

Insight

Coventry City Centre Christmas Survey 2015 & Christmas Footfall

Insight Team

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Coventry City Council



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Contents

1.	Executive Summary	2
2.	Introduction	3
3.	Research Aim and Objectives	3
4.	Survey methodology	3
5.	Performance	4
5.1.	<i>City Centre Footfall</i>	4
5.2.	<i>Void Units</i>	5
6.	Survey Results	6
6.1.	<i>Shopping on day of survey (street sample only)</i>	6
6.2.	<i>Christmas advertising campaign</i>	7
6.3.	<i>Other Christmas marketing</i>	9
6.4.	<i>Campaign impact</i>	10
6.5.	<i>Festive offers and attractions</i>	10
7.	Respondent Demographics.....	14

1. Executive Summary

Footfall figures over the Christmas period were slightly higher overall than the same period last year. Coventry's footfall performance compared to the previous year was better than the UK average throughout the whole period. However, week 48, the week of 'Black Friday' and the Christmas Light Switch-on had slightly lower footfall levels this year compared to last year. Also, overall footfall during the period is lower than in 2012 and 2013 – as it has been generally throughout 2015.

The 2015 survey of city centre Christmas shoppers revealed that:

- When interviewed on-street, 62% of respondents were in the city centre to do gift shopping.
- Average spend per respondent who was shopping was £68.54, up on last year's figure (£63.60) and the year before (£61.42).
- 38% of respondents said that Coventry City Centre was their main centre for Christmas shopping. This was followed by 22% who mainly shopped online and 11% who mainly used Birmingham. This is broadly similar to the responses from the 2014 survey, with a slight increase in internet shopping (2014 17%).
- 20% of respondents said they had seen or heard any advertisements or slogans regarding Christmas in Coventry City Centre, this remained at 20% when respondents were visually prompted with this year's advertising. This is the least recalled campaign since the survey began in 2004.
- 13% of respondents had visited the www.coventrycitycentre.co.uk website for information on what's going on in Coventry this Christmas. Of those that had visited the site 64% rated it as either good or excellent.
- 13% of respondents had seen the city centre Christmas guide, of whom 60% had read it. 45% (19 out of 42) of those that had read the guide rated it as useful or very useful.
- 12% of respondents said that the Christmas advertising campaign or guide had encouraged them to come into the city centre to do their Christmas shopping. Of those that hadn't been encouraged, 44% hadn't seen any advertising, 28% would be shopping in the city centre regardless of any advertising and 19% preferred to shop elsewhere.
- 37% had seen Christmas advertising for other towns, cities or shopping centres.
- 17% of respondents had or intended to use the free parking offer.
- Just under half (47%) were aware of the festive events or attractions taking place in Coventry City Centre this Christmas. The Christmas Market and Christmas Lights Switch-On were the most popular events, with 35% and 17% of respondents having attended these events respectively.
- 43% of respondents rated the festive events programme as good or excellent, fewer than last year's survey (53%). The average rating given by respondents to the events programme was one of the lowest in 12 years.
- Just under two thirds of respondents (61%) rated this year's Christmas decorations as good or excellent, similar to last year's results (63%).

2. Introduction

This report presents a review of the 2015 Christmas period in Coventry City Centre, analysing the results of the city centre Christmas Survey 2015 and examining performance indicator data from the Christmas period.

The city centre Christmas survey is carried out annually on behalf of Coventry's Business Improvement District (BID). Findings are used to gauge public awareness and perceptions of the annual city centre Christmas marketing campaign, to assess the popularity of seasonal city centre events and promotions and to examine shopper behaviour.

3. Research Aim and Objectives

The overall aim of this on-going review is to present latest Christmas survey findings alongside city centre performance measures during the Christmas period.

Objectives of the review are as follows:

1. To analyse city centre footfall and prime retail void units during the busiest retail period of the year.
2. To investigate awareness and impact of various Christmas marketing activities such as advertising, special offers and Christmas initiatives and events.
3. To measure awareness of Coventry City Centre Christmas attractions and events and levels of attendance at these.
4. To examine public perceptions of 2015 festive promotions.

4. Survey methodology

The Christmas survey was conducted face-to-face with shoppers in Coventry City Centre and also hosted online during the run up to Christmas 2015. Examples of the 2015 Christmas campaign visual branding and Christmas shopping guide cover were used as prompts where necessary.

Fieldwork for the street survey is carried out by a market research company commissioned by the council. Researchers are based around the main city centre shopping areas (Upper and Lower Precinct, Broadgate and West Orchards shopping centre) and randomly select shoppers passing by to ask them to participate in the survey.

