

TOURISM  
SOUTH EAST

## Canterbury Visitor Survey 2012

### Final Report of

Submitted by Tourism South East for Canterbury City Council

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*TSE Research: Tourism, Leisure & Culture Research & Consultancy*



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# 1 Introduction

## 1.1 Background

1.1.1 This document presents the key findings from the Canterbury Visitor Survey. Results are presented in tables and graphs with a short commentary. The survey was commissioned by Canterbury City Council and undertaken by the Research Unit at Tourism South East.

1.1.2 The purpose of the survey was to gather information on the origin, profile and behaviour of visitors to Canterbury. The survey also sought to explore views on the strengths and weaknesses of the city as a visitor destination by measuring aspects of the visitor experience. With regard to the latter, it was essential that the research would identify elements driving visitor satisfaction and be able to channel this information in a way which could directly inform future tourism policies for the city.

## 1.2 Survey methodology

1.2.1 The survey involved face-to-face interviews with a random sample of visitors encountered in key tourist locations. Those visiting for non-leisure purposes, e.g. trips concerned with their normal work, study or household shopping were not included in the survey.

1.2.2 As satisfaction measurement rely on visitors having used or experienced a particular service or facility, interviews were conducted with visitors who were at least half way through their visit. Individual interviewing sessions were carried out from the hours of 11am to 6pm during July and August 2012. A copy of the questionnaire is attached in Appendix 1.

1.2.3 Interviews were spread across weekdays and weekends to ensure a representative sample of visitors were interviewed.

## 1.3 Achieved sample

1.3.1 In all, 1,386 people were approached for interview. Of these 448 (32%) were not eligible to complete the interview (most of these lived close to Canterbury) and 538 (39%) declined to be interviewed. In total 400 (29%) adult visitors were successfully interviewed.

Base	400	
The Buttermarket	104	26%
Outside the Cathedral gate	294	74%
Other	2	1%

## 2 Survey findings: Visitor profile

### 2.1 Visitor age

2.1.1 Visitors were spread across the age groups although older visitors were the most dominant group. Overall, 53% of all visitors were over the age of 45 years.

2.1.2 Only 19% of visiting parties contained children under the age of 15 years. Groups containing young adults – 16 years to 24 years were lower in numbers, accounting for only 11% of all visitors.

Total 0-15	19%
Total 16-24	11%
Total 25-34	9%
Total 35-44	9%
Total 45-54	16%
Total 55-64	22%
Total 65-74	13%
Total 75+	2%

### 2.2 Group size and composition

2.2.1 The average group size was 2.68 people, comprising of 2.34 adults and 0.34 children.

2.2.2 Approximately 81% of all visiting parties contained only adults. The highest proportion of adult only visiting groups was found among groups on an overnight trip.

Total adults	2.34
Total 0-15	0.34
Total people	2.68

	All visitors	Day visitor from home	Day visitor on holiday	Staying visitor
Base	400	92	218	90
1 adult	11%	13%	9%	16%
2 adults	51%	50%	47%	59%
3 or more adults	19%	18%	23%	13%
1 adult plus 1 or more child(ren)	1%	3%	1%	-
2 adults plus 1 or more child(ren)	11%	9%	12%	11%
3 or more adults plus 1 or more child(ren)	8%	7%	9%	2%

## 2.3 Visitor origin

### 2.3.1

Two thirds of visitors (67%) were British residents. Unsurprisingly, the highest proportion of these were residents of other towns in Kent (18%) or Greater London (12%). Twenty nine percent of overseas visitors came from countries outside Western Europe

Base:	268	
Kent	47	18%
Greater London	32	12%
Yorkshire (N, S, E, W)	21	8%
Essex	18	7%
Lancashire	15	6%
Hertfordshire	12	4%
Greater Manchester	8	3%
East Sussex	7	3%
West Midlands	7	3%
Somerset	6	2%
West Sussex	6	2%
Scotland	6	2%
Suffolk	5	2%
Cheshire	4	1%
Devon	4	1%
Hampshire	4	1%
Norfolk	4	1%
Nottinghamshire	4	1%
Surrey	4	1%
Tyne & Wear	4	1%
Wales	4	1%
Bedfordshire	3	1%
Berkshire	3	1%
Buckinghamshire	3	1%
Cambridgeshire	3	1%
Derbyshire	3	1%
Durham	3	1%
Oxfordshire	3	1%
Shropshire	3	1%
Wiltshire	3	1%
Cleveland	2	1%
Cornwall	2	1%
Dorset	2	1%
Gloucestershire	2	1%
Leicestershire	2	1%
Merseyside	2	1%
Northamptonshire	2	1%
Channel Islands	1	<1%
Cumbria	1	<1%
Staffordshire	1	<1%
Warwickshire	1	<1%
Northern Ireland	1	<1%

