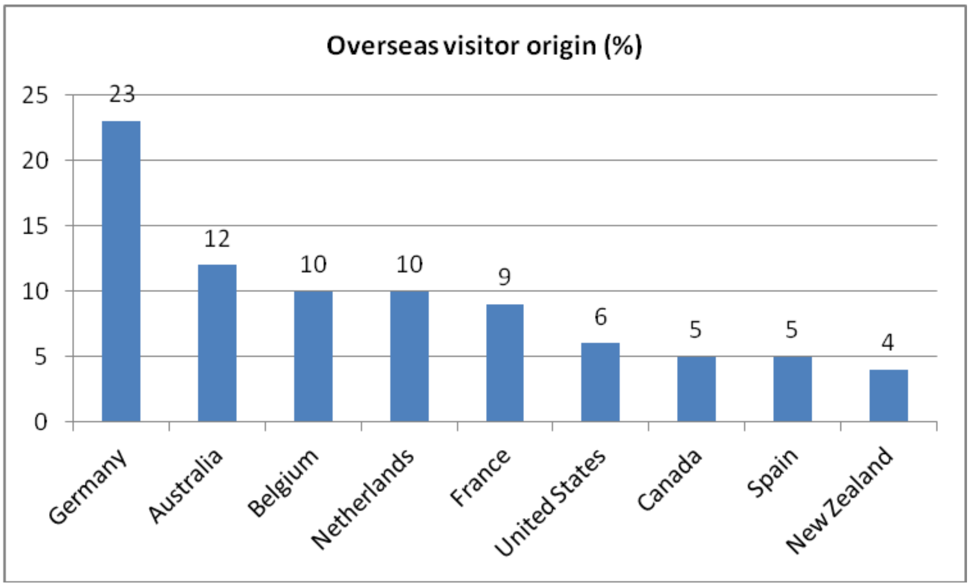
Using the 2012 International Passenger Survey, and looking at just staying visits in 2012, below we can see the top 10 overseas countries of origin for Canterbury:



Source: *Office for National Statistics, International Passenger Survey*

For overseas staying visits, it would seem that German visitors are by far the biggest market, making 38,000 staying visits in 2012. This is followed by the French (21,000), Belgian (20,000) and Dutch markets (19,000). Visitors from Spain, Australia, Italy, USA and Canada also feature in the top markets here, suggesting Canterbury to be a draw for visitors from right across the world, not just the neighbouring short-haul European markets (although these do rank the highest).

Although coming from a less robust sample, data from the Canterbury 2012 Visitor Survey also shows us the top origin countries for Canterbury's overseas visitors (beyond just staying visitors). *It is important to note that just 132 respondents were from overseas destinations, and so the results here reflect differences from within a small sample size.*



Source: *Canterbury Visitor Survey 2012*

As can be seen, the above are closely in line with the staying markets identified on the previous page, reinforcing Canterbury's top overseas markets. Here Germany again ranks highest at 23%, however here we are followed next by Australia (at 12%), Belgium (10%), Netherlands (10%) and France (9%). United States, Canada, Spain and New Zealand all feature next.

Data from Canterbury Cathedral specifically also reveals their top three origin destinations to be USA, Germany and France and for 2012, The Canterbury Tales also saw visitors from France, Germany and Holland top their foreign visitor list – reinforcing further the wide spread of visitor countries enjoyed by Canterbury.

The above findings are also generally in line with the top markets seen across Britain as whole. According to the International Passenger Survey, the top 5 markets for Britain as whole are France, Germany, USA, the Irish Republic and the Netherlands.

Using Visit Kent's Perception Research again, we can break the overseas respondents down:

	Aware of and have visited Canterbury		Aware of but not visited		Not heard of	
	%	Counts	%	Counts	%	Counts
Germany	16%	153	26%	173	25%	96
France	23%	218	21%	137	19%	71
Belgium	25%	234	19%	125	16%	63
Netherlands	19%	181	18%	116	32%	124
Other	16%	145	16%	106	7%	28

Source: *Visit Kent Perception Research 2012*

Here, Belgium and France receive the highest proportion of respondents who are both aware of and have visited Canterbury, followed by Netherlands, Germany and other. Germany and France then top the list for respondents who are aware of the area but haven't visited. For those who have not heard of Canterbury, Netherlands ranks first at 32%, followed by Germany at 25%. Clearly then, even amongst significant markets for Canterbury, levels of awareness and non-visitors are still quite high – highlighting clear opportunities for the area.

4.3 Visitor type

For this study, we conducted a mosaic segmentation analysis on a database of 11,573 UK postcodes from Canterbury Council and Canterbury Cathedral's records of people who had either requested tourist information on the city or had visited and gift-aided the Cathedral. By removing Kent postcodes from the database, we can identify the types of people most drawn to the city, and those who are underrepresented.

From the mosaic analysis, those (potential) UK visitor types that are drawn to Canterbury in numbers 1.5 times above their national representation can be identified (**appendix 1**). Results have been presented from the highest over-indexing type down. *It must be noted that all Kent and Medway postcodes have been removed from both the Canterbury visitor database as well as the national level database to enable comparison between the two.*

Type	Description	Canterbury %	National %	Index
G27	City dwellers owning houses in older neighbourhoods	1.68	0.65	258
C09	Successful older business leaders living in sought after suburbs	3.58	1.57	228

C11	Creative professionals seeking involvement in local communities	2.62	1.17	223
G28	Singles and sharers occupying converted Victorian houses	1.28	0.58	221
G26	Well educated singles living in purpose built flats	2.66	1.24	215
I39	Young owners and private renters in inner city terraces	0.99	0.48	206
D15	Well off commuters living in spacious houses in semi rural settings	4.25	2.10	202
G29	Young professional families settling in better quality older terraces	3.50	1.77	198
D14	Older people living in large houses in mature suburbs	3.77	2.05	184
E17	Comfortably off suburban families weakly tied to their local community	5.07	2.82	180
G31	Owners in smart purpose built flats in prestige locations, many newly built	2.11	1.18	179
F22	Busy executives in town houses in dormitory settlements	2.58	1.49	173
D13	Higher income older champions of village communities	3.57	2.06	173
D16	Higher income families concerned with education and careers	4.17	2.43	172
G30	Diverse communities of well-educated singles living in smart, small flats	0.70	0.41	169
A01	Rural families with high incomes from city jobs	1.50	0.90	168
C12	Residents in smart city centre flats who make little use of public services	0.39	0.25	155

Aggregating the mosaic type profiles into their corresponding K&M groups, we can also identify those groups which over index in Canterbury (**appendix 2**). The Kent and Medway groups represent broader group definitions into which the more specific mosaic type profiles can be aggregated. The K&M groups have been created specifically for use by Kent Local Authority partners and provide a more accurate understanding of the demographics and lifestyle characteristics of the Kent and Medway population.

K&M Group	Description	Canterbury %	National %	Index
A	Extremely affluent, well educated owner-occupiers	16.23	8.35	194

B	Well off families with older children, working in managerial and professional careers	11.97	7.77	154
C	Retired people living comfortably in large bungalows and houses, often close to the sea	11.21	7.90	142
G	Younger professionals with children, some living in ethnically diverse neighbourhoods	25.57	18.73	137
F	Singles and divorcees approaching retirement, mostly living in privately rented flats and bungalows	4.77	4.21	113

Interestingly, from the above we can see that Canterbury draws in interest from visitors across the age groups, with families, young professionals and older people all over-indexing more than 1.5 times above the national average. The above findings therefore seem to support the wide spread of age ranges (with a slight skewing towards the older age groups) also identified in the Canterbury and Kent Visitor Surveys.

Furthermore, although the above findings suggest a broad reach of visitor in terms of their economic profile, it is the more affluent visitor which features more prominently in the above, with high-income, successful and well off visitors all featuring. Results from the Canterbury Visitor Survey also support this, showing the majority of visitors to come from ABC1 households, with 40% of visitors falling in the C1 economic profile, and a further 30% in AB. However, if we disaggregate the Canterbury Cathedral postcodes from those held by Canterbury City Council, and run separate analyses on these, we see that, although many of the over-indexing groups feature in both databases, the more affluent groups are even more likely to over-index in the Canterbury Cathedral database *(however it is worth remembering that Canterbury Cathedral's database represents visitors to the Cathedral who opted in to gift-aid donations).*

Therefore, although reaching a broad socio-economic profile, Canterbury, and the Cathedral in particular, certainly seem to be a draw for the more affluent and older households.

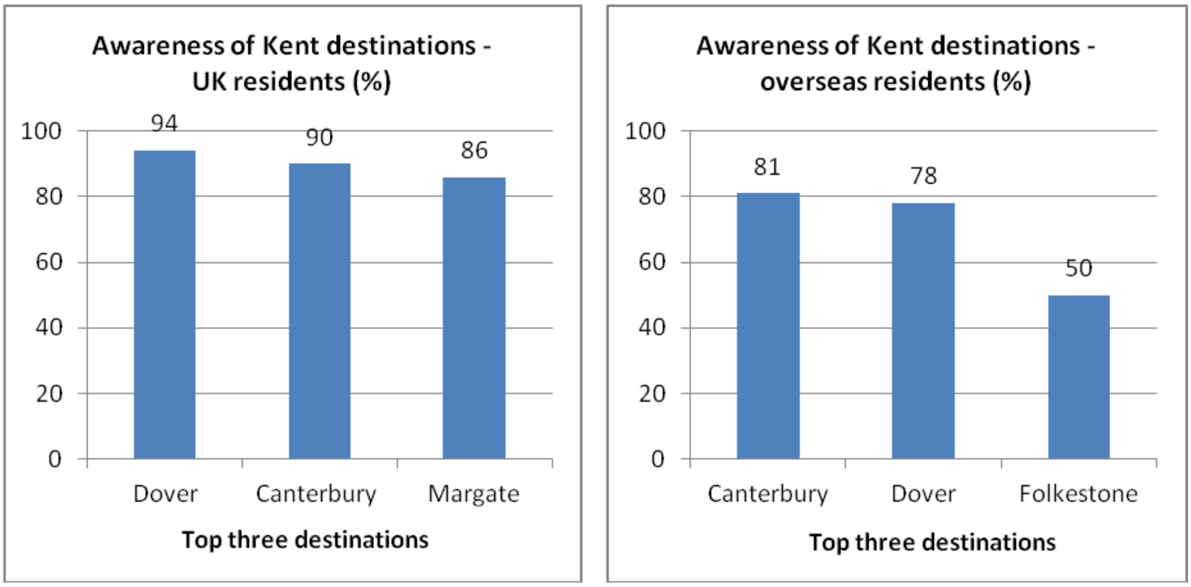
Looking now at the geographical spread of these potential visitors (as shown in **appendix 3**), ignoring visitors from within Kent, we can see the largest concentration coming from in and around London and the neighbouring counties. In fact beyond this, strong interest is also shown to be spread right across the country, with concentrations clearly evident in the larger cities including Birmingham, Manchester and Liverpool. Therefore Canterbury's appeal, although strongest in and around London and the closer markets, can be seen to stretch far beyond just the immediate surrounding areas.

5. Visitor behaviour

5.1 Awareness

The Visit Kent 2012 Perception Research indicates levels of awareness and perceptions of Canterbury amongst respondents, but note that it includes the responses of both visitors and non-visitors to the area.

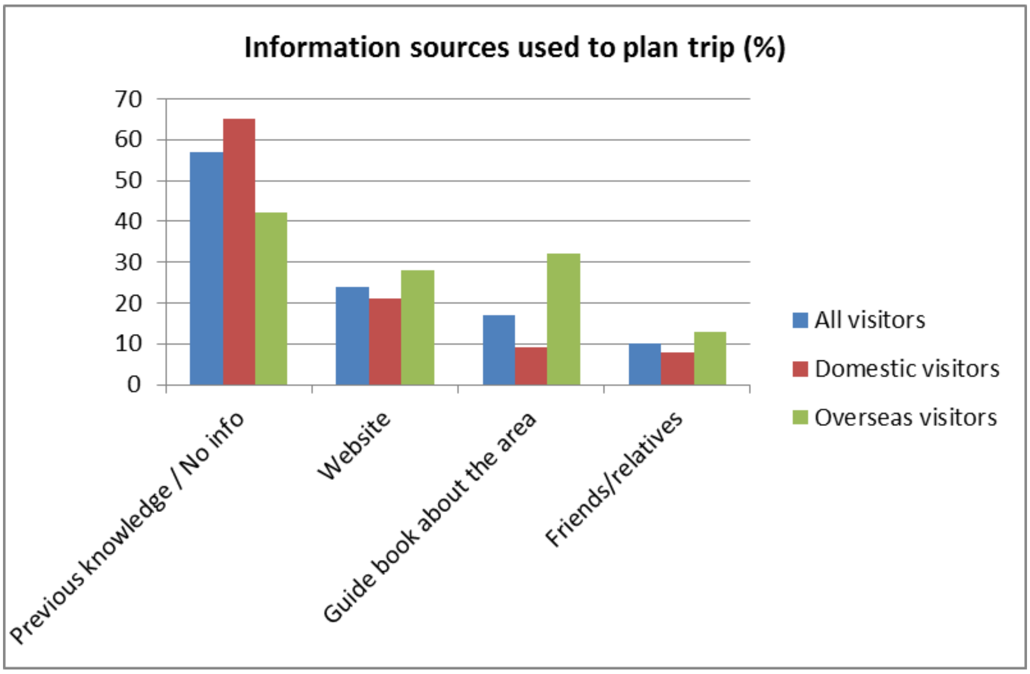
From this research it can be seen that 90% of UK respondents were aware of Canterbury as a destination (up 15% from 2007), second only to Dover at 94%. For non-UK residents though, Canterbury is the destination most are aware of; it comes top of Kent's destinations at 81%. Here, Dover ranked second at 78%, followed by Folkestone at 50%, suggesting a much higher profile for Canterbury for overseas residents than all other Kent destinations.



Source: *Visit Kent Perception Research 2012*

5.2 Information sources used

The Canterbury Visitor Survey (which involved face-to-face visitor surveys within the city itself) helps us identify the information sources used by visitors to help plan their trip. The below graphs show the top 4 information sources used, and here it can be seen that previous knowledge or no information was most popular for both domestic and overseas visitors. Whilst websites were the next most popular choice for domestic visitors, guide books ranked second for overseas visitors. Friends and relatives ranked fourth for both visitor types. The more formal sources of information, it would therefore seem, tend to be used more by overseas visitors than domestic.



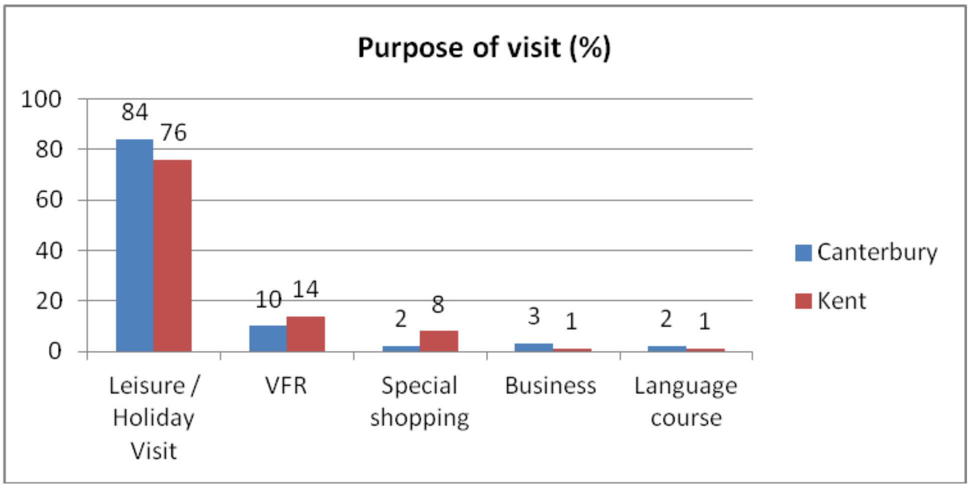
Source: *Canterbury Visitor Survey*

For the Canterbury Tales specifically (who receive a high proportion of overseas visitors), leaflets, recommendations / word of mouth and websites were the most popular information sources prompting a visit to the attraction.