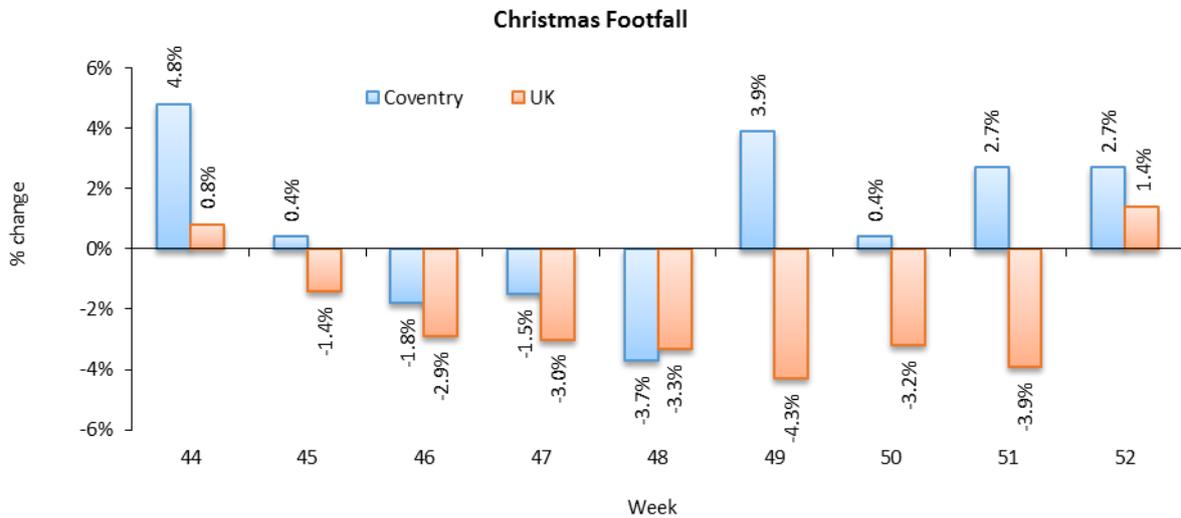
The link to the online survey was advertised online and to members of the Insight Team contact database via email.

In total, there were 549 respondents to the Christmas survey 2015, 313 respondents were interviewed on street and 246 responses were submitted online.

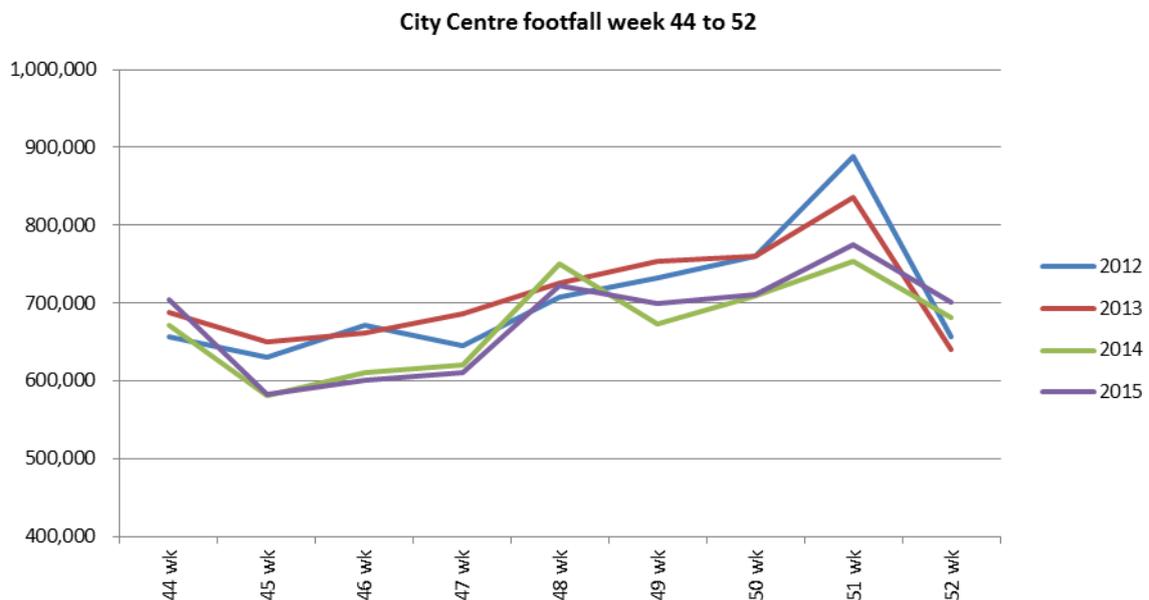
5. Performance

5.1. City Centre Footfall

Coventry city centre footfall was up six weeks of nine over the Christmas period. With the exception of week 48, footfall in the city centre performed better than national figures.