Base:	132	
Germany	30	23%
Australia	16	12%
Belgium	13	10%
Netherlands	13	10%
France	12	9%
United States	8	6%
Canada	6	5%
Spain	6	5%
New Zealand	5	4%
Malta	3	2%
Switzerland	3	2%
Austria	2	2%
Denmark	2	2%
Portugal	2	2%
Romania	2	2%
Italy	1	1%
Cyprus	1	1%
Norway	1	1%
Bulgaria	1	1%
Hungary	1	1%
China	1	1%
Japan	1	1%
Russia	1	1%
Croatia	1	1%

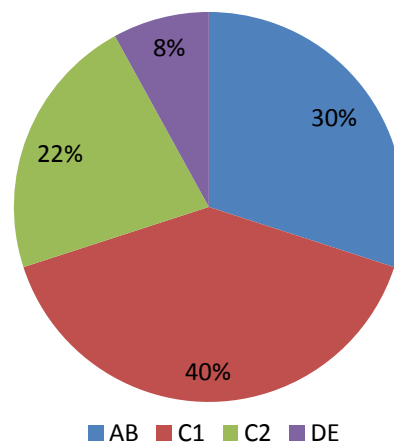
## 2.4 Employment & socio-economic status

2.4.1 Sixty-six per cent of visiting groups contained a chief income earner who was in employment at the time of the survey. Around a third of all visitors were retired.

Base	400
Employed full-time	64%
Employed part-time	2%
Self-employed	<1%
Retired	29%
Full-time student living at home	2%
Full-time student living away	1%
Unemployed	2%

2.4.2 Visitors came from predominately ABC1 households (70%).

**Figure 1: Socio-economic profile of visitors**



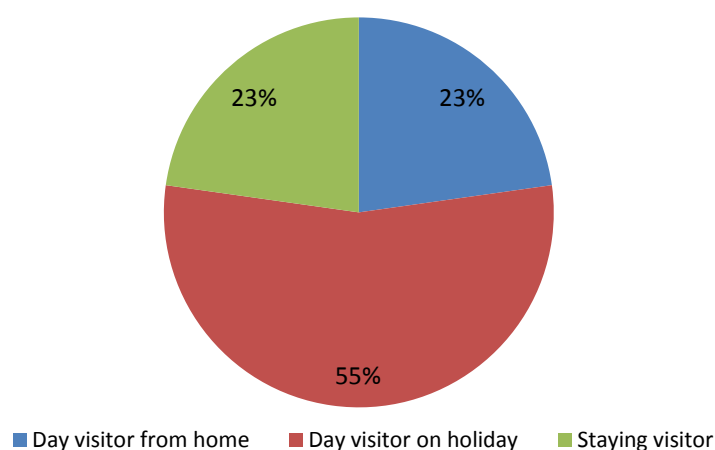
### 3 Survey findings: Trip features

#### 3.1 Trip type

3.1.1 Overall, 78% of all visitors were in Canterbury as part of a same-day visit. The majority of these visitors (55%) were 'day visitors on holiday' – overnight visitors staying in accommodation outside Canterbury and visiting the city as part of a day excursion. Twenty-three percent of all visitors were 'day visitors from home' – visitors who started their trip that day from their home residence and planned to return to their residence on the same day.

3.1.2 Nearly a quarter of all visitors were staying overnight in Canterbury for one or more nights.

Figure 2: Trip type



#### 3.2 Main purpose of visit

3.2.1 Nearly all visitors were visiting for leisure or holiday purposes (91%).

3.2.2 A significant number of overnight visitors (representing 12% of all overnight trips) were visiting Canterbury to see friends or relatives, whilst 11% of day visitors from home were on a special shopping trip.