5.3 Purpose of visit

Looking at both the Kent and Canterbury Visitor Surveys, leisure and holiday purposes are by far the main motivation for visiting Canterbury (84% and 91% respectively), higher than the overall Kent average at 76%. For both surveys, visiting friends and relatives ranks second. Beyond this, the ranking of business, language courses and special shopping vary between both surveys, but here percentages are much smaller.

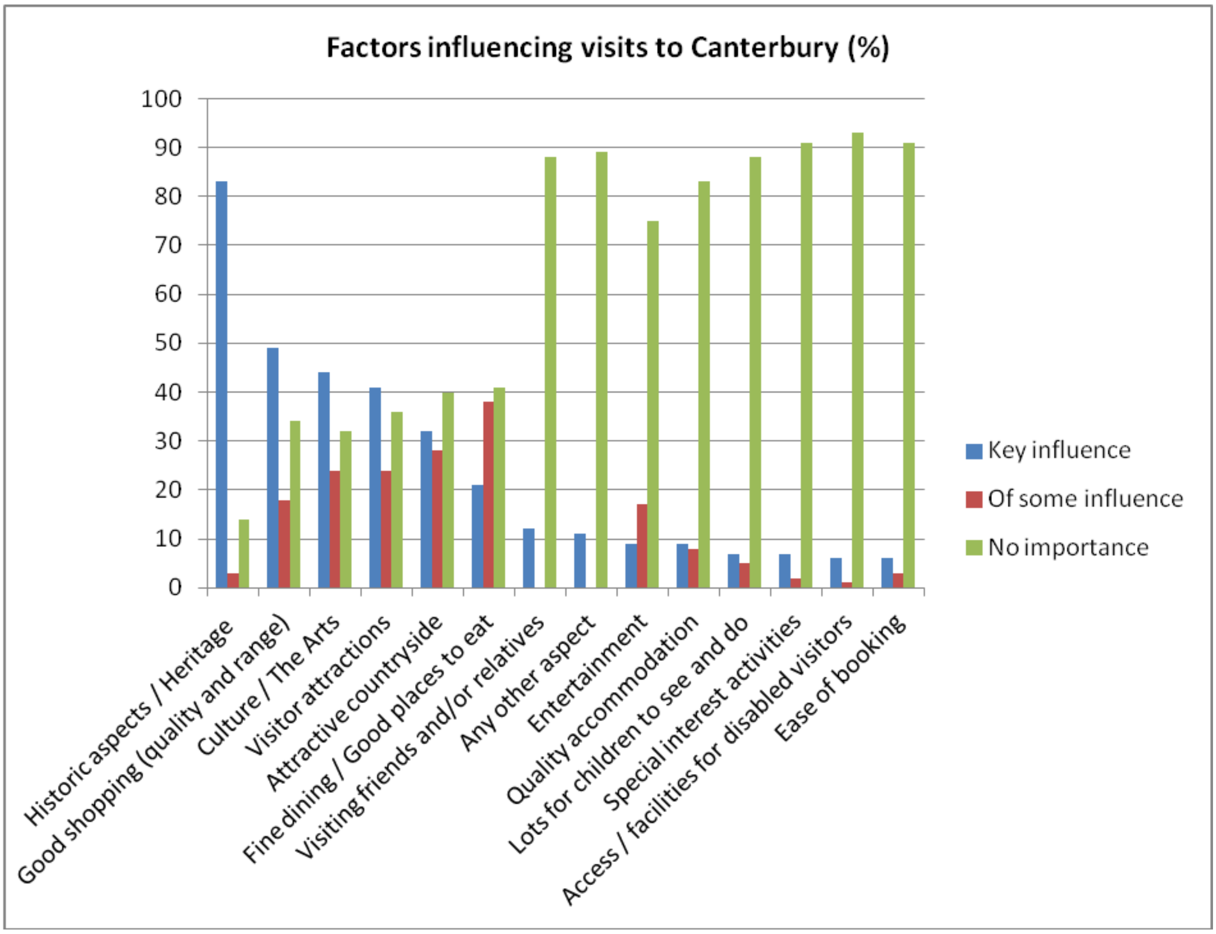
Interestingly though, at 3% and 2% in the Kent 2010 and Canterbury Visitor Surveys respectively, special shopping falls below the Kent average at 8%.



Source: *Kent 2010 Visitor Survey report*

Below we can see the relative importance of key influencing factors for visits to Canterbury, as identified in the Canterbury Visitor Survey Report. Here we can see that historic aspects / heritage was by far the key influencing factor for visits to Canterbury for 83% of respondents (also coming out top in the Kent 2010 Survey). This was followed by good shopping (quality and range) (49%) and culture / the arts (44%).

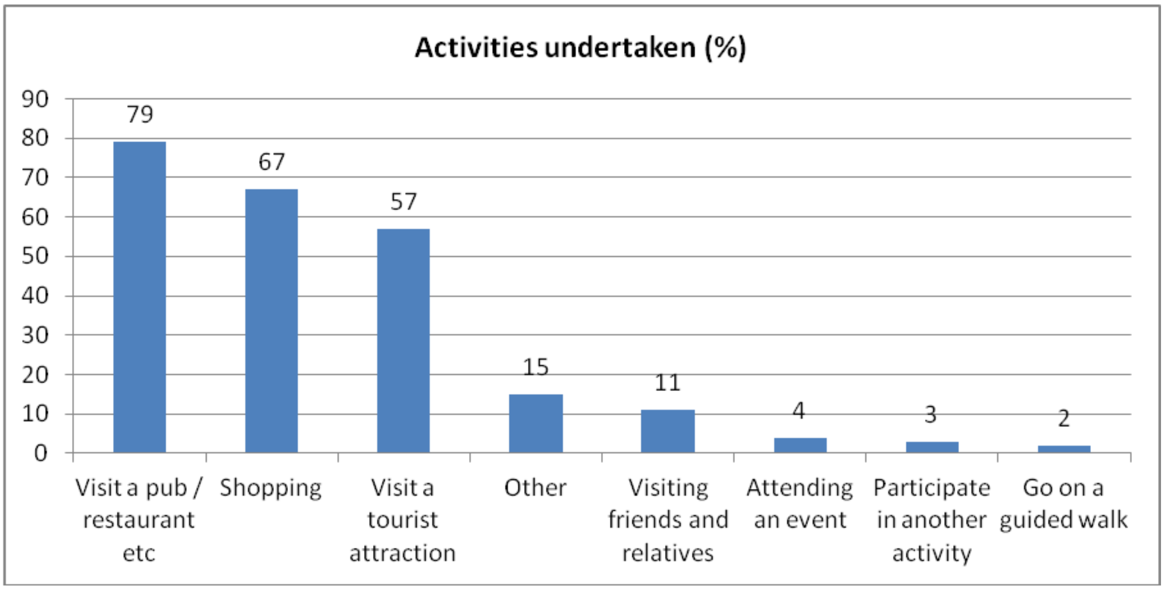
Here visiting friends and relatives ranked amongst the top factors which had no influence on visitors' decision to visit Canterbury (88%), despite the Cambridge Model report suggesting 32% of staying visitors stayed with friends and relatives on their visit – the top accommodation choice. Access / facilities for disabled visitors (93%), ease of booking (91%) and special interest activities (91%) ranked as the top three factors of no influence on the decision to visit Canterbury.



Source: *Canterbury Visitor Survey 2012*

5.4 Activities / Behaviours

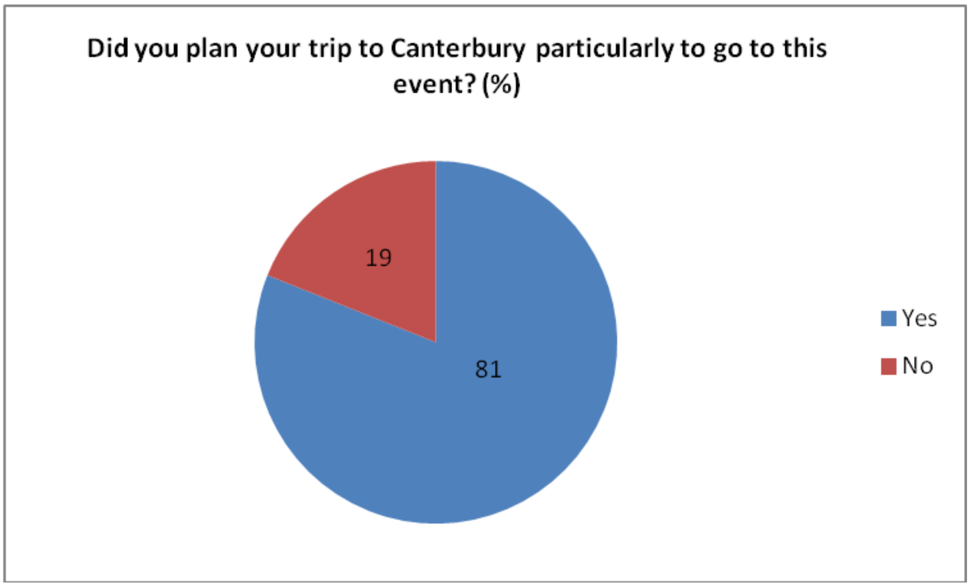
Having identified what the main motivations behind decisions to visit are, the Canterbury Visitor Survey can also help us identify their behaviours once in the destination.



Source: *Canterbury Visitor Survey 2012*

As the above graph suggests, visiting a pub / restaurant is the most common activity undertaken whilst in Canterbury (79%), followed by shopping (67%) and visiting a tourist attraction (57%). These are fairly closely in line with the key influencing factors for visits to the area, with good shopping, visitor attractions and fine dining ranking 2nd, 4th and 6th here respectively - suggesting that many visitors are actually undertaking the activities that motivated them to visit the area.

Looking at both the Canterbury and Kent Visitor Surveys, we can see that attending an event ranks quite low amongst the activities undertaken (4% and 10% respectively, although possibly impacted by when the fieldwork took place). When we aggregate event feedback forms from Canterbury Anifest, the Canterbury Festival, the Canterbury Food & Drink Festival and the Marlowe Theatre, we see that around 39% of respondents indicated they were not local, and of these, 81% of visitors made their trip to the region specifically for that event. It would therefore seem that although Canterbury's events have a largely local audience, for non-locals, Canterbury's events are a good pull for visiting the area.



Source: *Individual event surveys*

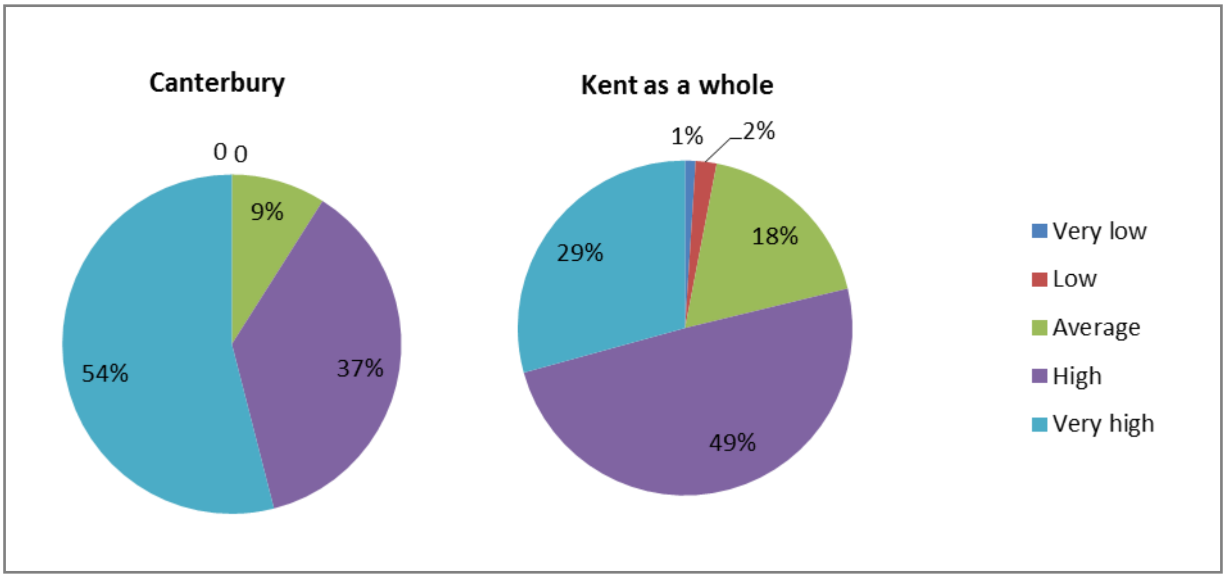
5.5 Average length of trip

From the Canterbury Visitor Survey we can see that day visitors from home spent, on average, 6.07 hours in the city, compared to 5.27 hours for day visitors on holiday. Staying visitors are also shown to have spent 3.71 nights in Canterbury on average.

Research from Whitefriars into those shopping within the centre indicates the average dwell time within Whitefriars itself to be around 59 minutes, with dwell time in the city increasing to between 111 and 116 minutes. However we must note that responses to this survey include both visitors and residents of the area.

5.6 Satisfaction

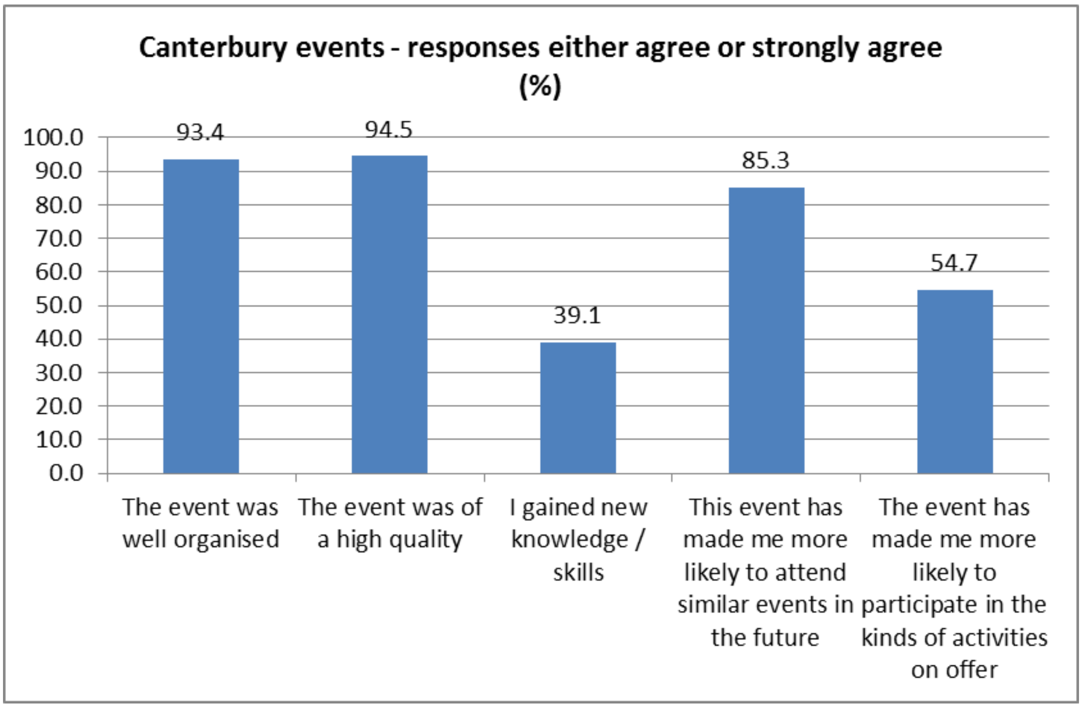
From both the Canterbury Visitor Survey and the Kent 2010 Visitor Survey report, we can see that visitors to Canterbury have very high levels of enjoyment, with 99% and 91% of visitors rating their enjoyment of the area as either high or very high respectively. This is in comparison to 78% for Kent as a whole (according to the Kent 2010 survey report), with 49% rating their enjoyment as high and 29% very high. In fact here, Canterbury ranks higher than any other destination within Kent.