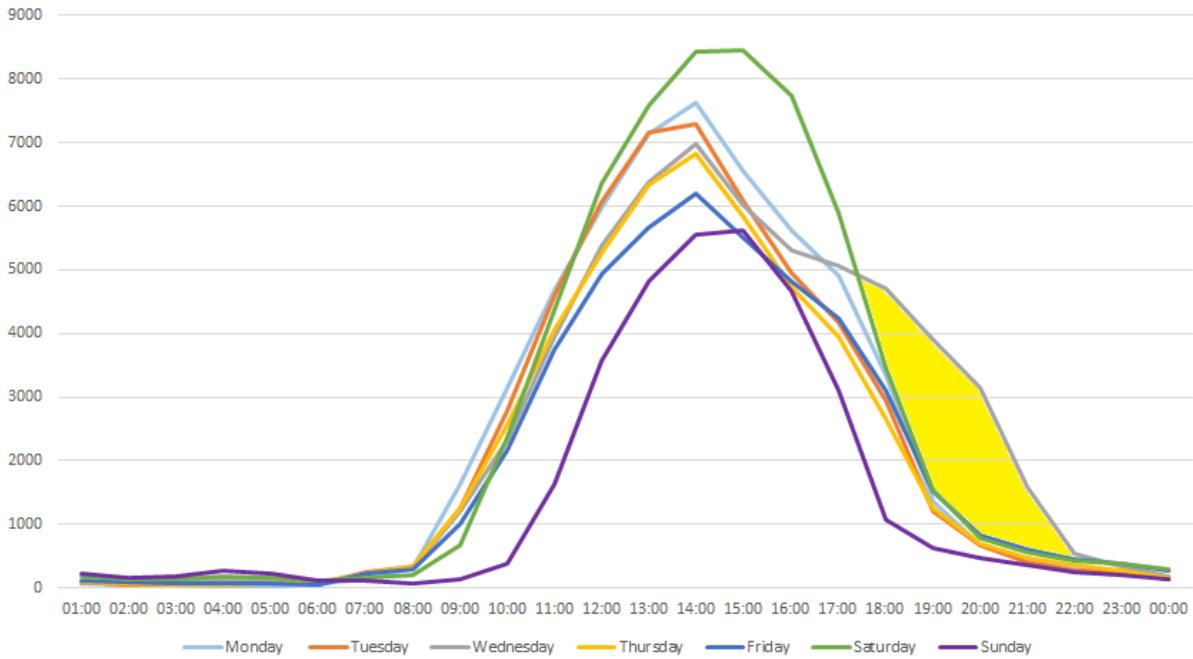


Despite city centre footfall being up for 2015 from week 49 against 2014, footfall levels in the city centre are lower than previous years, with the week before Christmas peak (the busiest week of the year) being less pronounced. The impact of the Christmas Light Switch-on and the introduction of 'Black Friday' have resulted in footfall during week 48 being the second highest of the year.



Wednesday evenings in the city centre during the Christmas period, with late night shopping and free car parking, are seen to be a key stimulant to footfall. The area highlighted in yellow on the following chart illustrates where Wednesday counts exceed the maximum footfall recorded on other days of the week during weeks 47 to 51. Footfall is 144% higher after 5pm on a Wednesday night compared to footfall during other days.

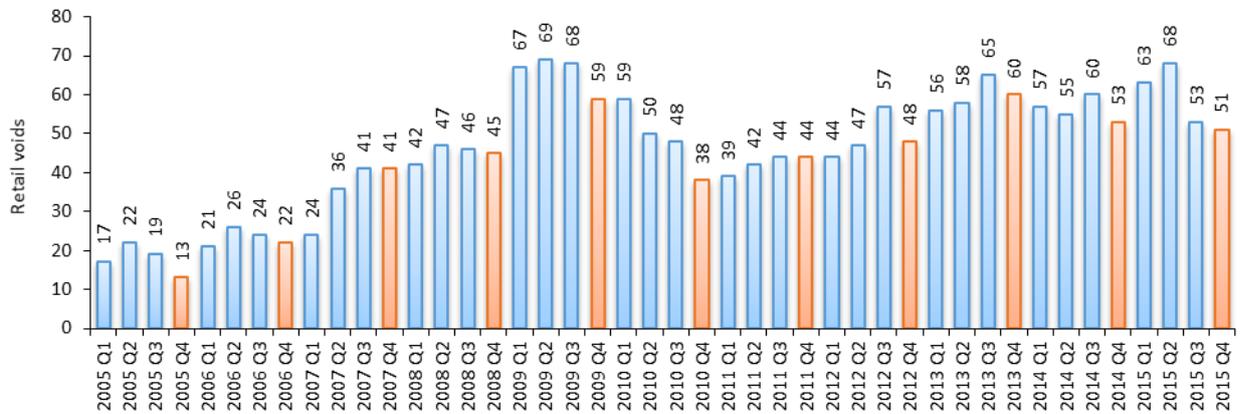
Average hourly footfall by day of the week, weeks 47 to 51 2015



5.2. Void Units

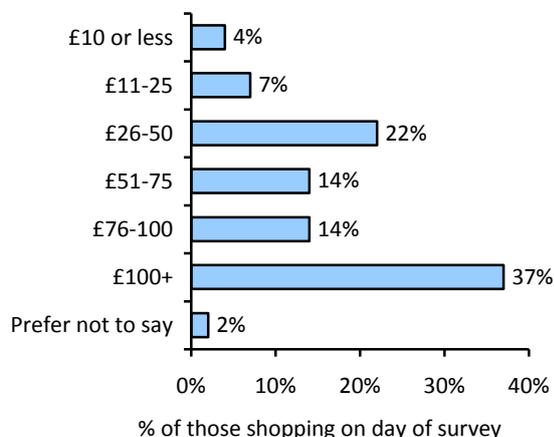
There were 51 empty retail units in the city centre at the end of quarter 4 2015, 2 fewer than the previous quarter and also 2 fewer empty units than a year ago.

City Centre Retail Voids

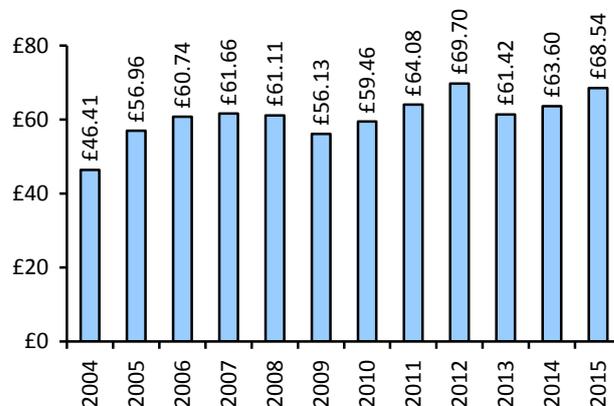


Analysis of respondents' anticipated spend showed that over a third of shoppers estimated that they would spend over £100 during their visit to the city centre on the day they were surveyed, the vast majority anticipated spending over £25. The average spend per head per visit was £68.54, up on last year's figure (£63.60), the 2nd highest average spend in the 12 year history of this survey.

