Ipsos MORI

Canterbury Future Development

Research report prepared for Canterbury City Council

30 April 2012

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Summary of findings and implications

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This report presents findings from an Ipsos MORI survey for Canterbury City Council which involved interviews with 902 residents aged 16+ living within the district area. Fieldwork was carried out face-to-face in-home using Computer Assisted Personal Interviewing (CAPI) in 52 sampling points between 12 December 2011 and 15 February 2012. Ipsos MORI interviewers were set quotas unique to each sampling point, reflecting the known population profile of each point.

At the analysis stage data was weighted by age and gender based on mid-year estimate figures, working status based on data from the 2001 census, district based on population figures and tenure based on the latest regional English Housing Survey data as well as information collected by Kent County Council.

The survey was designed to explore opinion on future development and home building in the district of Canterbury. Specifically, the objectives of the survey were to inform the evidence-base informing future development strategies, to identify the priorities and aspirations of a representative sample of residents and to capture considered, informed opinions on the key issues and a number of possible scenarios for development. It was preceded by a project delivered for CCC by Nathaniel Lichfield and Partners (NLP) and the perceptual data it collected ought to be seen in the context of other evidence and considerations.

Majority support building in principle but most prefer same/slower pace

The survey found majority support among the district's residents for the building of new homes in the district *in principle*. Just under six in ten, 58%, either strongly or tend to support this while there is 22% opposition. When asked about the local area, there is a shift towards opposition but, still, more support than oppose building; 46% against 35%. At both geographies, however, support is not especially strong: 44% *tend* to support this across the district and 34% in their local area. Similar proportions, 13-15%, *strongly* oppose and *strongly* support district building.

While a majority of residents back building in the district in principle, a smaller proportion, 26%, having been exposed to some of the key issues and shown the current rate of building, back more building than in the past (556 homes per year since 1990). At the next question though, and in receipt of further information about the potential impact of building on jobs and population growth, 39% say the Council should choose Option C or Option D which both involve building significantly more than 550 homes (the ten scenarios developed by NLP were reduced to four main options for the purposes of the survey, described in section 2.8). Responses to Q12 are as follows and the full text of the question and 'Info showcard 2' can be found in the appendices:

Table 1: Responses to Q12

	%[1]
Option A (150 homes per year)	16
Option B (550 homes per year)	32
Option C (760 homes per year)	31
Option D (1,140 homes per year)	8
None of these options	9
Don't know	2
Base: all	*902*

Source: Ipsos MORI for CCC

It can be seen that all but 11% back one of the four options presented. Seven in ten, 73%, back an option which involves building at the same level as the South East Plan or more (options B, C or D) while just under half, 49%, back the same or less (options A or B).

Analysis of the survey findings shows that there are some changes in opinion; for example, 60% of those favouring options C and D, which would both involve a faster pace of development than currently, had previously said that they would favour 'the same' amount of development. Still, most residents, although not a majority, prefer the same, or a slower, pace of home building.

Table 2: Summary of resident opinion

	%
Support building new homes in principle in area	46
Oppose building new homes in principle in area	35
Support building new homes in principle in district	58
Oppose building new homes in principle in district	22
Think Council should encourage lot/little more building than in the past (with the current rate of building as context)	26
Think Council should encourage lot/little less building	27
Think Council should encourage the same amount of building	39
Choose an option involving more building than in the past (Options C and D)	39
Choose an option involving the same/less building (Options A and B)	48
Base: all	*902*

Source: Ipsos MORI for CCC

[1] Please note: %s do not sum to 100 due to computer rounding of figures.

There is a strongly conditional nature to public opinion

The findings described above accord with past research by Ipsos MORI and others which have highlighted the conditional nature of public attitudes towards development and the importance of the information presented in testing opinion, and these patterns are also prevalent in the Canterbury survey results. For example, as shown in Table 3 below, there is strong in principle support for building if it means affordable homes for local residents, if it allows young people to stay and if it helps create jobs. In fact, 45% of those who opposed building in the district in principle go on to back it if it meant young people could stay.

Table 3: Percentage point increase in % support for building new homes if…

	All residents	In principle opponents
…it meant that enough affordable homes were provided for local residents	+15	+36
…it increases the demands on public services	-14	+12
…it meant that young people and families could stay	+19	+45
…it meant building on 'greenfield'	-40	+2
…it helped to create jobs by attracting people and businesses to the area	+10	+34
…it meant an increase in traffic and congestion	-36	+2
Base: all	*902*	*202*
Source: Ipsos MORI for CCC	*(100%)*	*(24%)*

By contrast there are a number of anti-development factors which will also be crucial in shaping opinion. There is a swing away from in principle support if it involves building on greenfield; 70% of all residents say they would oppose building in these circumstances as do 65% if it leads to an increase in traffic and congestion.

Table 4: Percentage point increase in % opposition for building new homes if…

	All residents	In principle supporters
…it meant that enough affordable homes were provided for local residents	-7	+5
…it increases the demands on public services	-2	+20
…it meant that young people and families could stay	-12	+2
…it meant building on 'greenfield'	+48	+58
…it helped to create jobs by attracting people and businesses to the area	-3	+8
…it meant an increase in traffic and congestion	+43	+51
Base: all	*902*	*524*
Source: Ipsos MORI for CCC	*(100%)*	*(59%)*

When asked why they chose the option they did, those choosing Option A or B are more likely to provide negative reasons – particularly a concern about greenfield and the volume of housing – while those backing Option C or D explain their choice in positive terms and in respect of jobs and growth. Regardless of the option chosen, concerns focus on greenfield.