Source: *Kent 2010 Visitor Survey report*

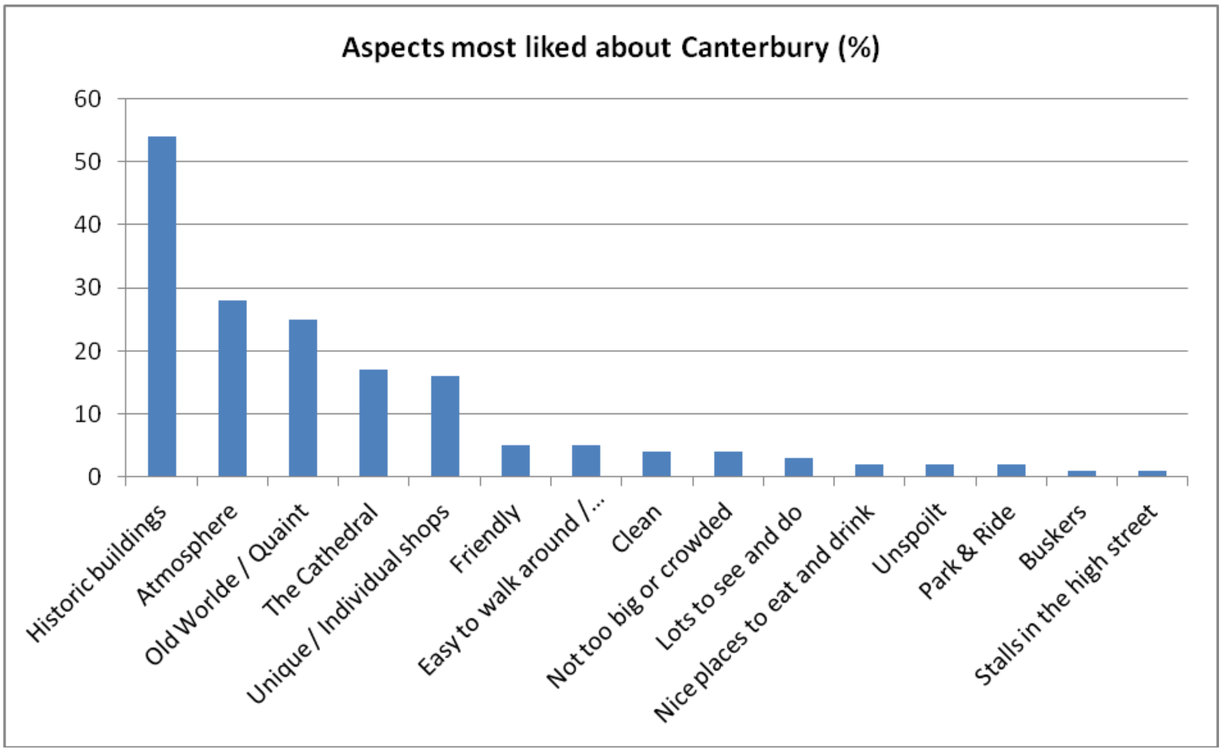
These high levels of satisfaction are supported by the levels of enjoyment recorded at individual attractions and events in Canterbury. For research conducted by Canterbury Cathedral between mind-June and the end of July 2012, 97% of visitors said their enjoyment was either good or excellent. This is echoed in aggregated data from the Canterbury Food & Drink Festival, Canterbury Anifest and Canterbury Festival where 99% of all attendees either agreed (32%) or strongly agreed (67%) that they enjoyed themselves at the event.

In fact, from the aggregated event data we see that not only did 93.4% and 94.5% of respondents agree or strongly agree that the events were well-organised and of high quality respectively, but also that 85.3% agree or strongly agree that they are now more likely to attend similar events in the future and 54.7% more likely to participate in the kind of activities on offer.



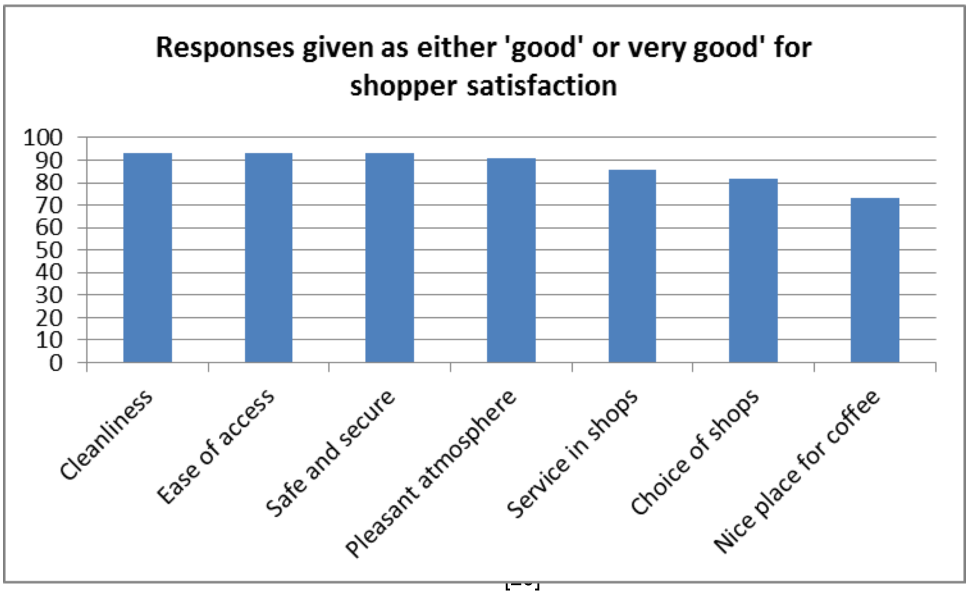
Source: *Individual event surveys*

The Canterbury Visitor Survey explores satisfaction further, and asks visitors what the aspects they most enjoyed about their visit were. Historic buildings, which ranked first in the key motivating factors to visit the area, tops the ranking here as well. The atmosphere, old worlde / quaint feel of the area, Canterbury Cathedral and the unique and individual shops all follow next.



Source: *Canterbury Visitor Survey Report*

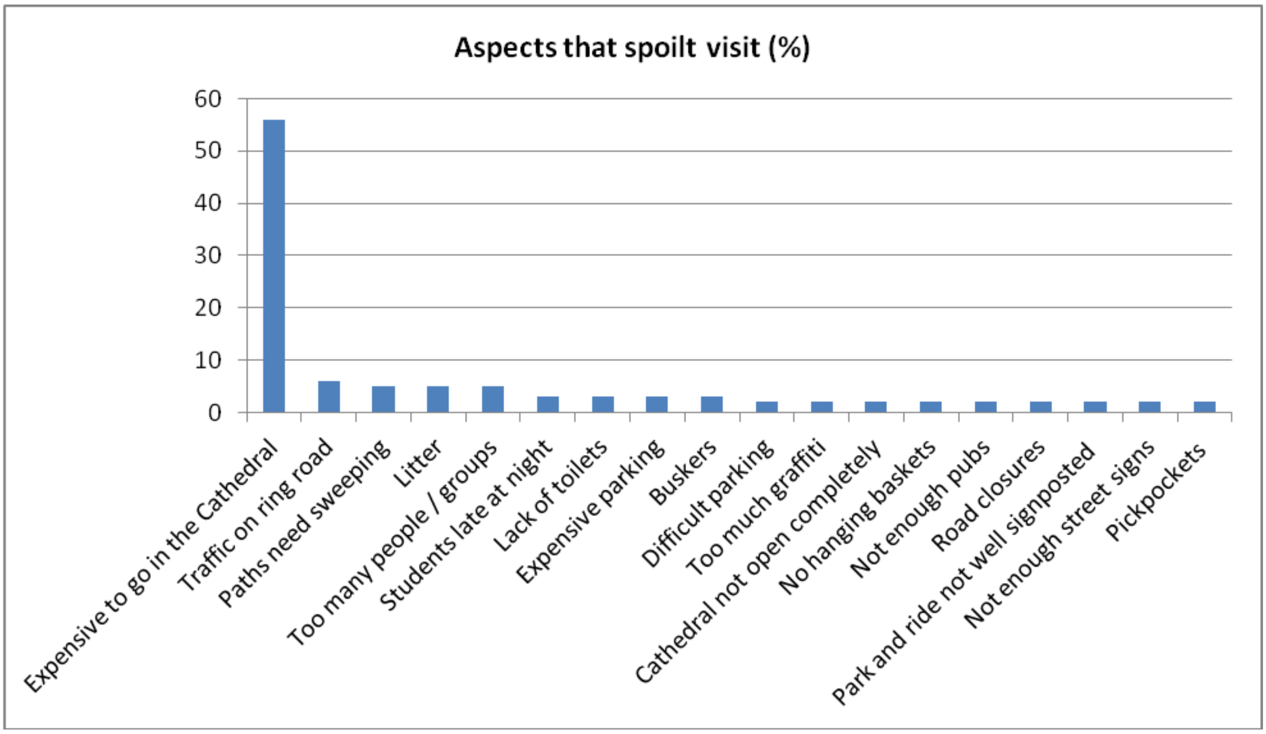
Research conducted by Whitefriars allows us to break down the shopper satisfaction for a range of different factors within the overall shopping experience. The percentage of responses given as either ‘good’ or ‘very good’ (based on an overall average from research conducted over Spring and Autumn across a number of years) are show below:



Source: *Whitefriars Survey*

Strong results are seen across the different factors with between 93% and 73% of all responses given being either 'good' or 'very good'. Here cleanliness ranked the highest, followed by ease of access and feeling safe and secure. Overall it seems that Whitefriars provides a very positive shopping experience for its shoppers.

Respondents to the Canterbury Visitor Survey report were also asked if their visit to Canterbury had been spoilt in any way. Here just 64 respondents claimed that it had, and were asked to explain their answer. Here, the cost of entering Canterbury Cathedral topped the bill by a considerable amount at 56% (although representing just 36 responses and 9% of the whole survey sample), compared to the next highest, traffic on the ring road, at just 6%. However, when we look into research conducted by Canterbury Cathedral, we see that visitors to the attraction rated value for money as mainly excellent or good, with only 3% of visitors rating this as poor. As already discussed, 97% of visitors also rated their enjoyment of the Cathedral as either excellent or good.



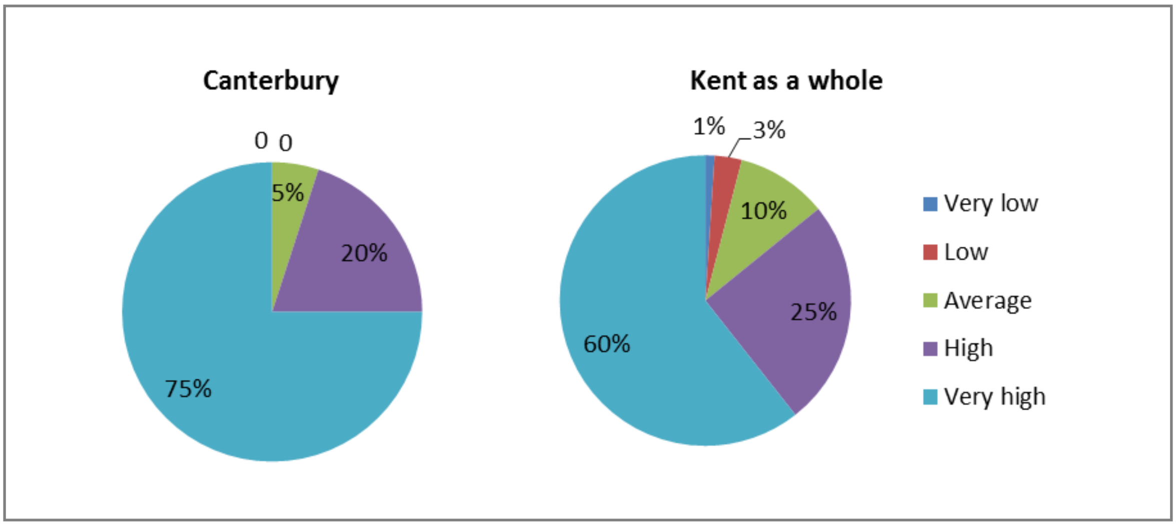
Source: *Canterbury Visitor Survey Report*

Research from Canterbury Christchurch University also gives us an insight into the experiences of students when studying in the city. Here students often referred to them 'feeling safe' within Canterbury, related not only to the campus security, but also the compact and friendly nature of the city centre. Students also emphasised the diversity of both rural and urban landscapes on their doorstep.

On visit days, 81% of the sample visited the city centre as part of their trip. Alongside getting a general feel for the city, students often ate in restaurants or cafes and went shopping. Just 24% visited the Cathedral (likely due to time restraints). These visit days had a positive effect on students' feelings about studying in Canterbury, often reinforcing those feelings highlighted above.

5.7 Recommendation

In line with the high levels of enjoyment, Canterbury is highly likely to be recommended by visitors too. In the Canterbury Visitor Survey, 99% of visitors claimed their likelihood to recommend the destination was either likely (8%) or very likely (91%). This is mirrored in the Kent 2010 survey report, with 95% giving the same ratings here. In this report, Kent as a whole sees 85% of visitors claiming their likelihood to recommend as being either high (25%) or very high (60%) and so here Canterbury, again, seems to rank higher than any other destination in Kent.