Intended spend in Coventry City Centre

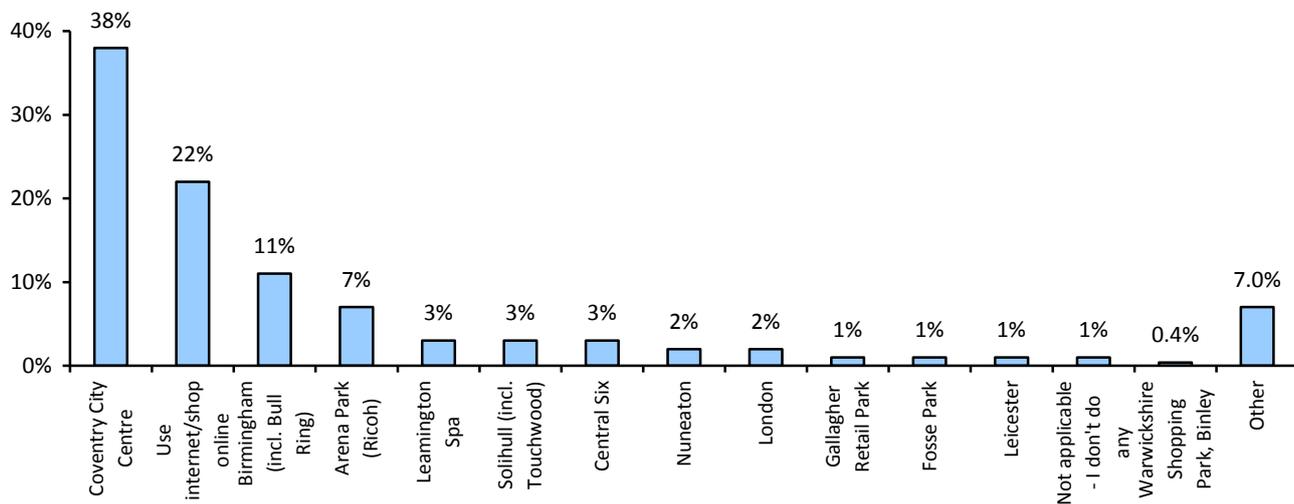


Mean estimated spend per trip: trend analysis



All respondents were asked about their preferred destination for Christmas shopping. The most popular preferred Christmas shopping destination amongst those surveyed (overall amongst those surveyed in the city centre and online responses) was Coventry City Centre. 38% of respondents said Coventry City Centre was their main centre, similar to last year's survey (40%). Clearly the next most popular was online shopping which is on an increasing trend, up from 12% in 2013 and 17% in 2014 to 22% this year. Other popular centres used were Birmingham (11%) and Arena Park (7%).

Main centre chosen for Christmas shopping



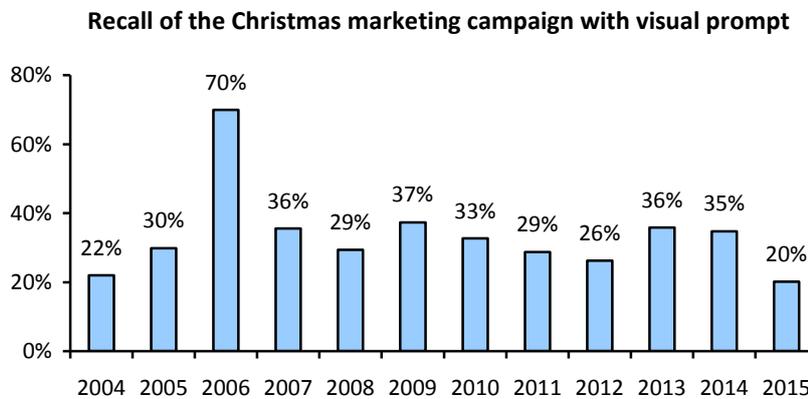
6.2. Christmas advertising campaign

Without a prompt, 1 in 5 (20%) respondents said that they had seen/heard any advertisements or slogans regarding Christmas in Coventry City Centre. Respondents were asked which advertisements or slogans they recalled seeing, there were 179 responses from 91 respondents, some gave more than 1 answer. The majority of responses referred to general promotion of a particular event or attraction in Coventry (66 responses), a medium of marketing or a location where they recall seeing marketing (51 responses) or referred to adverts for particular shops (33 responses). Only a small proportion of responses, 13 in total, recalled specific campaigns or

slogans for Coventry. The word cloud below represents the most commonly used words used in the answers.