	All visitors	Day visitor from home	Day visitor on holiday	Staying visitor
Base	400	92	218	90
Leisure/holiday	91%	86%	95%	83%
Visiting friends or relatives	6%	3%	4%	12%
Shopping trip (special/non-regular)	3%	11%	<1%	1%
Business/attending a conference	1%	-	<1%	3%

### 3.3 Whether part of an organised group/coach party

3.3.1 The vast majority of visitors (87%) were not travelling as part of an organised group or coach party.

	All visitors	Day visitor from home	Day visitor on holiday	Staying visitor
Base	400	92	218	90
Yes	13%	8%	19%	4%
No	87%	92%	81%	96%

### 3.4 Whether first time visitor

3.4.1 Over half of all visitors (53%) were visiting Canterbury for the first time.

3.4.2 When split by domestic and overseas visitors, 61% of all overseas visitors were visiting Canterbury for the first time and 49% of all domestic visitors were visiting the city for the first time.

	All visitors	Day visitor from home	Day visitor on holiday	Staying visitor
Base	400	92	218	90
Yes (first time visitor)	53%	39%	60%	50%
No (repeat visitor)	47%	61%	40%	50%

### 3.5 Average duration of trip

3.5.1 On average, day visitors from home spent 6.07 hours in Canterbury whilst those day visitors on holiday spent 5.27 hours.

3.5.2 Visitors staying overnight in Canterbury spent on average 3.71 nights in the town.

	Base	Avg. duration
Day visitors from home	92	6.07 hours
Day visitors on holiday	86	5.27 hours
Staying visitors	90	3.71 nights



### 3.6 Overnight trip location

3.6.1 'Day visitors on holiday' – overnight visitors staying in accommodation outside Canterbury and visiting the city as part of a day excursion were asked the location of their accommodation. Most were staying in other towns in Kent. The most popular towns mentioned were: Folkestone (35 visitors), Whitstable (17 visitors), Dover (14 visitors), Ashford (10 visitors) and Maidstone (10 visitors).

3.6.2 Three percent of visitors in this category had come to Canterbury for the day from either France or Belgium.

Base	218	
Kent	175	80%
East Sussex	16	7%
Greater London	8	4%
Essex	4	2%
France	4	2%
Belgium	3	1%
Berkshire	2	1%
Buckinghamshire	2	1%
Hampshire	2	1%
Surrey	1	<1%
West Sussex	1	<1%

### 3.7 Type of accommodation used

3.7.1 The majority of overnight visitors stayed in a hotel - 51% of those who were staying in Canterbury. Fewer visitors were staying in the homes of friends or relatives or B&B's.

	Staying visitors	Day visitors on holiday
Base	90	218
Hotel	51%	36%
Home of friend/relative	12%	22%
Rented self catering	4%	14%
B&B/Guest house	12%	8%
Camping	6%	6%
Touring caravan	3%	2%
Static caravan – rented	-	4%
University accommodation	7%	<1%
Boat	-	3%
Pub/inn	-	1%
Youth hostel	3%	-
Host family	-	1%
House swap	-	1%
Static caravan – owned	-	1%
Second home	1%	-

### 3.8 Mode of transport used

3.8.1 Typically, the private motor vehicle was the most common mode of transport used to reach Canterbury (62% of all visitors). However, seventeen per cent of visitors used a bus or coach service as their main form of transport to reach Canterbury.

	All visitors	Day visitor from home	Day visitor on holiday	Staying visitor
Base	400	92	218	90
Car/van/motorcycle	62%	73%	60%	53%
Bus/coach service	17%	12%	23%	7%
Train	8%	7%	6%	12%
Coach tour	6%	5%	8%	-
Walked	6%	-	-	24%
Motorhome	2%	-	2%	2%
Boat	1%	3%	-	-
Bicycle	1%	-	<1%	1%

### 3.9 Level of influence of various aspects

3.9.1 The survey found that the aspect that had the highest level of influence on people deciding to visit Canterbury was the history of the city. Other aspects that had a high influence were the availability of good shopping locations, the culture and arts and visitor attractions.

3.9.2 Aspects that had little influence on the decision to visit included: access for disabled visitors, ease of booking and special interest activities.