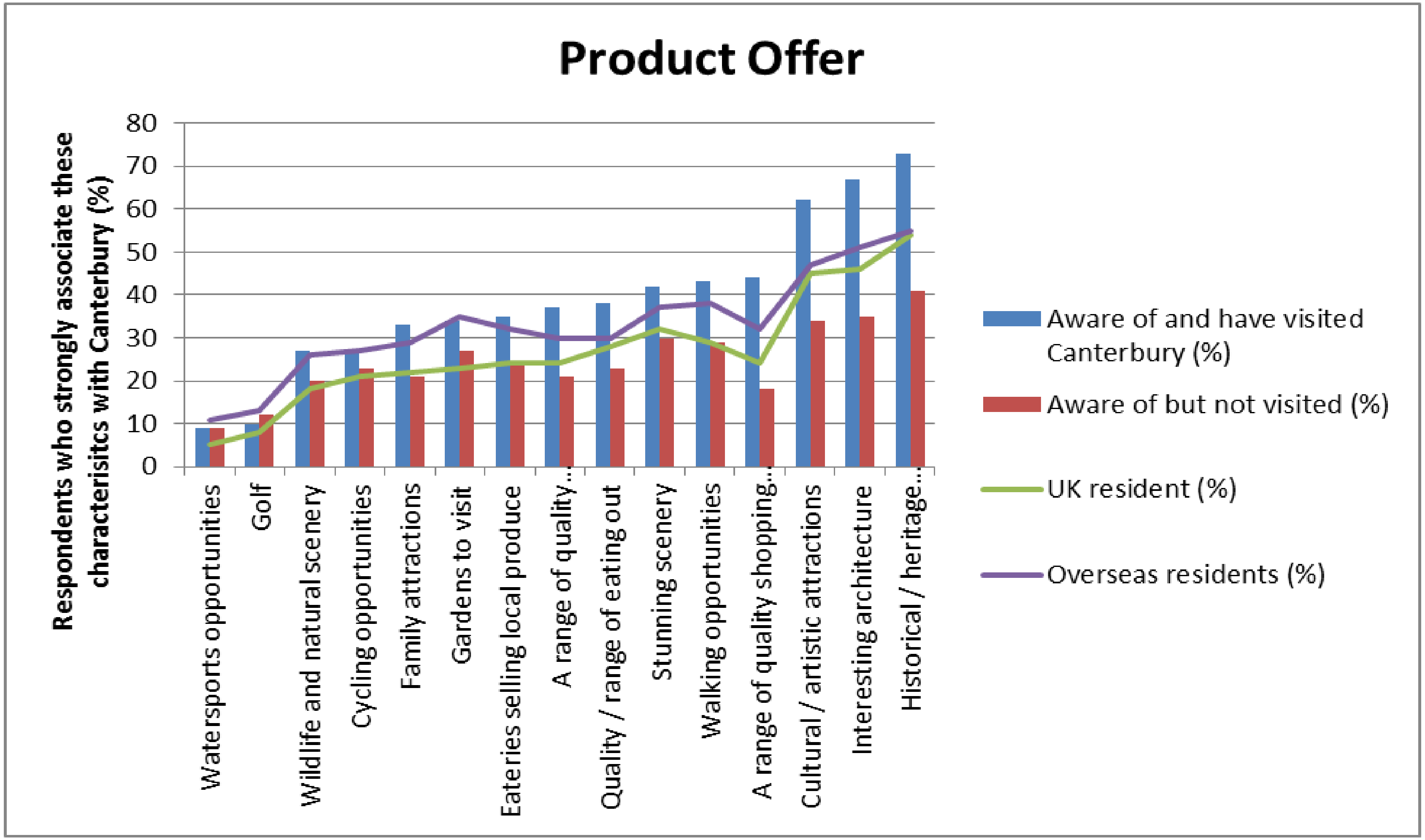


Source: *Kent 2010 Visitor Survey report*

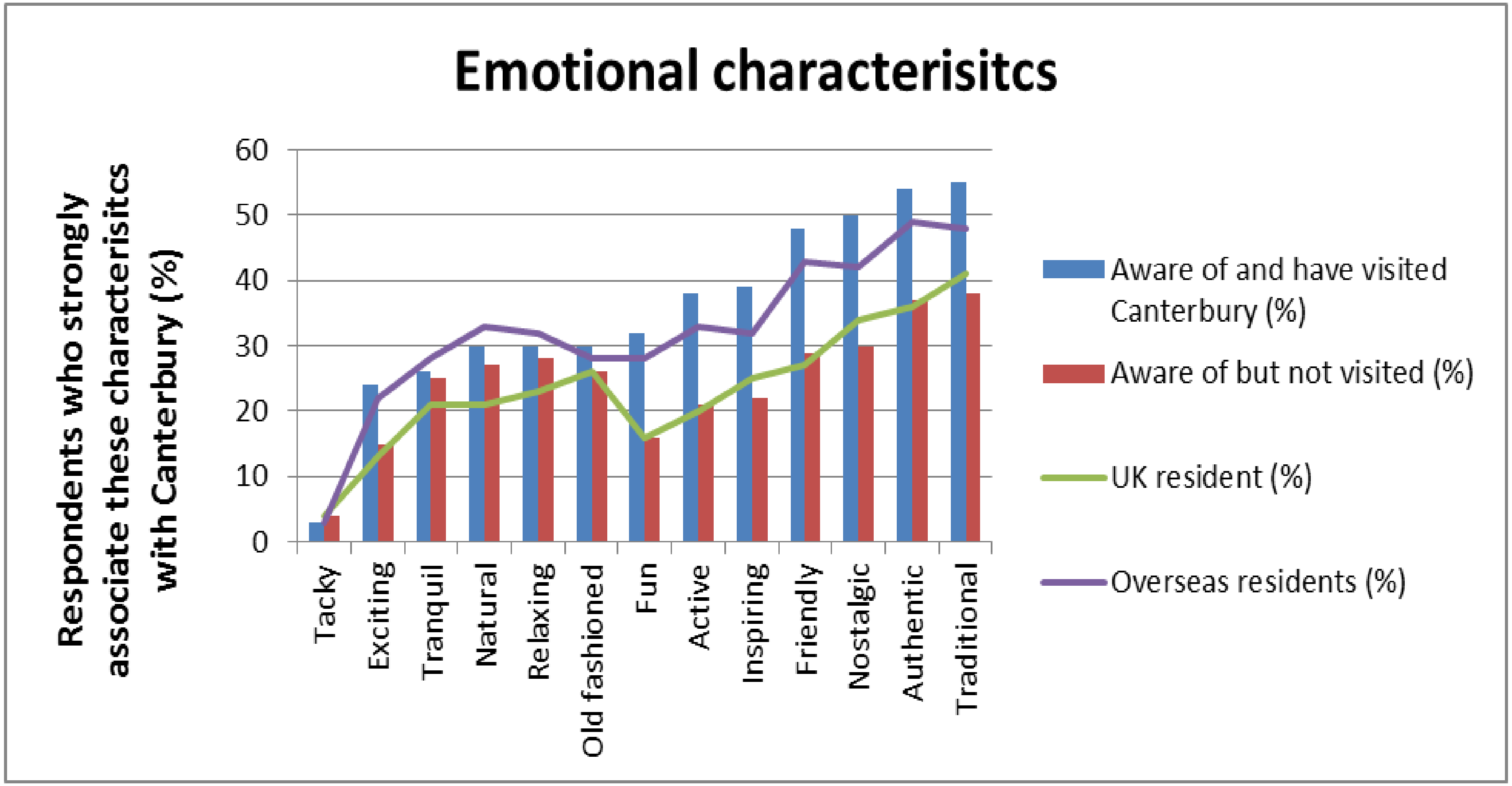
5.8 Perception

Although the above visitor surveys focus on the behaviours of actual visitors to the area, the Visit Kent 2012 Perception Research has a much broader reach and collects information on the perceptions of Canterbury from both visitors and non-visitors to the area. It's clear that there are differences between what people who have never visited *think* Canterbury is like, and what those who've visited *actually experience*.

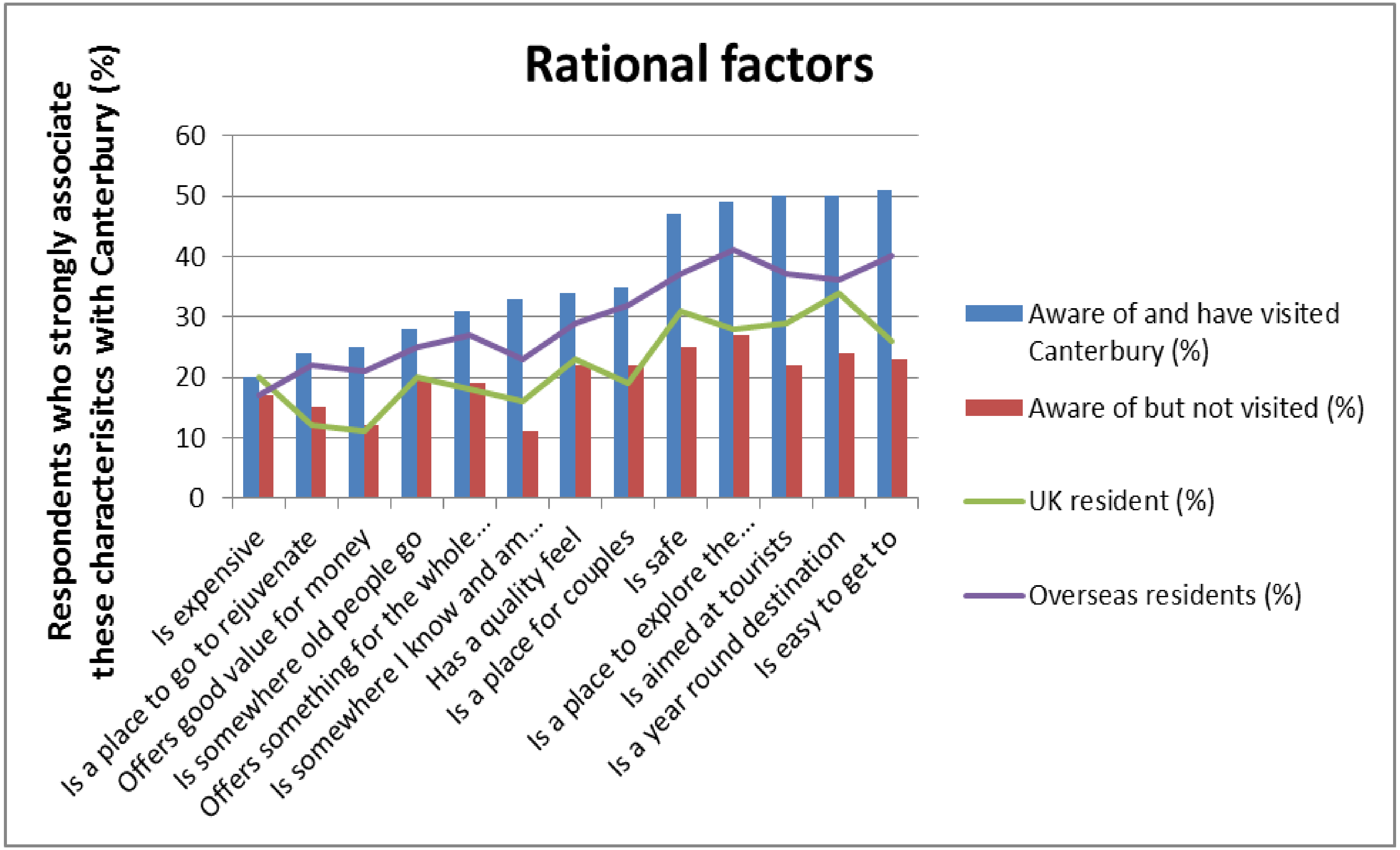
From the Visit Kent Perception Research, the perception of Canterbury (and other Kent destinations) amongst both visitors to the area and those who were merely aware of the destination (alongside both domestic and overseas visitors) was identified. From a list of prompted associations, respondents were asked for the extent to which they agreed with their association with the destination. The percentage of respondents who strongly agreed with the associations, broken down according to whether or not they had visited, and by UK or overseas, can be seen below:



Source: *Visit Kent Perception Research 2012*



Source: *Visit Kent Perception Research 2012*



Source: *Visit Kent Perception Research 2012*

Interestingly, in almost all cases (excluding golf, water sports opportunities and ‘tacky’), we see a higher percentage of those who have visited the area strongly associating the characteristics with Canterbury, than those who were merely aware of the destination. Similarly, excluding the negative associations of being expensive and tacky, overseas respondents are more likely than UK respondents to associate Canterbury strongly with the positive characteristics.

Appendix 4 places the above results within the context of the perceptions of other destinations within Kent, and from this Canterbury can be seen to excel above other destinations across a range of associations. These are shown in the table below. Those in bold indicate where Canterbury ranks considerably higher than other locations:

Product offer	Rational factors	Emotional characteristics
A range of quality shopping offers	Is expensive	**Inspiring**
A range of quality accommodation	Is aimed at tourists	**Authentic**
Interesting architecture	**Is a year round destination**	**Nostalgic**
Cultural / artistic attractions	Is safe	Old fashioned
Historical / heritage attractions	Is a place to explore the surrounding area	Friendly
Quality / range of eating out	Is easy to get to	**Traditional**

Source: *Visit Kent Perception Research 2012*

More so than other locations within Kent, Canterbury seems to be perceived as an all-year round destination, with interesting architecture and historical / heritage attractions. It is thought to be inspiring, authentic, nostalgic and traditional.

Many of the perceptions of Canterbury by visitors and non-visitors which help the destination stand out amongst others, tie in with the key influencing factors for visits to Canterbury. From the Canterbury Visitor Survey Report we saw that historic aspects / heritage rank highest as the key influencing factor for visits to Canterbury, as mentioned by 83% of people (also coming out top in the Kent 2010 Survey). This was followed by good shopping (quality and range) (49%) and culture / the arts (44%) – all standing as the top perceptions made of Canterbury by both visitors and non-visitors.

The most common activities undertaken whilst in Canterbury were also shown in the Canterbury Visitor Survey to be visiting a pub / restaurant (79%), shopping (67%) and visiting a tourist attraction (57%). These again tie in with the strong perceptions show to be held of the area's quality and range of eating out and shopping options, and the historical / heritage attractions of the area, as made by visitors and non-visitors alike.

Research conducted by Canterbury Christ Church University also gives us interesting insights into the perceptions of Canterbury as held by students in the city, many of which feed into the perceptions shown above.

Asked for the factors important in their decision to study at CCCU, many students referred to:

- the city's proximity to London and good transport links, enjoying being able to live in a compact, quiet and green city within a short distance of the Capital.
- the compact nature of the city (communicated to prospective students before coming to the city) - often linked to feelings of comfort and safety when studying in a new city.
- the historical and cultural nature of Canterbury was considered more a bonus than a driving force behind their decision to study here.

Canterbury therefore has some very clear and consistent associations in the mind of visitors, non-visitors and students of the city alike, many of which correspond to the main motivations to visit the city and the activities undertaken whilst there.

6. How does Canterbury compare with other UK towns and cities?

6.1 Canterbury's position within Kent

Looking first at Canterbury's position within Kent, we can see that the area enjoys:

- the highest number of visitors compared to any other district (excluding Dartford whose visitor numbers include visitors to Bluewater Shopping Centre);
- the highest volume of overseas visitors;
- the highest level of awareness amongst overseas visitors and non-visitors to Kent; and the second highest amongst domestic;
- more positive associations made by both visitors and non-visitors alike when compared to any other destination within Kent.

6.2 Canterbury's position in comparison to key competitors outside Kent

According to the International Passenger Survey, Canterbury regularly dips in and out of the top 20 UK cities based on overseas visitor numbers, ranking 20th in 2011 and 19th in 2009. Outside London, the only nearby destination which consistently ranks in the top 20 cities is Brighton & Hove, so Canterbury faces competition from across the country. Data from VisitEngland's 2012 'Great Britain Tourism Survey' puts Canterbury below the top 20 cities for domestic visitors too. And Canterbury was not one of Trip Advisor's 2013 Travellers Choice Awards top 10 cities/towns.

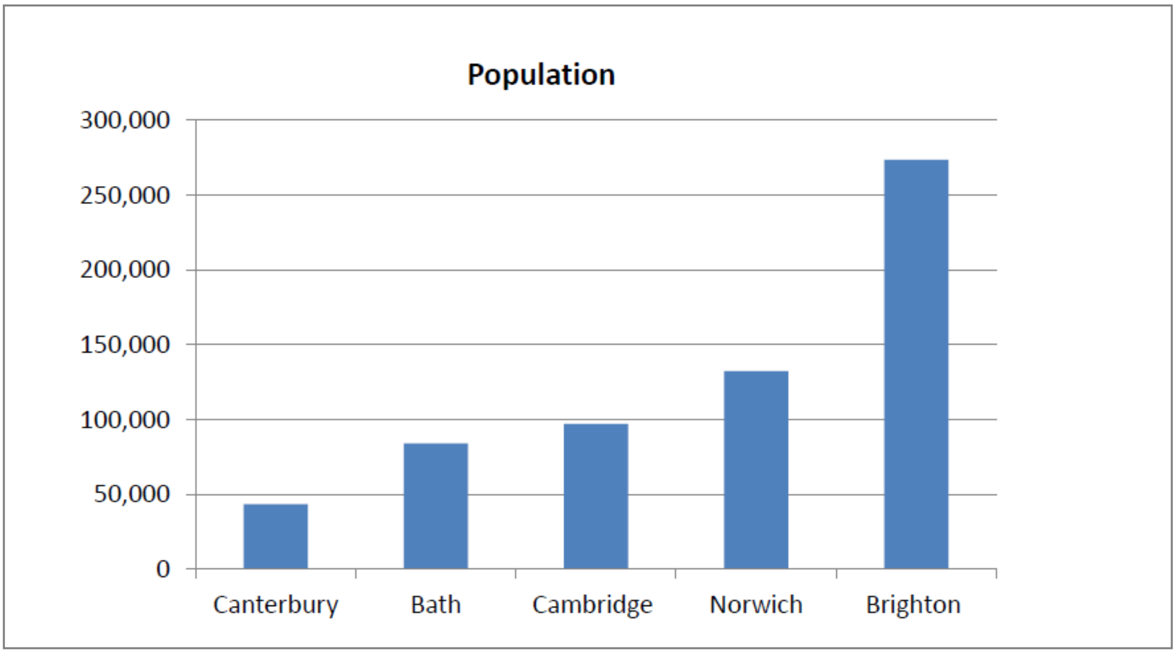
Top 20 UK cities for overseas visitor numbers