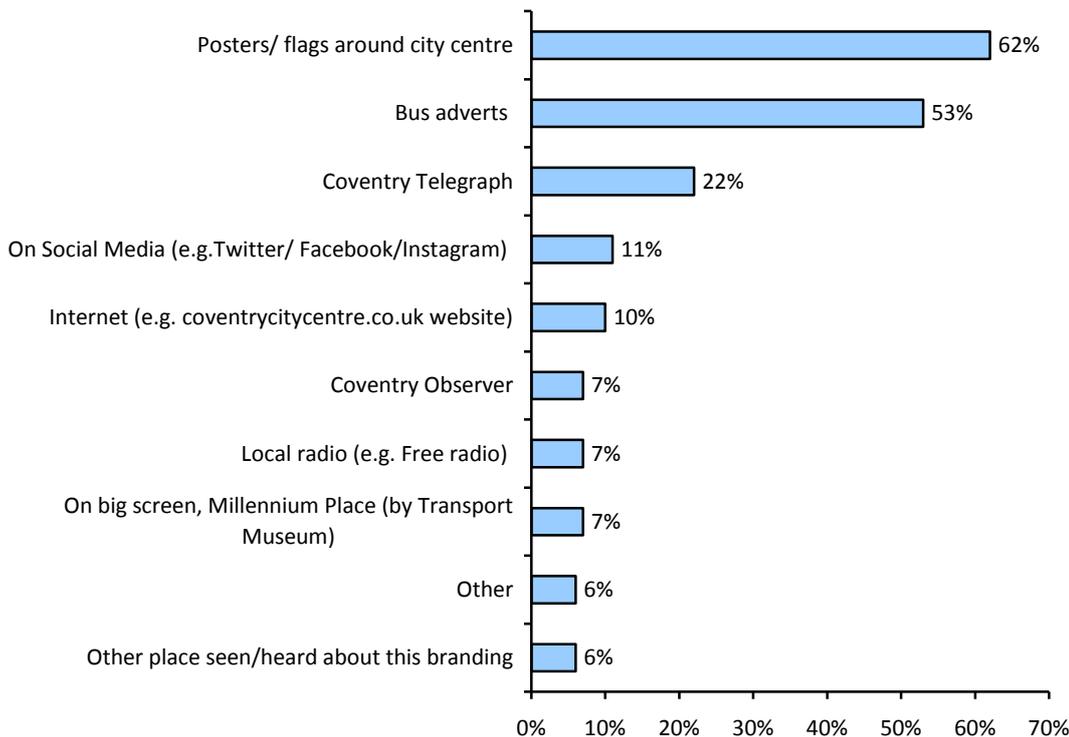


When given a visual prompt of the “Discover Christmas in Coventry” promotion the number of people who recalled the 2015 advertising campaign did not change notably. 20% of respondents recalling the campaign after a prompt is the lowest rate of recall in the 12 year history of this survey, this is a notable fall from the levels in the last 2 years.



Using prompts, respondents were asked where they recalled seeing the 2015 advertising campaign. Nearly two thirds of those who had indicated awareness of the campaign said they had seen branded posters or flags (62%) and just over half had seen the campaign on bus adverts (53%).

Specify where seen/heard the campaign

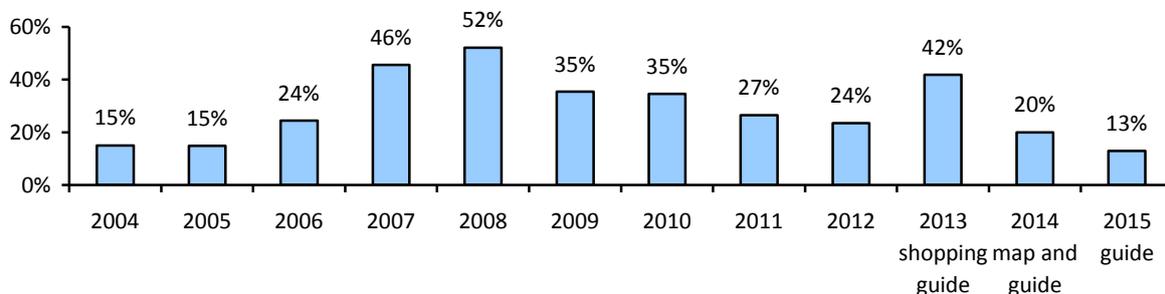


6.3. Other Christmas marketing

13% of respondents said that they had visited the coventrycitycentre.co.uk website for information about Christmas in Coventry City Centre. Of these, 64% thought that the website was either 'excellent' or 'good' (and only 5% of users answered 'poor' or 'very poor').

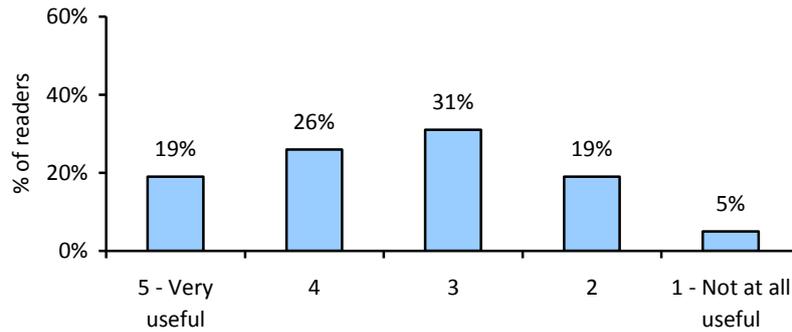
13% of respondents said that they had seen the city centre Christmas guide (an image of the cover was provided as a visual prompt). Of the people who had seen it, over half (60%) said that they had read it. The proportion of the sample aware of the guide was lower than the awareness of last year's map and guide.

Seen latest Christmas shopping magazine



People who had read the 'Discover' guide were asked to rate its usefulness (5 being very useful, 1 being not at all useful). 45% rated the magazine 4 or 5 i.e. useful or very useful.

How useful did you find the guide?