	Key influence	Of some influence	No importance
Historic aspects/heritage	83%	3%	14%
Culture/The Arts	44%	24%	32%
Fine dining/Good places to eat	21%	38%	41%
Attractive countryside	32%	28%	40%
Good shopping (quality and range)	49%	18%	34%
Entertainment	9%	17%	75%
Lots for children to see and do	7%	5%	88%
Access/facilities for disabled visitors	6%	1%	93%
Visitor attractions	41%	24%	36%
Quality accommodation	9%	8%	83%
Special interest activities	7%	2%	91%
Ease of booking	6%	3%	91%
Visiting friends and/or relatives	12%	-	88%
Any other aspect	11%	-	89%

### 3.10 Activities undertaken whilst visiting

3.10.1 Visiting somewhere to eat or drink was the most popular activity undertaken by visitors to Canterbury, with 79% of all visitors undertook this activity. Nearly two thirds of all visitors had visited a tourist attraction, but this was more popular amongst day visitors on holiday and staying visitors rather than day visitors from home. Two thirds of all visitors also want shopping whilst visiting Canterbury.

	All visitors	Day visitor from home	Day visitor on holiday	Staying visitor
Base	400	92	218	90
Visiting/meeting friends/relatives	11%	8%	11%	14%
Attend an event	4%	5%	1%	8%
Visit a tourist attraction	57%	42%	63%	59%
Participate in another activity	3%	5%	1%	4%
Shopping	67%	68%	67%	67%
Visit a pub/tea room/restaurant/etc	79%	75%	83%	73%
Go on a guided walk	2%	1%	1%	4%
Other	15%	10%	18%	12%

3.10.2 When asked to name the tourist attraction visited, unsurprisingly the majority of visitors named the Cathedral (93%). Other attractions mentioned included boat trips, Canterbury tales, St Augustine's Abbey and museums.

3.10.3 Four percent of visitors had attended an event. These included a show at the Marlowe Theatre, choir recitals, sporting events and open days at the University.

3.10.4 Other activities accounted for fifteen percent of all activities undertaken by visitors to Canterbury. General sightseeing around the city was named by 96% of those in this category.

### 3.11 Other East Kent locations visited

3.11.1 Forty-two percent of all visitors said that they would be visiting another destination in East Kent whilst on their visit to Canterbury that day. Only 16% of day visitors from home were intending to visit another destination compared with 52% of day visitors on holiday and 42% of staying visitors. The most popular 'other' destinations were: Whitstable, Dover, Herne Bay and Broadstairs.

	All visitors	Day visitor from home	Day visitor on holiday	Staying visitor
Base	166 (42%)	15 (16%)	113 (52%)	38 (42%)
Whitstable	43%	47%	41%	50%
Dover	42%	7%	49%	37%
Herne Bay	28%	13%	25%	42%
Broadstairs	23%	-	27%	18%
Margate	16%	20%	16%	16%
Sandwich	15%	-	17%	16%
Ramsgate	12%	7%	12%	13%
Folkestone	11%	-	15%	3%
Other	14%	27%	13%	11%

## 4 Survey findings: Destination marketing

### 4.1 Information used to plan trip

4.1.1 Fifty-seven per cent of visitors had not searched for destination information from any particular source pre-trip – rather they relied on their previous knowledge. This is not surprising due to the relatively high number of repeat visitors (47%).

4.1.2 Overseas visitors tended to use more formal sources of information about the area than domestic visitors.

	All visitors	Domestic visitors	Overseas visitors
Base	400	268	132
Previous knowledge/Did not use any information	57%	65%	42%
Advertisement	1%	<1%	1%
Brochure	2%	1%	2%
Website	24%	21%	28%
TIC at destination	1%	<1%	2%
Friends/relatives	10%	8%	13%
Guide book about the area	17%	9%	32%
Members guide book	<1%	<1%	-
Other	1%	1%	2%

### 4.2 Websites used

4.2.1 Of the 94 visitors who used the web to search for information, twenty visitors had searched for destination information on Canterbury Tourism and a further fourteen visitors had used Google to search for the word 'Canterbury'.

Base	94
Canterbury Tourism	20
Google search on Canterbury	14
Visit Kent	10
Visit Canterbury	6
Canterbury Cathedral	5
Kent attractions	2
Canterbury Park & Ride	2
Other (one off's)	16
Don't recall	19

## 5 Survey findings: Visitor expenditure

### 5.1 Staying visitor expenditure

- 5.1.1 The average overall expenditure among staying visitors to Canterbury (per person per 24 hours) on eating out, shopping, entertainment and travel and transport was £43.65. Eating out and shopping accounted for the highest proportion of expenditure.
- 5.1.2 The average total spend for staying visitors using commercial accommodation was estimated to be £31.52 per person per night on accommodation, making a total spend per person per night of £75.17.
- 5.1.3 However, many visitors were accommodated in the homes of friends or relatives and therefore spent little or nothing on accommodation, bringing the overall average spend on accommodation for all staying visitors down to £24.79 per person per night. The total average spend for staying visitors not in commercial accommodation per person per night is £68.44