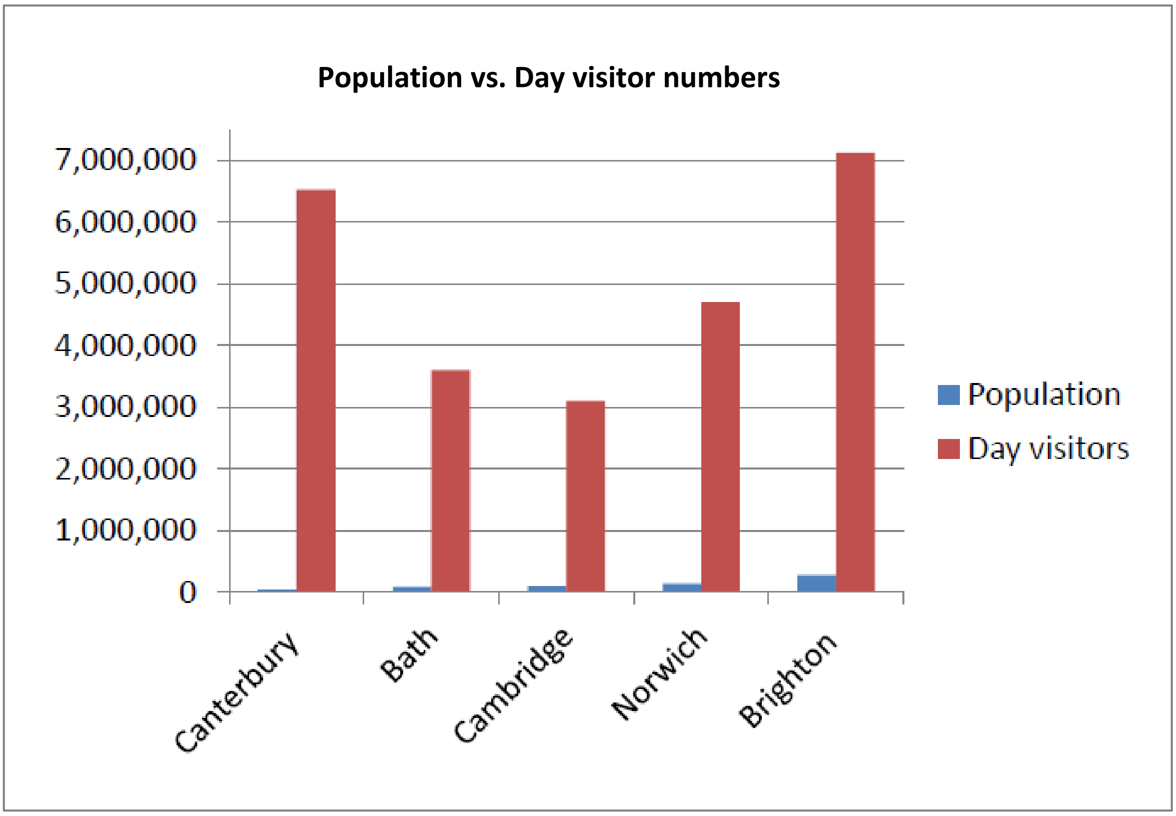
2012			2011			2010			2009		
Rank	Town/City	Visits (000s)	Rank	Town/City	Visits (000s)	Rank	Town/City	Visits (000s)	Rank	Town/City	Visits (000s)
1	London	15,461	1	London	15,289	1	London	14,706	1	London	14,211
2	Edinburgh	1,256	2	Edinburgh	1,342	2	Edinburgh	1,305	2	Edinburgh	1,324
3	Manchester	932	3	Manchester	934	3	Manchester	811	3	Manchester	800
4	Birmingham	713	4	Birmingham	733	4	Birmingham	740	4	Birmingham	709
5	Liverpool	550	5	Liverpool	545	5	Glasgow	551	5	Glasgow	623
6	Glasgow	521	6	Glasgow	475	6	Liverpool	452	6	Liverpool	458
7	Oxford	430	7	Oxford	465	7	Oxford	412	7	Bristol	421
8	Cambridge	398	8	Bristol	430	8	Bristol	377	8	Oxford	416
9	Bristol	395	9	Cambridge	387	9	Cambridge	367	9	Cambridge	400
10	Brighton / Hove	345	10	Leeds	306	10	Brighton / Hove	303	10	Brighton / Hove	330
11	Cardiff	301	11	Brighton / Hove	304	11	Bath	263	11	Cardiff	313
12	Leeds	299	12	Cardiff	291	12	Cardiff	260	12	Inverness	248
13	Nottingham	215	13	Aberdeen	250	13	Inverness	238	13	Nottingham	244
14	Inverness	213	14	Nottingham	244	14	Newcastle-upon-Tyne	224	14	Leeds	231
15	Newcastle-upon-Tyne	212	15	Newcastle-upon-Tyne	239	15	Nottingham	224	15	Aberdeen	216
16	Bath	211	16	Bath	232	16	York	224	16	York	215
17	Aberdeen	208	17	York	222	17	Leeds	213	17	Newcastle-upon-Tyne	213
18	York	199	18	Inverness	215	18	Aberdeen	168	18	Bath	212
19	Reading	196	19	Windsor	211	19	Southampton	164	19	Canterbury	197
20	Windsor	182	20	Canterbury	191	20	Windsor	162	20	Reading	187

Source: *International Passenger Survey*

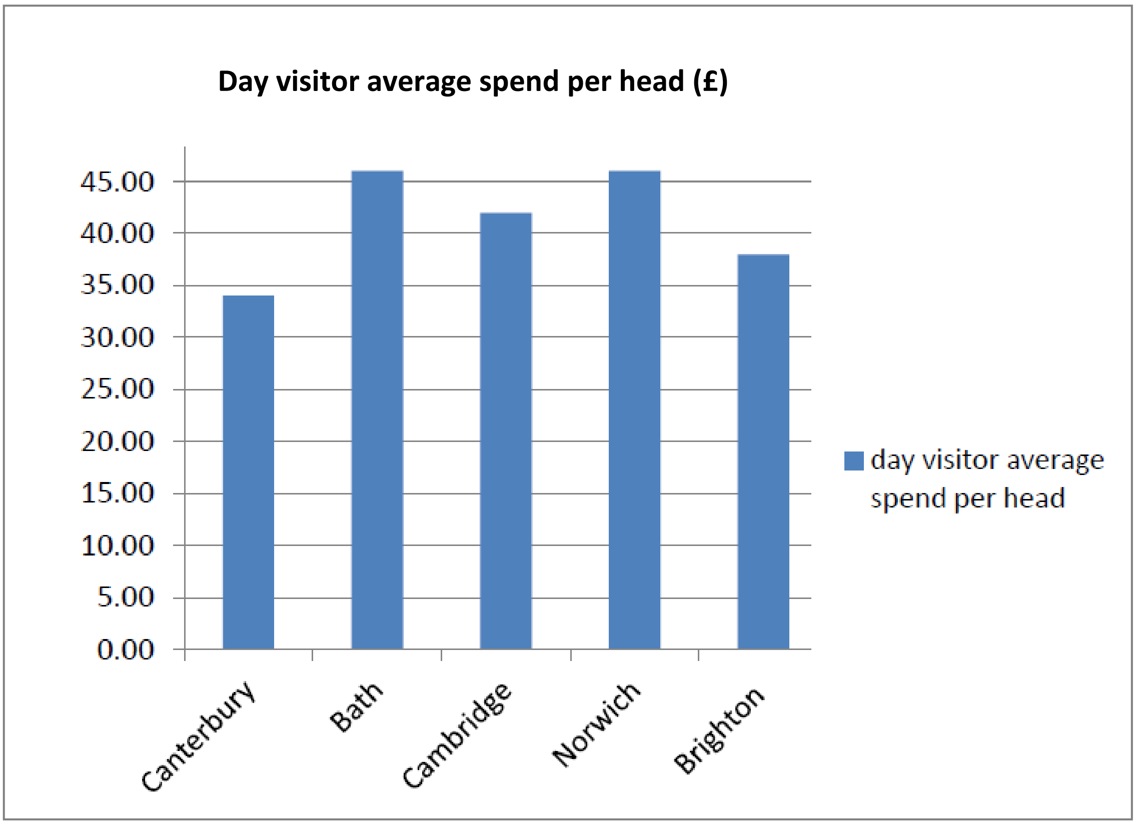
Although it has a strong position within Kent, Canterbury faces considerable competition in the UK in attracting both domestic and overseas visitors.

This can be seen clearly when we compare Canterbury's position to a selection of key UK competitor destinations for which comparable UK data is available - Bath, Cambridge, Norwich and Brighton.

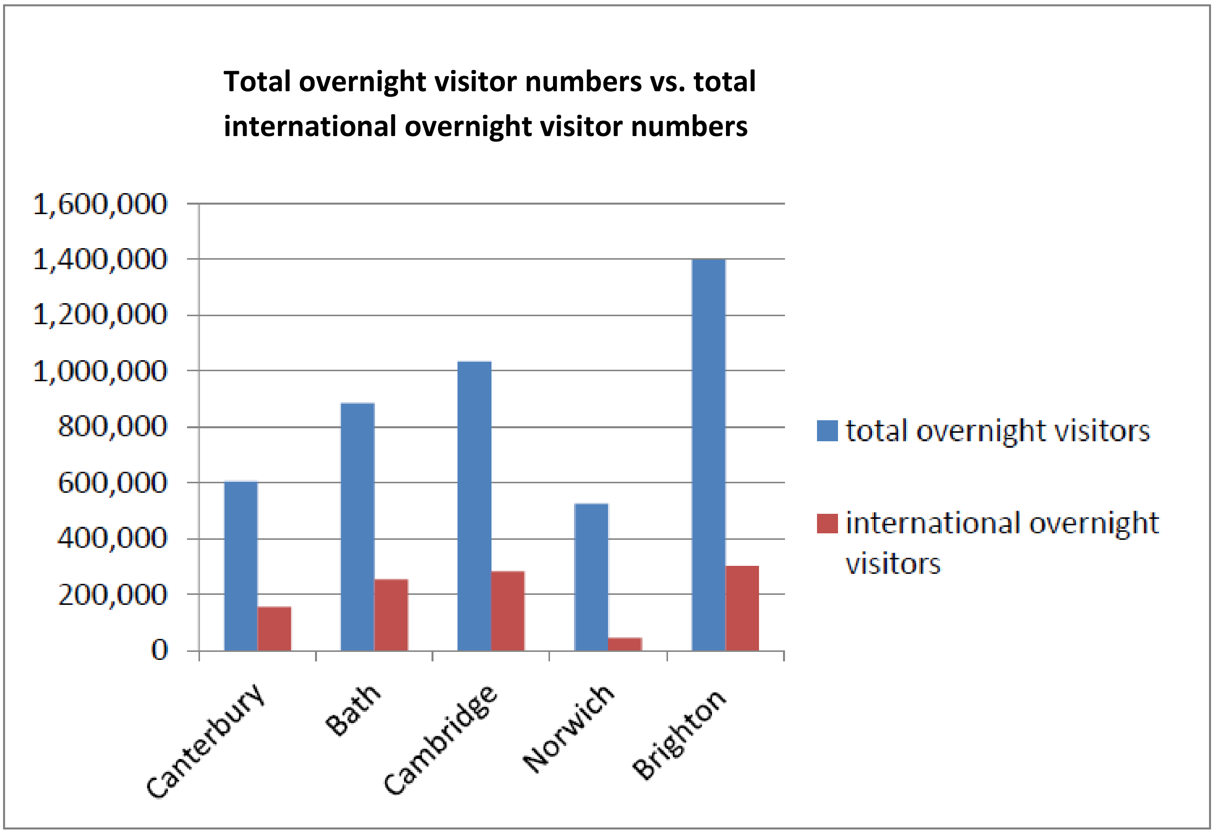




Looking at the ratio of day visitors to population amongst Canterbury and the comparator cities, we can see that, in all cases, visitors significantly outrank the local population. Amongst the comparator cities, there are between 26 and 46 day visitors to every resident. However in Canterbury, with a smaller population than the other cities, there are approximately 150 day visitors to every resident, putting Canterbury on a par with places like Venice, which are recognised as having more visitors than the place can comfortably accommodate at certain times of the day and year.

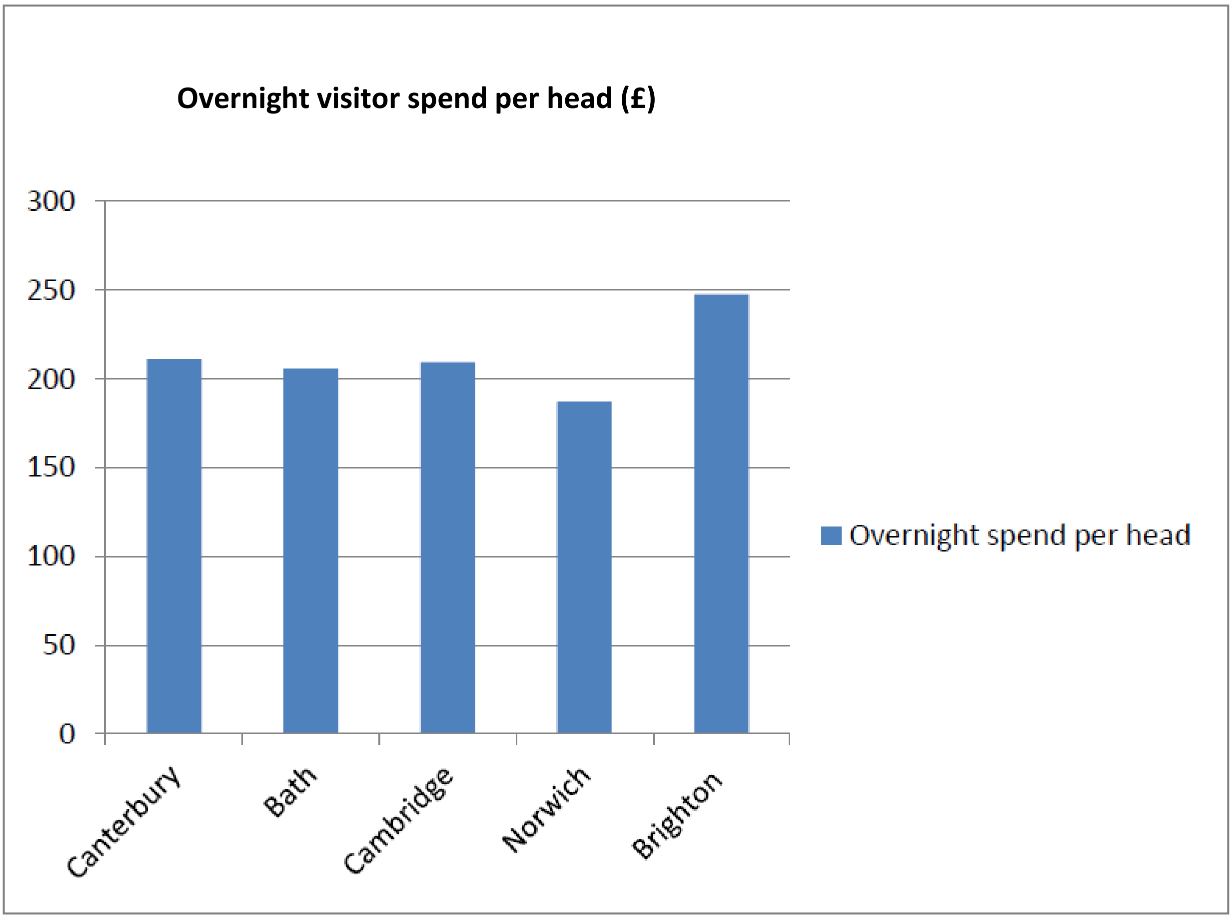


As the above graph shows, day visitors to Canterbury are also spending less per head than any of the other comparator cities. This may be attributed to the length of day trips spent in the city (it may not be a full day), the profile of visitors, spend opportunities and the significance of school trips and coach parties to the area (both markets which have a relatively low average spend per head).