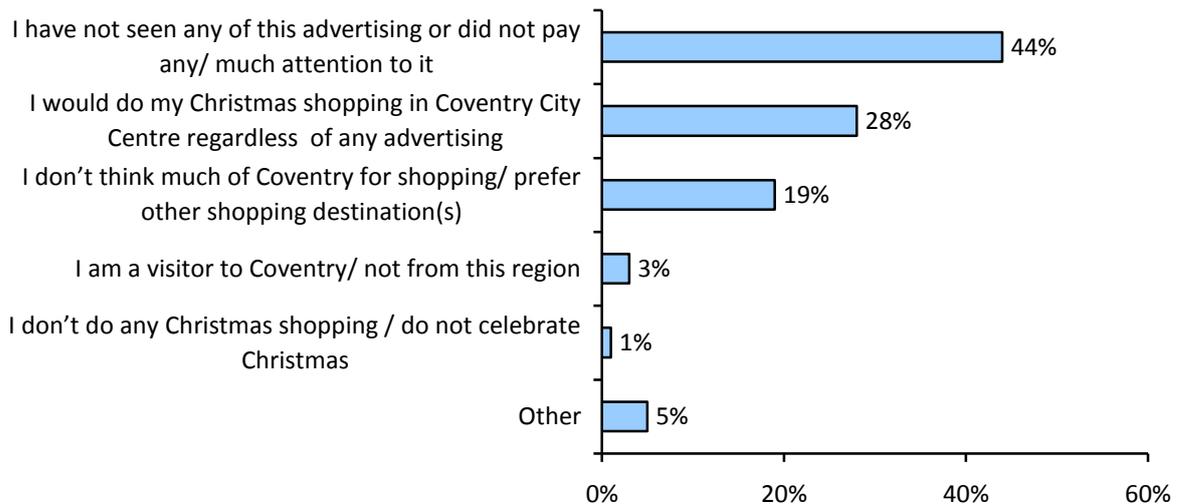


6.4. Campaign impact

12% of respondents said that this year's Christmas advertising campaign and/or the 'Discover' shopping guide had encouraged them to visit Coventry city centre for Christmas shopping. This was a little lower than the 2014 campaign (15%), and notably lower than the 2013 campaign (29%).

The main reasons for not having been encouraged into the city centre by the advertising campaign were not seeing it (44%), doing their shopping in Coventry City Centre regardless of any advertising (28%) and preferring to shop elsewhere (19%).

If not encouraged to visit by campaign/ guide, why not? (single response)



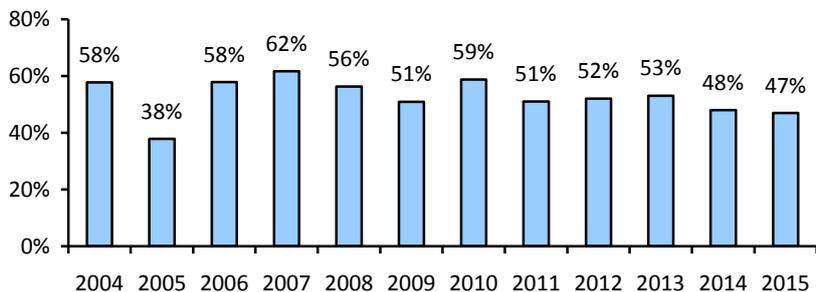
Just over a third of respondents (37%) said that they had seen or heard Christmas advertisements for other areas. By far the most widely recalled adverts for other areas were for Birmingham – most of these just stated 'Birmingham' and some specifically stated the 'Bull Ring' or the 'German Market'. Overall about as many people recalled Birmingham adverts as recalled adverts for Coventry City Centre.

6.5. Festive offers and attractions

17% of respondents said that they had already used or planned to take advantage of this year's free parking offer, similar to last year (15%) but notably lower than in 2013 (37%).

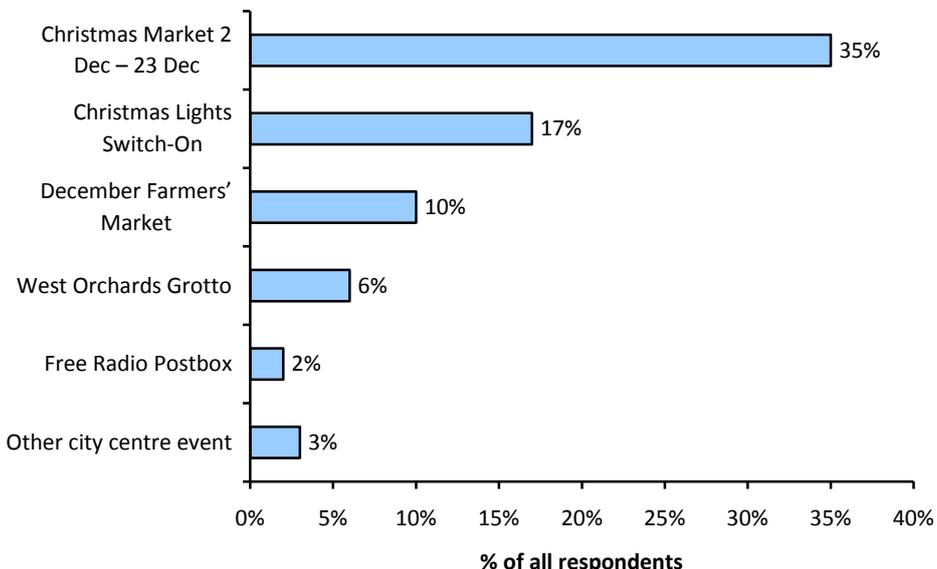
In total, 47% of respondents indicated that they were aware of festive events and attractions in the city centre this Christmas.

Aware of Christmas events/ attractions in Coventry City Centre



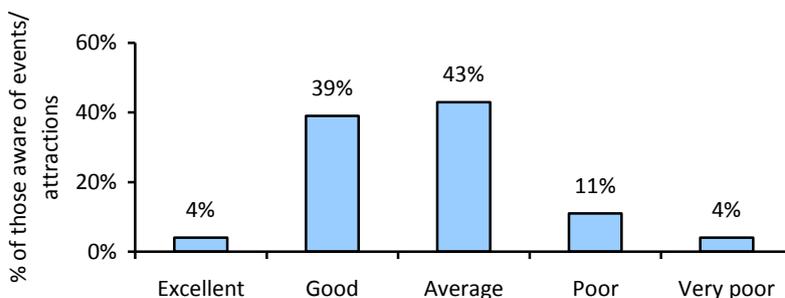
Significantly the most popular event or attraction was the Christmas Market, 35% of all respondents visited the Christmas Market. The next most popular, the Christmas Lights Switch-On, attracted 17% of all respondents.