Eating out	£15.47
Shopping	£16.48
Entertainment	£5.22
Travel/ transport	£6.48
<b>Sub-Total</b>	<b>£43.65</b>
All commercial accommodation	£31.52
All accommodation (inc. friends/relatives)	£24.79
<b>Total (including commercial accommodation)</b>	<b>£75.17</b>
<b>Total (all accommodation types)</b>	<b>£68.44</b>

### 5.2 Day visitor from home expenditure

- 5.2.1 Day visitors from home who are visiting Canterbury spent an average of around £26.95 per person per day in the city, with eating out accounting for the highest proportion of expenditure.

Eating out	£9.85
Shopping	£7.05
Entertainment	£4.50
Travel/ transport	£5.55
<b>Total</b>	<b>£26.95</b>

### 5.3 Day visitor on holiday expenditure

5.3.1 Day visitors from holiday bases outside Canterbury spent an average of around £22.28 per person per day in the city, the lowest average spend amongst the three visitor types.

Eating out	£7.95
Shopping	£7.27
Entertainment	£4.86
Travel/ transport	£2.20
<b>Total</b>	<b>£22.28</b>

## 6 Survey findings: Visitor satisfaction

### 6.1 Overall enjoyment

6.1.1 In terms of overall enjoyment of visit, 78% of visitors to Canterbury rated their enjoyment as 'very high' and a further 21% rated it as 'high' providing an average score of 4.77 out of 5.

Base	398	
Mean	4.77	
Very low	-	-
Low	-	-
Average	5	1%
High	82	21%
Very high	311	78%

### 6.2 Likelihood of recommendation

Overall, ninety-one percent of visitors to Canterbury felt that the likelihood of them recommending the city to somebody else was 'very likely' and a further 8% felt it to be 'likely'. The average score was 4.88 out of 5 is exceptionally high.

Base	400	
Mean	4.88	
Very unlikely	-	-
Unlikely	-	-
Possibly	8	2%
Likely	30	8%
Very likely	362	91%

### 6.3 Most 'liked' aspects of Canterbury as a destination

6.3.1 All visitors were invited to mention aspects they most liked about their visit to Canterbury. All visitors responded to this question and mentioned 15 different aspects. Of these visitors, 216 (54%) mentioned the historic buildings. Just over a quarter (28%) mentioned that they liked the general atmosphere and 25% liked the Olde Worlde feel of the city. The aspects mentioned are listed overleaf.

### **Aspects most liked:**

Base	400	
Historic buildings	216	54%
Atmosphere	114	28%
Olde Worlde/Quaint	101	25%
The Cathedral	66	17%
Unique/individual shops	63	16%
Friendly	21	5%
Easy to walk around/Pedestrianised areas	19	5%
Clean	16	4%
Not too big or crowded	14	4%
Lots to see and do	12	3%
Nice places to eat and drink	8	2%
Unspoilt	6	2%
Park & Ride	6	2%
Buskers	5	1%
Stalls in the High Street	1	<1%

## **6.4 Any aspect that spoilt visit to Canterbury**

6.4.1 To provide a balanced picture, visitors were also asked to mention any aspect which spoilt their visit or reduced its enjoyment in some manner. Eighty-four percent of visitors said that 'nothing' had spoilt their visit to Canterbury.

6.4.2 The sixty-four visitors that said their visit to Canterbury had been spoilt in some way mentioned 18 different aspects. Of these visitors, 36 (56%) felt that it was too expensive to go into the Cathedral. The aspects mentioned are listed below.

### **Aspects that spoilt visit:**

Base	64	
Expensive to go in the Cathedral	36	56%
Traffic on ring road	4	6%
Paths need sweeping	3	5%
Litter	3	5%
Too many people/groups	3	5%
Students late at night	2	3%
Lack of toilets	2	3%
Expensive parking	2	3%
Buskers	2	3%
Difficult parking	1	2%
Too much graffiti	1	2%
Cathedral not open completely	1	2%
No hanging baskets	1	2%
Not enough pubs	1	2%
Road closures	1	2%
Park & ride not well signposted	1	2%
Not enough street signs	1	2%
Pickpockets	1	2%