Looking now at overnights visitors to Canterbury, we can see that only Norwich receives fewer overnight visitors and international overnight visitors. Canterbury may be close to mainland Europe, but it would seem that relatively few of its international visitors stay overnight. Brighton and Norwich both receive high numbers of conference visitors, but in Brighton in particular, venue and room infrastructure for conference tourism significantly influences the number of overnight visitors.

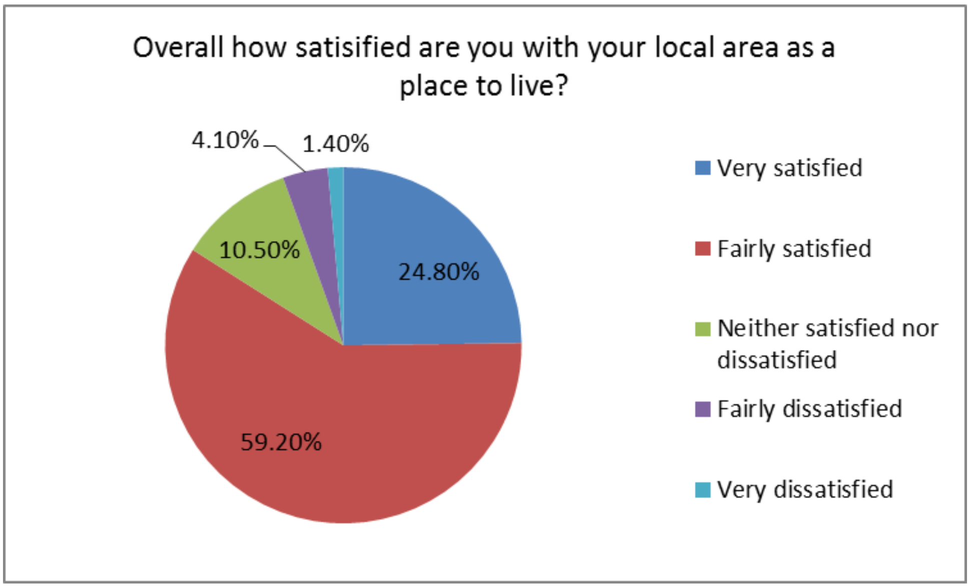
However, Canterbury's spend per head for staying visitors just exceeds that of Bath, Cambridge and Norwich. Brighton has the highest overnight spend of the five, most probably because of its strong conference sector.


Overnight visitor spend per head (£)
300
250
200
150
100
50
0
Canterbury
Bath
Cambridge
Norwich
Brighton
Overnight spend per head

7. What do residents think about the city?

7.1 Satisfaction with Canterbury as a place to live

From the Canterbury Resident Survey, 84% of residents can be seen to be either fairly or very satisfied with Canterbury as a place to live.

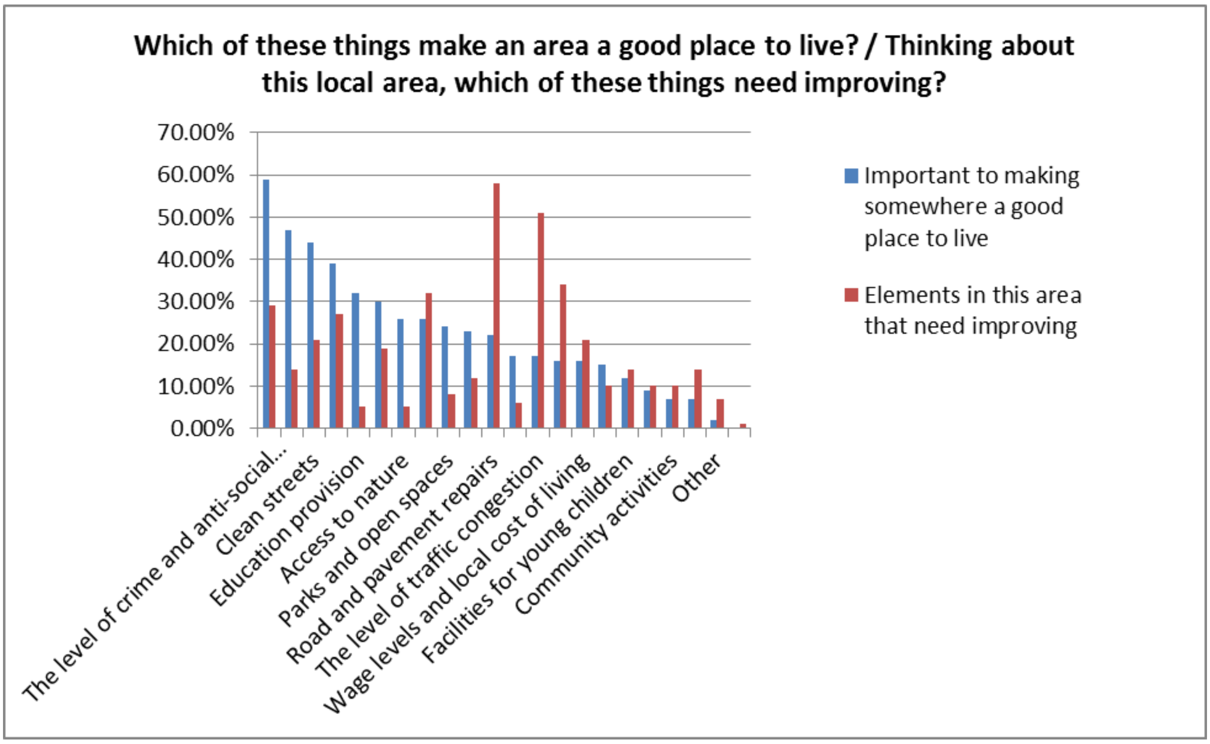


Source: *Canterbury City Council 2012 Residents Survey*

7.2 What makes an area a good place to live and what elements need improving here?

Through asking residents what makes an area a good place to live, and whether or not these areas need improving in Canterbury, we can explore the above results further. From the Canterbury Resident Survey again, it can be seen that the level of crime and anti-social behaviour is thought to be the key factor in making somewhere a good place to live (59%), followed by health services (47%) and clean streets (44%) – priorities which have remained similar as far back as 2003. Interestingly though, 29% of residents saw crime and anti-social behaviour as something that needs improving in Canterbury, 14% healthcare and 21% clean streets. Road and pavement repairs topped the list of things to improve however (58%), with traffic congestion (51%) and activities for teenagers (34%) following – matching the priorities given in 2010.

Positively, those aspects thought to make an area a good place to live are not those aspects which top the list of elements that need improving, reinforcing the high levels of satisfaction shown above. However, where red data exceeds blue considerably, areas for improvement are clearly defined.



Source: *Canterbury City Council 2012 Residents Survey*

7.3 Service use and satisfaction within Canterbury

The Canterbury Resident Survey also gives us an idea of how often certain services (including those which are leisure related) are used by residents and their level of satisfaction with them. The following question was posed:

Canterbury City Council is a key provider of public services locally, so we would like your views on some of the services we provide. ***How satisfied are you with each of the following services****?*

The top 5 services achieving positive results of either 'very' or 'fairly satisfied' were:

- Parks and open spaces (70.2%); keeping the area clean (70.2%); bin collection (67.6%); recycling collection (67.3%); museums / galleries (62.9%).

And the top 5 services achieving negative responses of 'fairly' or 'very dissatisfied' were:

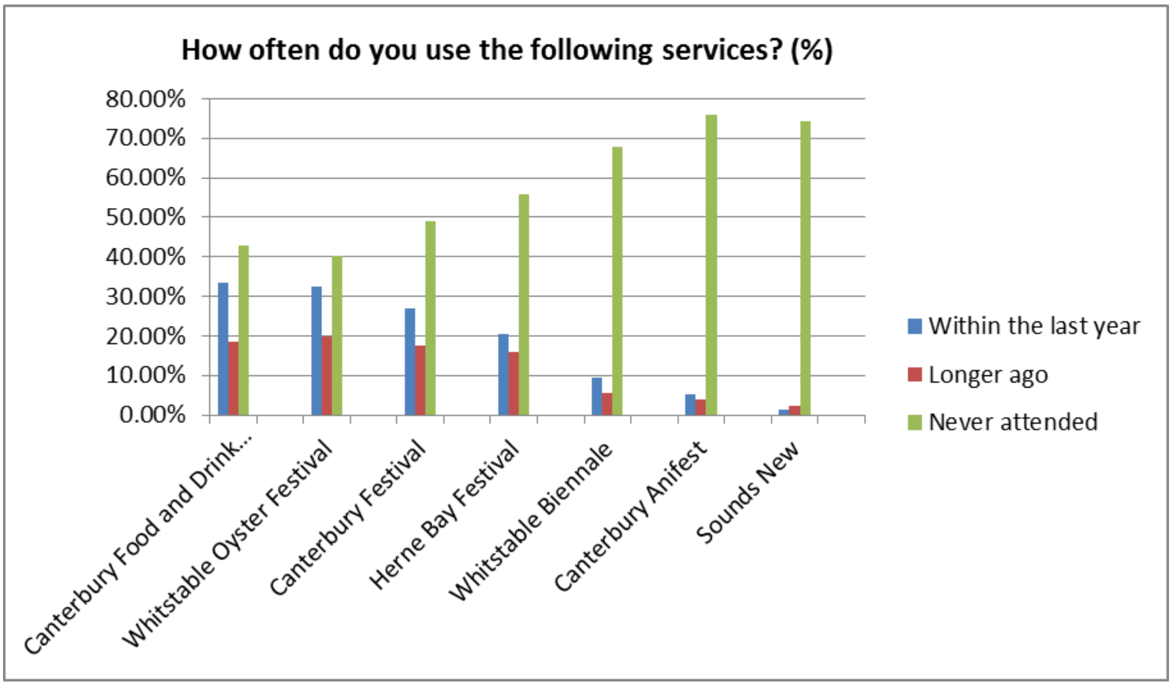
- Public toilets (30.1%); enforcement activity (22.8%); bin collection (22.3%); recycling collection (21.6%); keeping the area clean (14.9%)

A full table of results can be found in **appendix 5.** Opinion seems to be split on the level of satisfaction for some services, with keeping the area clean, bin and recycling collection all ranking highly for both positive and negative levels of satisfaction. However, parks and open spaces, along with museums / galleries (which ranked highly in terms of satisfaction), only saw 9.8% and 6% of responses as either fairly or very dissatisfied respectively.

Residents were then asked how often various services within the city were used. The full results are presented in **appendix 6.**

- Looking first at the sports and leisure facilities of the area, Kingsmead Leisure Centre seems to be the most widely used with 1.6% of respondents using it every day, 9.2% at least once a week and a further 4.6% once a month.

- Looking next at the festivals and events of the area, it can be seen that the Canterbury Food and Drink festival is the most widely attended by residents within the last year (33%), followed by the Whitstable Oyster Festival (32.6%) and Canterbury Festival (26.8%).



Source: *Canterbury City Council 2012 Residents Survey*

- For the museums and galleries of the Canterbury area, The Beaney Art Museum tops the list with 15.2% of residents visiting about once a month, followed by the Horsebridge Arts and Community Centre at 5.6%.

- Looking at theatres and concert halls, the Marlowe Theatre, in comparison to Kings Hall, is much more widely attended by residents, with 5.3% attending once a month (compared to 0.4%) and 29.5% having attended within the last 6 months (compared to 8.1%).

Those residents who have never used (or experienced) any of the above were then asked to explain why. Full results are presented in **appendix 7**.

For sports and leisure facilities in general, the most common responses were that they were of no interest to the respondent and their location / access. For festivals and events however, whilst ‘no interest’ was again a common response, being unaware was the most common response given (57.4% for Sounds New; 56.8% for Canterbury Anifest). Museums and galleries also saw ‘no interest’ and being unaware as common responses, with 33.7% being unaware of the Beaney Art Museum (for example). For the Marlowe Theatre, being too expensive was given as the reason 31.9% of residents had never visited, whilst 30.7% of respondents were unaware of Kings Hall, compared to just 2.7% for the Marlowe. Clear avenues for widening the reach of marketing activities for certain services can therefore be identified if residents of Canterbury are to engage with them more widely.

8. Appendix

Appendix 1 – Mosaic public sector type

The Mosaic types which have been highlighted in red represent those which over-index more than 1.5 times the average.

Mosaic Public Sector Type	Count	%	UK Population (Minus Kent and Medway)	%	Index
1 – Rural families with high incomes from city jobs	174	1.50	550,993	0.90	168
2	177	1.53	695,958	1.13	135
3	91	0.79	638,372	1.04	76
4	157	1.36	836,088	1.36	100
5	410	3.54	1,710,647	2.79	127
6	248	2.14	1,591,925	2.59	83
7	304	2.63	1,263,300	2.06	128
8	119	1.03	742,256	1.21	85
9 – Successful older business leaders living in sought after suburbs	414	3.58	965,406	1.57	228
10	82	0.71	333,486	0.54	130
11 – Creative professionals seeking involvement in local communities	303	2.62	721,170	1.17	223
12 – Residents in smart city centre flats who make little use of public services	45	0.39	153,799	0.25	155
13 – Higher income older champions of village communities	413	3.57	1,267,031	2.06	173
14 – Older people living in large houses in mature suburbs	436	3.77	1,255,806	2.05	184
15 – Well off commuters living in spacious houses in semi rural settings	492	4.25	1,291,732	2.10	202
16 – Higher income families concerned with education and careers	483	4.17	1,493,366	2.43	172
17 – Comfortably off suburban families weakly tied to their local community	587	5.07	1,732,943	2.82	180
18	278	2.40	1,399,688	2.28	105
19	380	3.28	1,895,882	3.09	106
20	92	0.79	816,389	1.33	60
21	306	2.64	1,739,710	2.83	93
22 – Busy executives in town houses in dormitory settlements	299	2.58	916,742	1.49	173
23	315	2.72	1,544,060	2.51	108

24	152	1.31	867,619	1.41	93
25	8	0.07	124,331	0.20	34
26 – Well educated singles living in purpose built flats	308	2.66	761,773	1.24	215
27 – City dwellers owning houses in older neighbourhoods	194	1.68	399,015	0.65	258
28 – Singles and sharers occupying converted Victorian houses	148	1.28	354,628	0.58	221
29 – Younger professional families settling in better quality older terraces	405	3.50	1,087,307	1.77	198
30 – Diverse communities of well-educated singles living in small, smart flats	81	0.70	254,207	0.41	169
31 – Owners in smart purpose built flats in prestige locations, many newly built	244	2.11	723,621	1.18	179
32	83	0.72	594,939	0.97	74
33	69	0.60	636,763	1.04	57
34	27	0.23	414,389	0.67	35
35	200	1.73	1,025,535	1.67	103
36	129	1.11	671,570	1.09	102
37	78	0.67	753,379	1.23	55
38	26	0.22	181,230	0.30	76
39 – Young owners and private renters in inner city terraces	115	0.99	296,883	0.48	206
40	94	0.81	466,539	0.76	107
41	54	0.47	360,658	0.59	79
42	15	0.13	742,299	1.21	11
43	139	1.20	1,484,360	2.42	50
44	103	0.89	1,124,817	1.83	49
45	191	1.65	1,977,641	3.22	51
46	227	1.96	1,305,017	2.13	92
47	242	2.09	1,436,174	2.34	89
48	146	1.26	1,277,805	2.08	61
49	64	0.55	1,136,171	1.85	30
50	107	0.92	2,027,422	3.30	28
51	200	1.73	1,598,502	2.60	66
52	90	0.78	320,720	0.52	149
53	103	0.89	438,739	0.71	125
54	184	1.59	869,425	1.42	112
55	129	1.11	579,293	0.94	118
56	85	0.73	1,018,861	1.66	44
57	25	0.22	603,307	0.98	22
58	25	0.22	313,596	0.51	42
59	21	0.18	437,107	0.71	25
60	32	0.28	554,377	0.90	31

61	29	0.25	886,016	1.44	17
62	80	0.69	366,522	0.60	116
63	52	0.45	371,702	0.61	74
64	50	0.43	424,169	0.69	63
65	60	0.52	327,129	0.53	97
66	12	0.10	174,975	0.28	36
67	55	0.48	1,591,244	2.59	18
68	53	0.46	858,229	1.40	33
69	34	0.29	1,233,899	2.01	15
99	0	0.00	394,761	0.64	0
Grand Total	**11573**	**100**	**61,405,414**	**100**	

Source: Experian Mid Year 2012 Population Estimates

It must be noted that all Kent and Medway postcodes have been removed from both the Canterbury visitor database as well as the national level database to enable comparison between the two.