Events visited

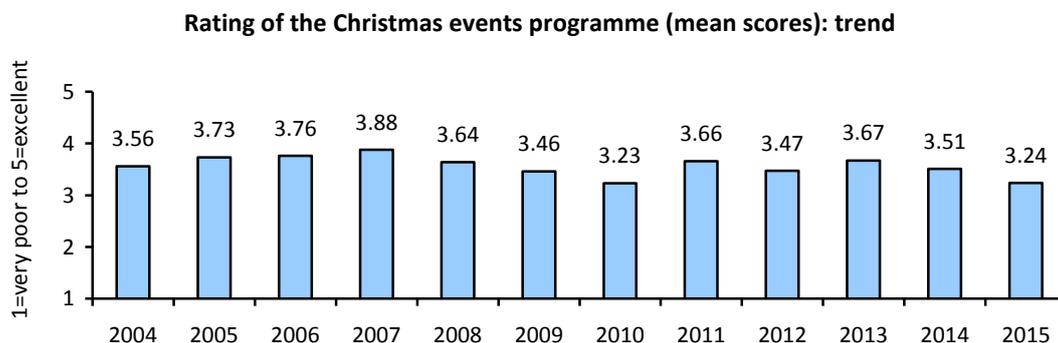


43% of those aware of 2015 festive events and attractions rated this year's programme offer as either 'good' or 'excellent', lower than last year's 53%.

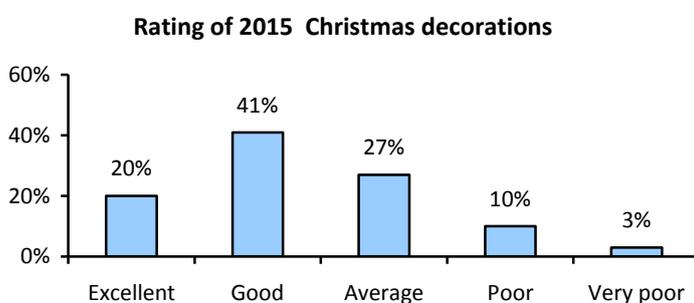
Rating of the Christmas events offer



Average levels of satisfaction with the overall Christmas events programme was 3.24 (out of 5), lower than recent years, one of the lowest average ratings in the history of the survey. The fall in the average rating is a result of fewer rating the programme as 'good' or 'excellent' and more rating it as 'poor' or 'very poor'.



Nearly two thirds of the sample (61%) rated the 2015 Christmas decorations and lights display within the city centre as either excellent or good.



Respondents were given the opportunity at the end of the survey to make further comments or suggestions, they were asked 'Do you have any comments regarding Coventry's festive attractions & events (or suggestions for the future)?'

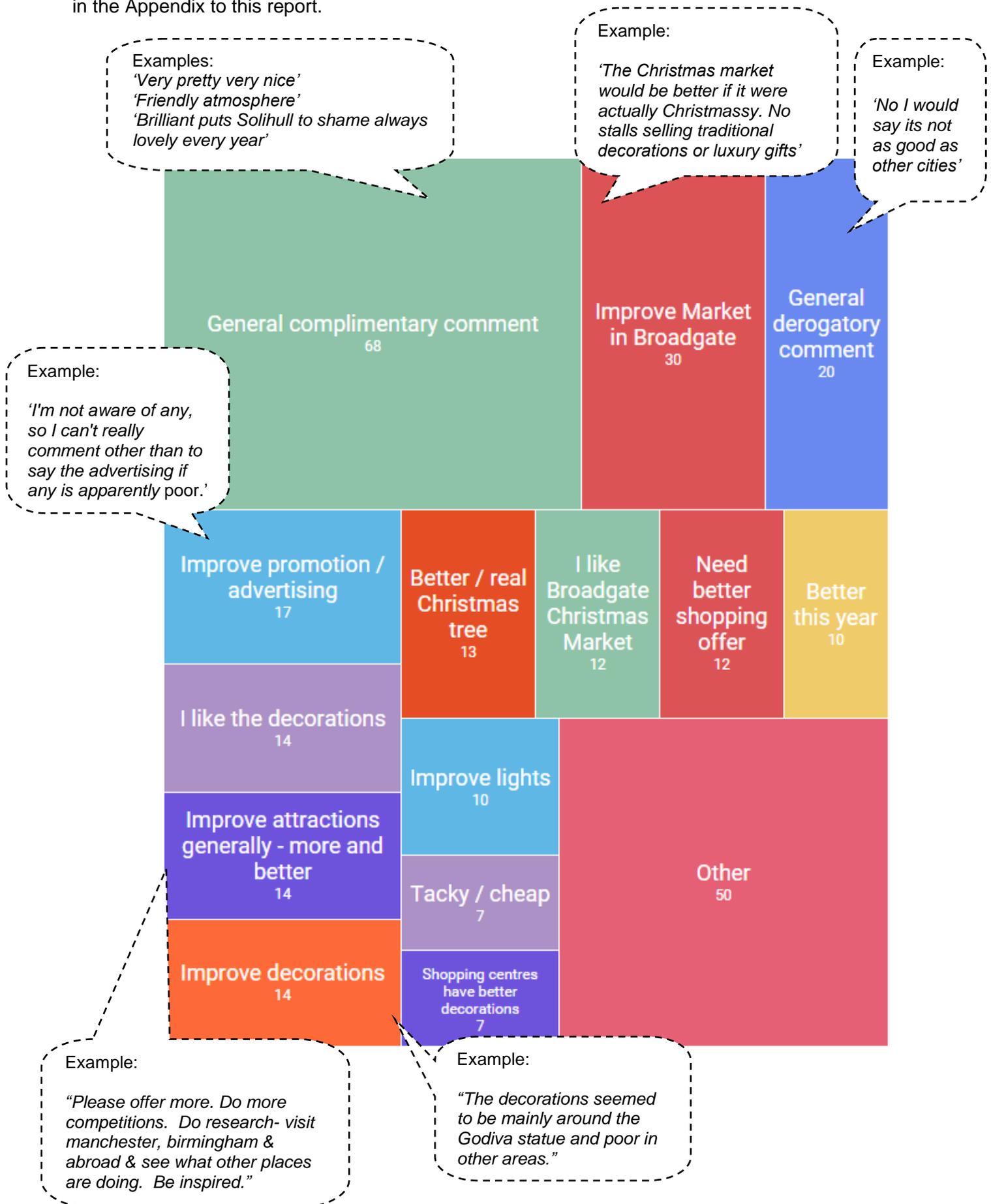
To get a broad feel for the tone of the comments made, each comment was categorised as either 'Positive', 'Negative', 'Suggestion' or 'Other'. 38% of respondents who made a comment made a comment that could be categorised generally as 'Positive' compared to 18% that were 'Negative'. 43% of comments were 'Suggestions' and 15% categorised as 'Other'.

To get a deeper understanding of the things respondents said, a further categorisation process was undertaken where themes of what respondents were commonly saying were created and the comments were allocated to these themes. The results of this process are presented in the following graphic with some example quotes included and presented fully in the Appendix to this report.

'General compliments' is notably the most common theme amongst comments; 68 responses were categorised as this, a quarter (25%) of all respondents who offered any comment gave a general compliment toward the city centre at Christmas. This is compared to only 20 who made a 'General derogatory comment' (7% of all offering a comment) – this reflects the balance between 'Positive' and 'Negative' comments discussed above.

The 2nd most common theme coming out of the comments is 'Improve the market in Broadgate', 30 comments included this general sentiment (11% of all offering a comment) – popular sub themes of this are 'make it more Christmassy / festive' (12 comments) and 'improve the quality / range of products' (8 comments). Compared to 30 respondents who made negative comments about / suggestions for improving the market in Broadgate, 12 respondents gave positive feedback specifically about the market.

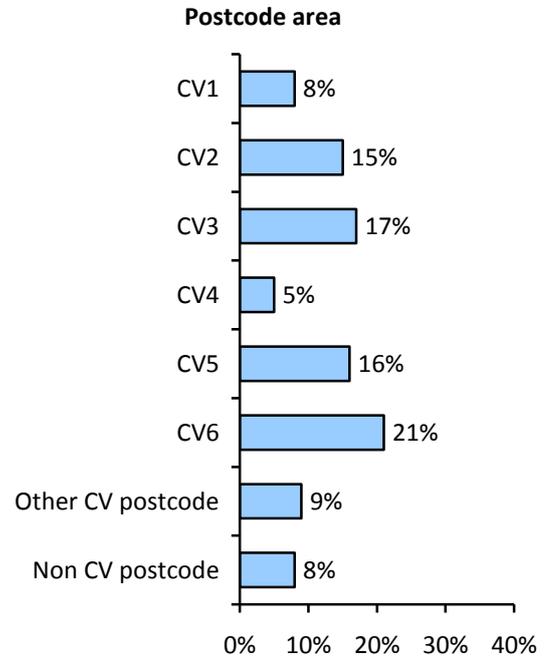
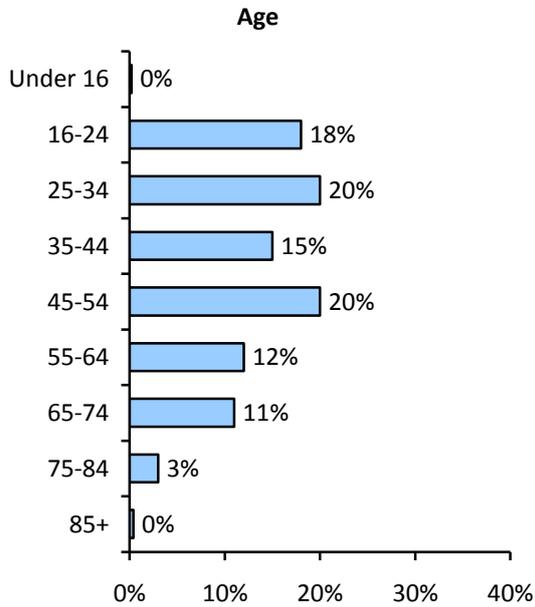
Other notable themes include 'Improve promotion / advertising' of events or attractions (17 comments) and the balance between 'I like the decorations' (14 comments) and 'Improve the decorations' (14 comments split between those who wanted more decorations and those who wanted better quality decorations). All of the responses and the categorisation of them can be read in the Appendix to this report.



7. Respondent Demographics

The sample was 52% female, 48% male and, asked for their ethnic group, three-quarters of respondents answered White British (74%). 53% of respondents were aged under 45. 10% of the sample considered themselves to have a disability.

83% of the sample lived in the CV1 to CV6 postcode area (Coventry postcodes), 9% were from other CV postcode areas (predominantly Warwickshire postcodes) and 8% outside Coventry and Warwickshire.



Insight

If you need any further information please contact us:

Telephone: (024) 7683 4372

Email: insight@coventry.gov.uk