Appendix 2 – K&M Group

The K&M Groups which have been highlighted in red represent those which over-index more than 1.5 times the average.

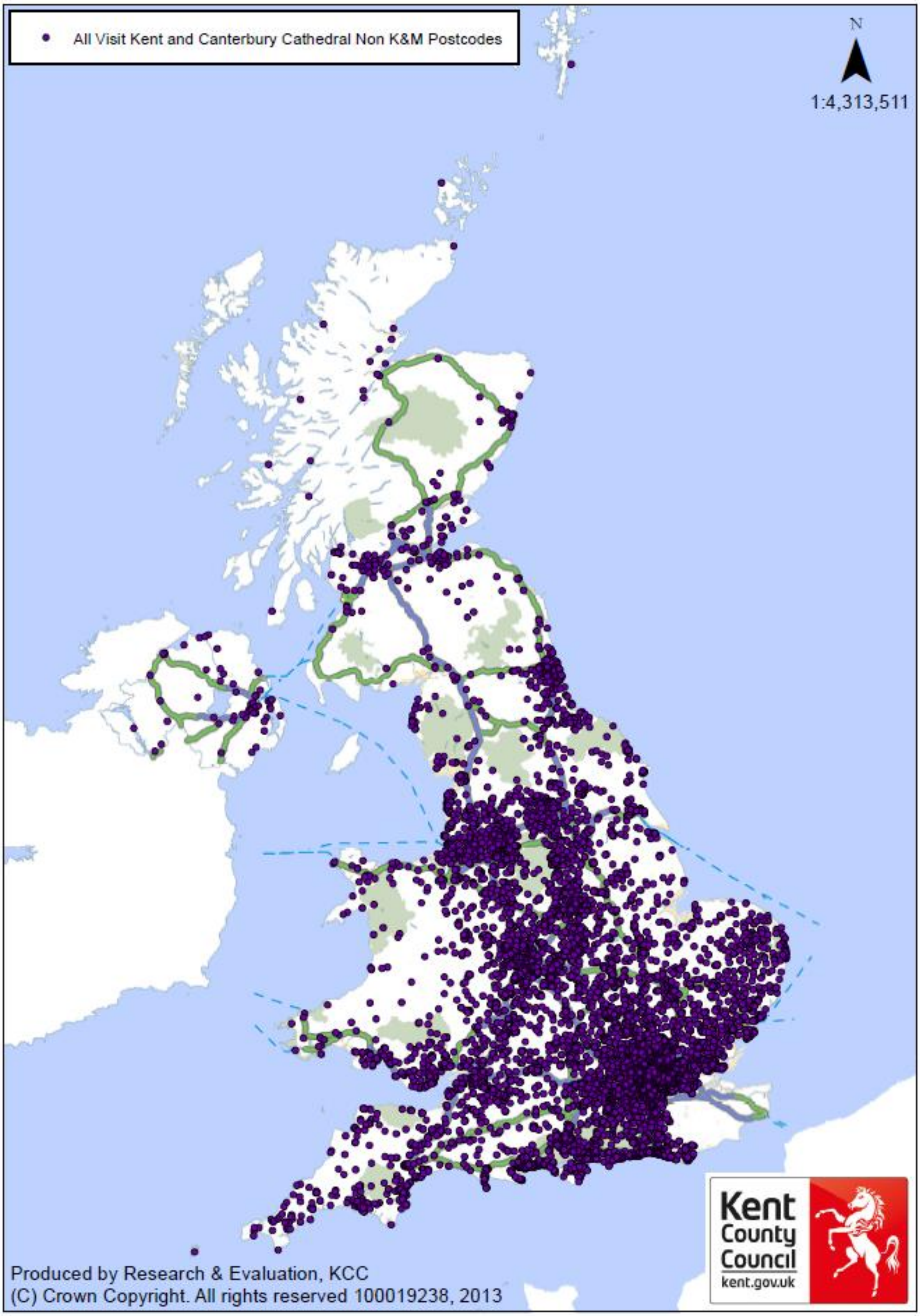
K&M Group	Count	%	UK Population (Minus Kent and Medway)	%	Index
A – Extremely affluent, well educated owner-occupiers	1878	16.23	5129818	8.35	194
B – Well off families with older children, working in managerial and professional careers	1385	11.97	4770369	7.77	154
C – Retired people living comfortably in large bungalows and houses, often close to the sea	1297	11.21	4852556	7.90	142
D	855	7.39	4675359	7.61	97
E	593	5.12	3466838	5.65	91
F – Singles and divorcees approaching retirement, mostly living in privately rented flats and bungalows	552	4.77	2584849	4.21	113
G – Younger professionals with children, some living in ethnically diverse neighbourhoods	2959	25.57	11498256	18.73	137
H	233	2.01	1606179	2.62	77
I	179	1.55	1646091	2.68	58
J	843	7.28	6593658	10.74	68
K	242	2.09	2609177	4.25	49
L	337	2.91	8068461	13.14	22
M	220	1.90	3509042	5.71	33
U	0	0.00	394761	0.64	0
Grand Total	**11573**	**100**	**61405414**	**100**	

Source: Experian Mid Year 2012 Population Estimates

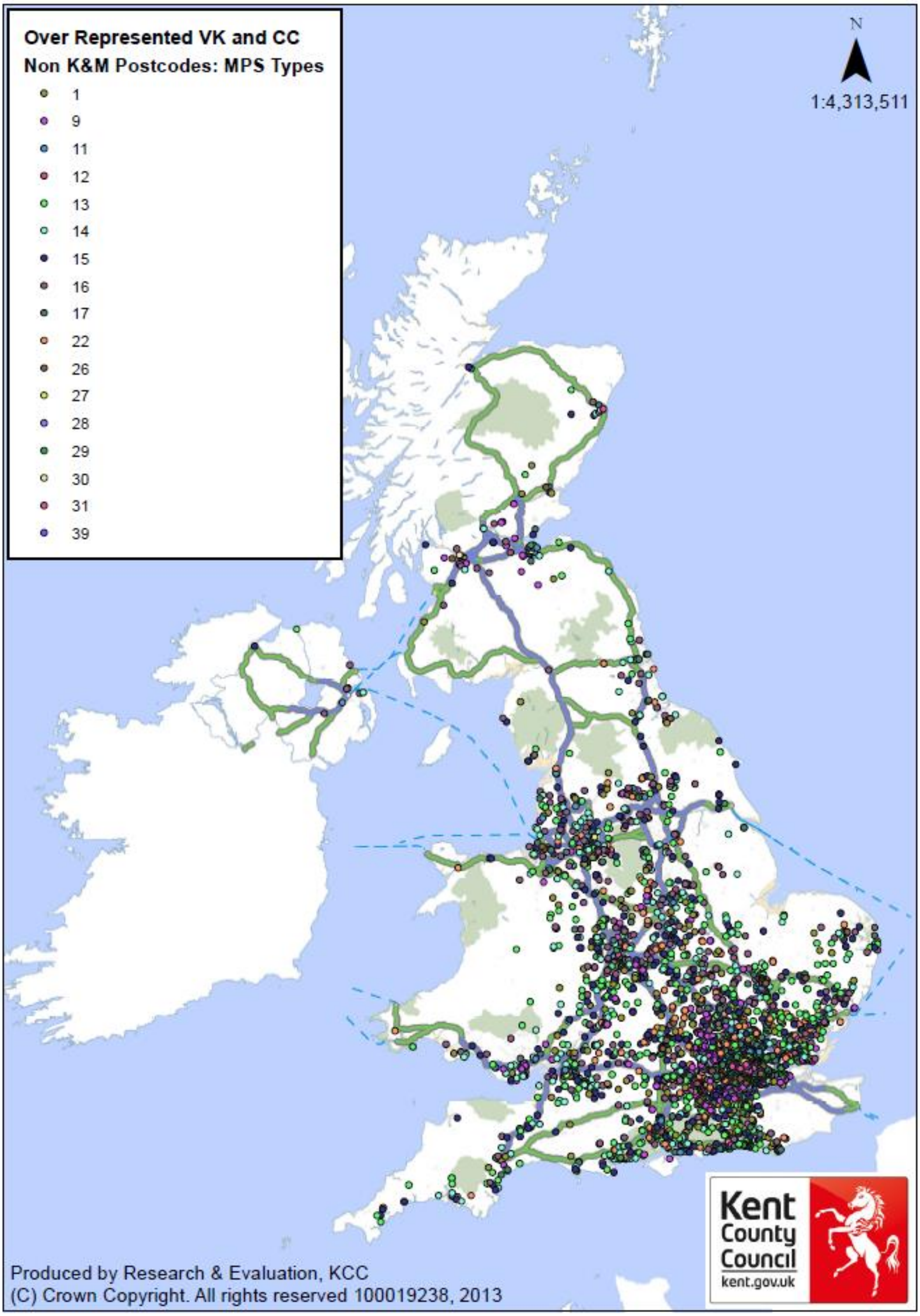
It must be noted that all Kent and Medway postcodes have been removed from both the Canterbury visitor database as well as the national level database to enable comparison between the two.

Appendix 3 – Mosaic Mapping

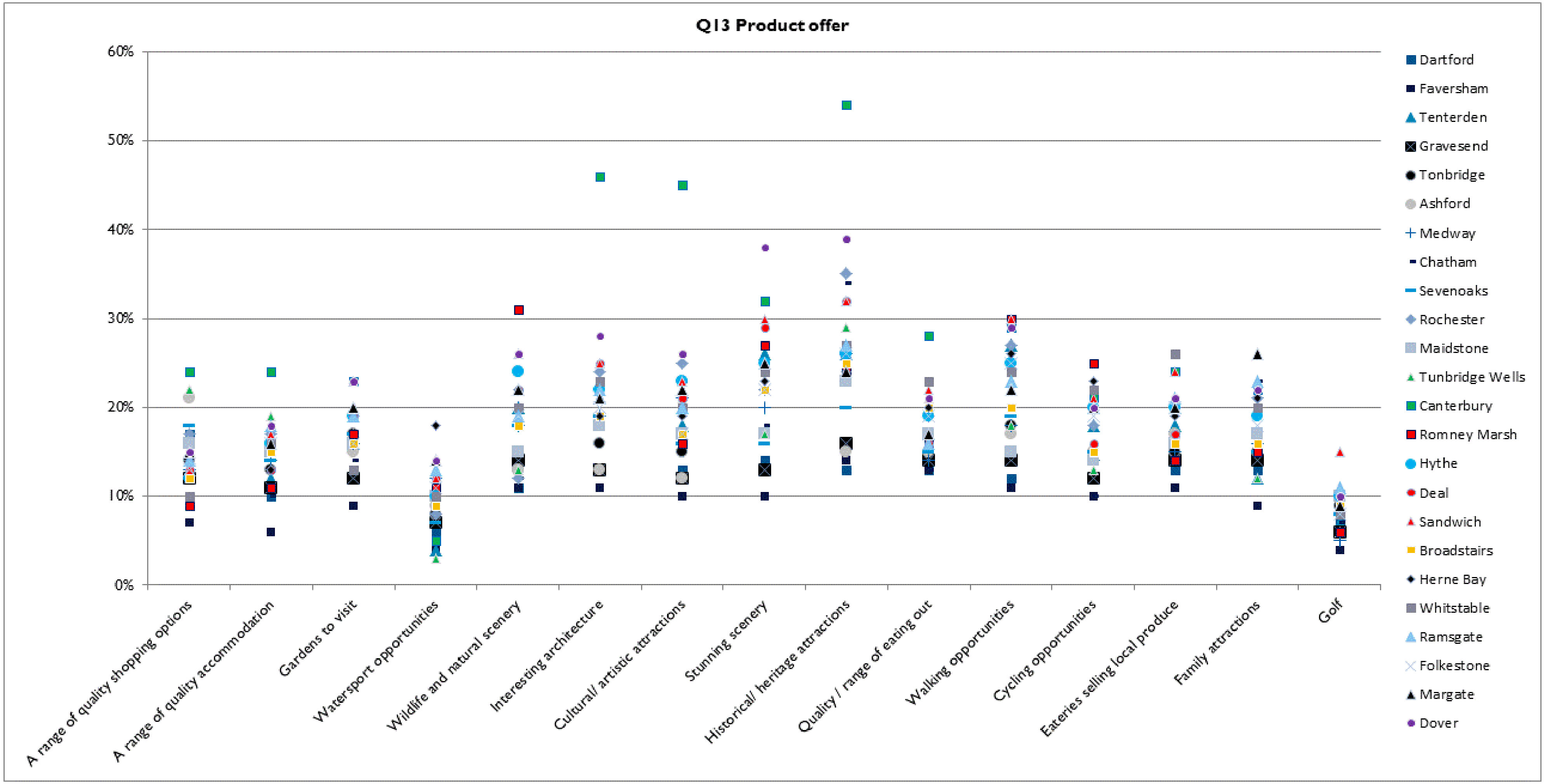
Geographic mapping of postcodes from the Visit Canterbury and Canterbury Cathedral databases.



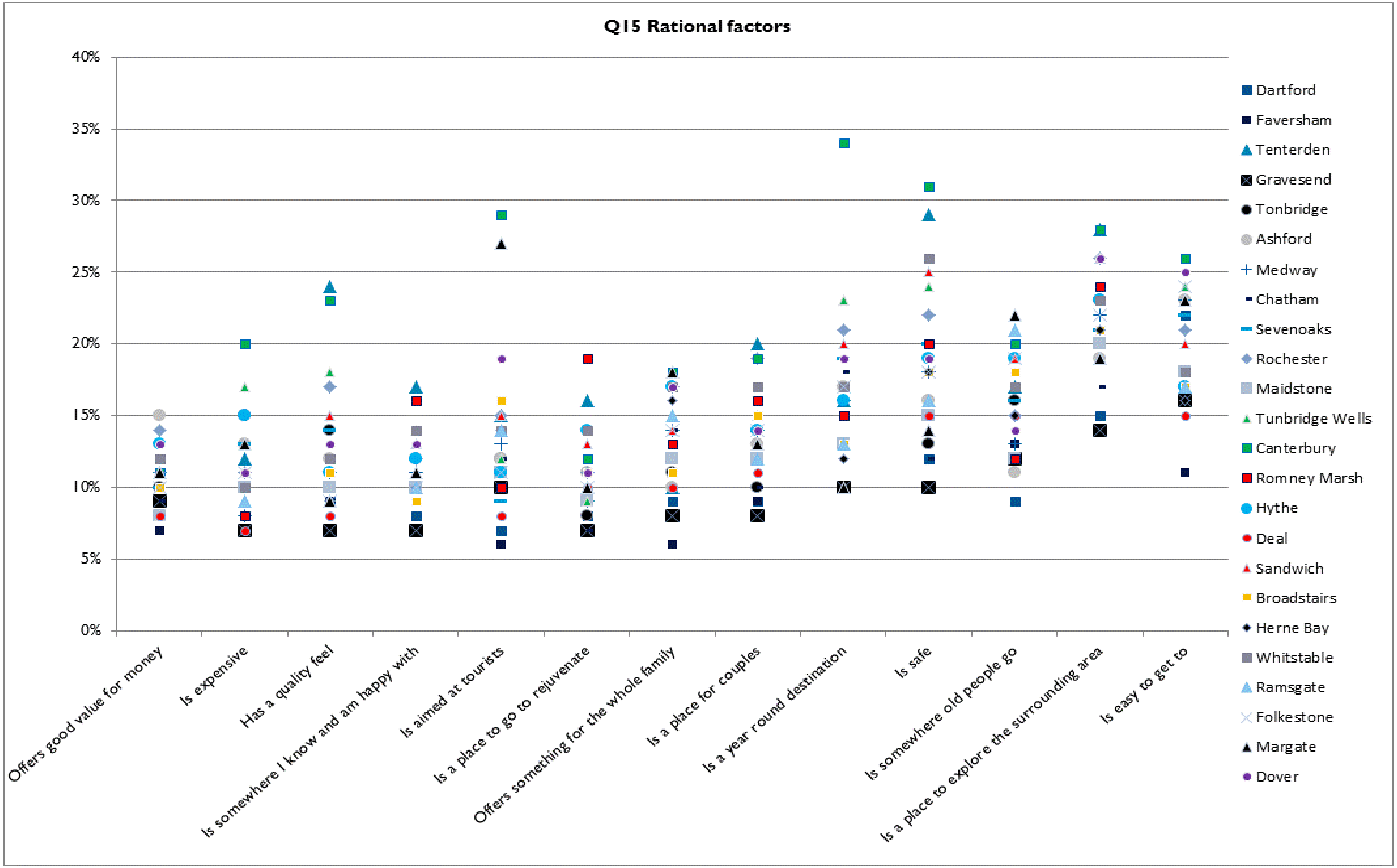
Geographic mapping of the postcodes which over-indexed more than 1.5 times the national average from the Visit Canterbury and Canterbury Cathedral databases.



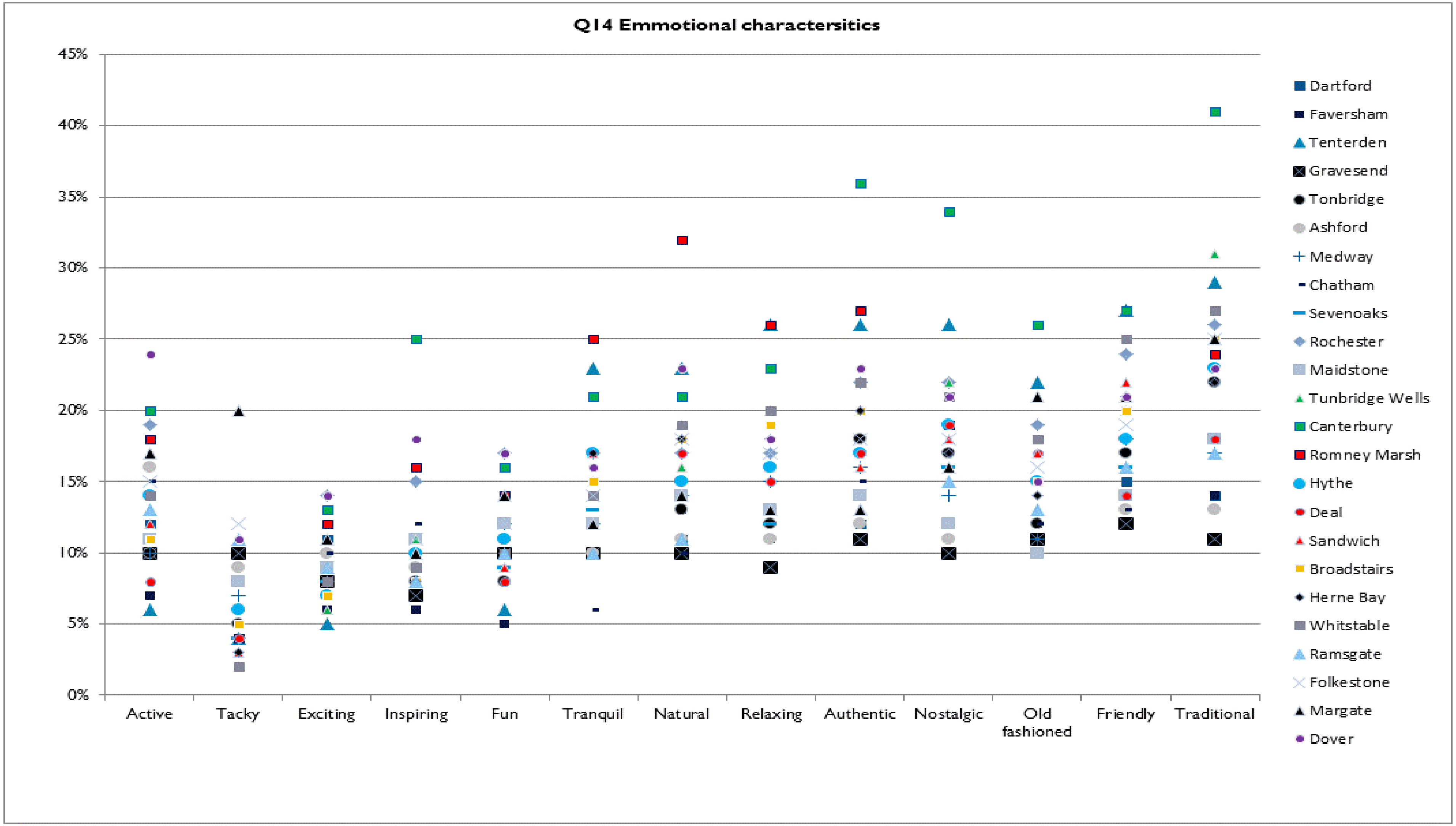
Appendix 4 – Perceptions of Kent destinations



Source: *Visit Kent Perception Research 2012*



Source: *Visit Kent Perception Research 2012*



Source: *Visit Kent Perception Research 2012*

Appendix 5

Canterbury City Council is a key provider of public services locally, so we would like your views on some of the services we provide. **How satisfied are you with each of the following services**?

	Very satisfied	Fairly satisfied	Neither satisfied nor dissatisfied	Fairly dissatisfied	Very dissatisfied	Never used
Benefits services (for example, Housing)	113	270	411	56	51	798
	6.7%	15.9%	24.2%	3.3%	3.0%	47.0%
Council Tax collections	210	613	545	90	53	181
	12.4%	36.2%	32.2%	5.3%	3.1%	10.7%
Children and young people services	45	336	499	123	48	622
	2.7%	20.1%	29.8%	7.4%	2.9%	37.2%
Council housing services	60	133	470	82	64	873
	3.6%	7.9%	27.9%	4.9%	3.8%	51.9%
Housing advice and homelessness	32	137	491	81	74	877
	1.9%	8.1%	29.0%	4.8%	4.4%	51.8%
Planning services	50	329	532	106	79	579
	3.0%	19.6%	31.8%	6.3%	4.7%	34.6%
Recycling collection	372	798	188	219	156	4
	21.4%	45.9%	10.8%	12.6%	9.0%	0.2%
Bin collection	412	763	174	219	168	2
	23.7%	43.9%	10.0%	12.6%	9.7%	0.1%
Keeping the area clean (beaches, town centres etc.)	197	1,007	243	181	76	12
	11.5%	58.7%	14.2%	10.5%	4.4%	0.7%
Parks and open spaces (including beaches / foreshore)	202	1,000	310	121	46	33
	11.8%	58.4%	18.1%	7.1%	2.7%	1.9%
Events and festivals	228	809	452	68	58	102
	13.3%	47.1%	26.3%	4.0%	3.4%	5.9%

Museums/galleries	239	829	314	83	19	215
	14.1%	48.8%	18.5%	4.9%	1.1%	12.7%
Support for the Voluntary and Community Sector	53	400	567	94	25	537
	3.2%	23.9%	33.8%	5.6%	1.5%	32.0%
Support for local businesses	42	301	573	146	84	516
	2.5%	18.1%	34.5%	8.8%	5.1%	31.0%
Enforcement activity (eg licensing, food safety, noise, parking)	53	470	530	266	114	232
	3.2%	28.2%	31.8%	16.0%	6.8%	13.9%
Park and Ride	298	583	312	52	28	414
	17.7%	34.6%	18.5%	3.1%	1.7%	24.5%
Public toilets	64	500	392	317	196	233
	3.8%	29.4%	23.0%	18.6%	11.5%	13.7%
Sport/leisure facilities	122	716	431	151	55	207
	7.3%	42.6%	25.6%	9.0%	3.3%	12.3%
Theatres/halls	248	766	398	89	32	156
	14.7%	45.4%	23.6%	5.3%	1.9%	9.2%
Visitor Information Centre	155	455	415	113	83	460
	9.2%	27.1%	24.7%	6.7%	4.9%	27.4%
Other	12	8	35	14	36	120
	5.3%	3.6%	15.6%	6.2%	16.0%	53.3%

Source: *Canterbury City Council 2012 Residents Survey*

Appendix 6

Please tell us **how often** you use the following services:

Sports and Leisure facilities

	Almost every day	At least once a week	About once a month	Within the last six months	Within the last year	Longer ago	Never used	Does not apply / don't know
Herne Bay Sports Arena (at Herne Bay High School)	1	40	18	41	46	61	1289	207
	0.1%	2.3%	1.1%	2.4%	2.7%	3.6%	75.7%	12.2%
Herons Leisure Centre	27	97	28	84	107	189	972	191
	1.6%	5.7%	1.7%	5.0%	6.3%	11.2%	57.3%	11.3%
Kingsmead Leisure Centre	27	157	79	134	155	346	684	130
	1.6%	9.2%	4.6%	7.8%	9.1%	20.2%	40.0%	7.6%
Whitstable Leisure Pool	8	41	47	103	120	226	977	191
	0.5%	2.4%	2.7%	6.0%	7.0%	13.2%	57.0%	11.2%
Whitstable Sports Centre (at Whitstable Community College)	9	20	14	29	36	109	1256	232
	0.5%	1.2%	0.8%	1.7%	2.1%	6.4%	73.7%	13.6%

Festivals and events

	Within the last year	Longer ago	Never attended	Does not apply / don't know
Canterbury Anifest	86	65	1287	255
	5.1%	3.8%	76.0%	15.1%
Canterbury Festival	462	301	844	116
	26.8%	17.5%	49.0%	6.7%

Canterbury Food and Drink Festival (Euro fair)	577	322	739	93
	33.3%	18.6%	42.7%	5.4%
Herne Bay Festival	354	273	960	136
	20.5%	15.8%	55.7%	7.9%
Sounds New	23	40	1225	358
	1.4%	2.4%	74.4%	21.7%
Whitstable Biennale	155	90	1123	289
	9.4%	5.4%	67.8%	17.4%
Whitstable Oyster Festival	548	334	678	123
	32.6%	19.8%	40.3%	7.3%

Museums and galleries

	Almost every day	At least once a week	About once a month	Within the last six months	Within the last year	Longer ago	Never used	Does not apply / don't know
Beaney Art Musuem	1	65	247	0	0	416	786	113
	0.1%	4.0%	15.2%	0.0%	0.0%	25.6%	48.3%	6.9%
Canterbury Heritage Museum	0	6	67	102	111	427	894	78
	0.0%	0.4%	4.0%	6.1%	6.6%	25.3%	53.1%	4.6%
Herne Bay Museum	0	1	19	87	102	292	1082	111
	0.0%	0.1%	1.1%	5.1%	6.0%	17.2%	63.9%	6.6%
Horsebridge Arts and Community Centre	2	21	95	131	149	158	1019	114
	0.1%	1.2%	5.6%	7.8%	8.8%	9.4%	60.3%	6.7%
Canterbury Roman Museum	1	1	10	101	141	517	837	88
	0.1%	0.1%	0.6%	6.0%	8.3%	30.5%	49.4%	5.2%

Westgate Towers Museum	0	0	7	100	121	354	1021	85
	0.0%	0.0%	0.4%	5.9%	7.2%	21.0%	60.5%	5.0%
Whitstable Museum	2	3	32	103	116	255	1074	112
	0.1%	0.2%	1.9%	6.1%	6.8%	15.0%	63.3%	6.6%

Theatres and Concert Halls

	Almost every day	At least once a week	About once a month	Within the last six months	Within the last year	Longer ago	Never used	Does not apply / don't know
Kings Hall	0	2	6	137	166	526	773	72
	0.0%	0.1%	0.4%	8.1%	9.9%	31.3%	46.0%	4.3%
Marlowe Theatre	1	3	90	501	299	441	333	32
	0.1%	0.2%	5.3%	29.5%	17.6%	25.9%	19.6%	1.9%

Source: *Canterbury City Council 2012 Residents Survey*

Appendix 7

If you have **never used (or experienced)** any of the following services please tell us why

Sports and Leisure facilities

	Too expensive	Not enough time	No interest	Location / access	Not aware	(for example private gym)	Other (please state reason below)
Herne Bay Sports Arena (at Herne Bay High School)	30	76	452	369	247	216	90
	2.1%	5.3%	31.6%	25.8%	17.2%	15.1%	6.3%
Herons Leisure Centre	49	96	355	340	170	185	83
	3.9%	7.7%	28.6%	27.4%	13.7%	14.9%	6.7%
Kingsmead Leisure Centre	82	126	321	136	74	177	98
	8.2%	12.5%	32.0%	13.5%	7.4%	17.6%	9.8%
Whitstable Leisure Pool	47	110	333	351	136	211	96
	3.8%	8.8%	26.7%	28.2%	10.9%	16.9%	7.7%
Whitstable Sports Centre (at Whitstable Community College)	31	71	422	362	227	230	93
	2.2%	5.1%	30.3%	25.9%	16.3%	16.5%	6.7%

Festivals and events

	Too expensive	Not enough time	No interest	Location / access	Not aware	Go to alternative (for example private gym)	Other (please state reason below)
Canterbury Anifest	24	77	426	43	827	30	36
	1.6%	5.3%	29.2%	3.0%	56.8%	2.1%	2.5%
Canterbury Festival	42	196	384	82	262	31	47
	4.0%	18.9%	37.0%	7.9%	25.2%	3.0%	4.5%

Canterbury Food and Drink Festival (Euro fair)	30	182	301	60	247	20	51
	3.4%	20.5%	33.9%	6.8%	27.8%	2.3%	5.7%
Herne Bay Festival	10	95	365	219	337	53	43
	0.9%	8.5%	32.6%	19.5%	30.1%	4.7%	3.8%
Sounds New	7	40	414	90	826	24	37
	0.5%	2.8%	28.8%	6.3%	57.4%	1.7%	2.6%
Whitstable Biennale	9	60	405	133	637	27	37
	0.7%	4.6%	31.1%	10.2%	48.8%	2.1%	2.8%
Whitstable Oyster Festival	21	164	310	142	201	27	44
	2.3%	18.1%	34.2%	15.7%	22.2%	3.0%	4.9%

Museums and galleries

	Too expensive	Not enough time	No interest	Location / access	Not aware	example private gym)	Other (please state reason below)
Beaney Art Musuem	15	186	360	53	349	23	54
	1.4%	17.9%	34.7%	5.1%	33.7%	2.2%	5.2%
Canterbury Heritage Museum	26	254	391	53	294	18	54
	2.4%	23.6%	36.3%	4.9%	27.3%	1.7%	5.0%
Herne Bay Museum	13	150	387	198	372	31	55
	1.1%	12.6%	32.5%	16.6%	31.2%	2.6%	4.6%
Horsebridge Arts and Community Centre	5	122	408	116	398	35	39
	0.5%	11.0%	36.8%	10.5%	35.9%	3.2%	3.5%
Canterbury Roman Museum	32	238	374	41	273	33	60
	3.1%	22.9%	36.0%	3.9%	26.3%	3.2%	5.8%

Westgate Towers Museum	25	275	380	65	273	29	80
	2.2%	24.5%	33.8%	5.8%	24.3%	2.6%	7.1%
Whitstable Museum	21	141	378	175	387	33	46
	1.8%	12.0%	32.1%	14.9%	32.9%	2.8%	3.9%

Theatres and Concert Halls

	Too expensive	Not enough time	No interest	Location / access	Not aware	example private gym)	Other (please state reason below)
Kings Hall	64	156	268	118	325	89	58
	6.0%	14.7%	25.3%	11.1%	30.7%	8.4%	5.5%
Marlowe Theatre	236	180	161	49	20	28	77
	31.9%	24.4%	21.8%	6.6%	2.7%	3.8%	10.4%

Source: *Canterbury City Council 2012 Residents Survey*