Similarly, when asked which of four reasons was most important in shaping why they backed Option C or Option D, jobs and population growth feature most prominently, while those favouring more conservative options A and B identify the amount of housing and building on greenfield as their key reasons.

As with any survey, ours is a snapshot reflecting the backdrop. Residents are strongly satisfied with their local area as a place to live; 53% are *very* satisfied. This comes at a time when national polls show heightened concern about the economy. In the district of Canterbury 69% of residents dispute the idea that there are ‘plenty of employment opportunities in this area’ with even more, 85%, expressing the view that ‘we should do more to help businesses set up here’.

At the same time, though, while 46% agree that new housing developments would help to improve the local economy, 32% do not. Doubts are more pronounced that new development will bring more and better facilities and amenities to the local area. Just under nine in ten, 89%, are of the view that homes should not be built until new infrastructure is in place.

Attitudes are linked to area and demography

So far we have presented findings at the aggregate level but there are some important differences among different types of resident. Although differences between specific demographics are discussed in this section, it should be remembered that demographic groups are often interlinked. This is discussed in further detail in Chapter 3 of the main report.

Younger residents (aged 16-24), a high proportion of whom are students[2], those who live in social or privately rented accommodation, those of lower social grade and those who live in Canterbury City are in general more likely to be pro-development and are more likely to select option C. The primary driver for this group is the desire to see more jobs and more employment opportunities in the area, and they believe that future development can help to provide this. Older, more affluent residents, specifically owner occupiers express more concern about building on greenfield land, with those in Whitstable particularly concerned about whether the level of infrastructure would be able to support future development. There

[2] Off campus students interviewed as part of the main survey include anyone who is still in full-time education at school, college or university.

is also a greater scepticism among this group that building more homes will indeed lead to more employment opportunities in the district.

Ipsos MORI conducted an additional 100 interviews with students resident in campus accommodation at the district's two largest universities, boosting the total number of interviews with students to 165. Students are incredibly positive about Canterbury district as a place to live, however jobs and housing are key issues identified by them as things that need tackling in the area. The importance of these issues to students is highlighted by the gap between those who would like to remain in the area after they graduate, and the markedly lower proportion who see staying as being a possibility.

Students are largely in support of future development, and would be keener to see this taking part nearer to them rather than elsewhere in the district, and express a clear preference among the development options for option C (a small increase in the rate of development). This is primarily driven by the desire to see better employment opportunities in the district.

Looking ahead: key findings and implications

It will be important to be sensitive to the differences across and within the district described above when deciding on the future development strategy and also when communicating any decision Councillors make. In addition, it will be important to take into account that a third of residents currently doubt the premise of building more homes if that premise were that more homes were needed. The amount and quality of housing is a second-order issue of concern, some distance behind a desire for improvement in respect of growth and infrastructure, especially roads, and these plus safety are, by some distance, residents top priorities for Council action. There is some evidence to suggest that this 'enough' sentiment is stronger than it is elsewhere – for example, according to the British Social Attitudes Survey one in five British adults maintain that no new housing is needed in their area. In principle opponents, and supporters of Options A and B, are more likely to doubt the need for housing in Canterbury than residents as a whole.

Related to this, the growth opportunities of development would seem to have more weight with residents. There is a clear perception that local economic growth and job opportunities need bolstering. The two issues which separate supporters and opponents most are that the former are much more likely to think new housing developments would help to improve the local economy and that this will secure better facilities and amenities. And opinion swings towards the larger scale development options after exposure to growth issues. While only a quarter, 26%, backed a larger-scale of building than at present at Q11, 39% chose option C or D at Q12.

On the flip side, while 58% back building in principle, support cools when residents are presented with details and 48% back options which involve the same or fewer homes per year than at present, albeit with 73% still supporting the South East Plan or greater in terms of future development. Opinion swings against development in principle where building on greenfield is involved and this is a clear concern for both supporters and opponents of development and, particularly, those choosing Options A and B among the four options (as presented to respondents, each will involve some building on greenfield). The survey found very strong satisfaction with the local area and 40% of residents identify the countryside and the natural environment as something important in making somewhere a good place to live, third only to safety and health services among a list of thirteen.

It is also clear that residents need convincing about whether development will actually lead to 'planning gain', including jobs and enabling local families to stay. These have the potential to secure greater support for housing development; for example, although in principle opponents remain opposed to building whatever the potential benefits, a significant proportion – 45% – swing towards support when presented with the prospect of building meaning that young people and families could stay. Therefore being able to convince residents that this will actually happen is likely to be a stiff challenge. In addition, on the evidence of this survey, residents will need to be impressed by plans to remove the negative impact of development, especially pressure on local infrastructure, if they are to support future development schemes.

While this highlights the value of looking at the issue of development holistically and assembling development strategies which do not focus exclusively on housing (and are able to maximise side-benefits and minimise negative impacts), it is also important to avoid losing sight of other issues including the *where?* and *what?* of development. The survey does point to strong interest in building family homes across the district, but these represent 'snapshots' of public opinion and further research and consultation will be valuable.

Residents' views appear to be fluid and conditional rather than fixed and settled. This is illustrated by some inconsistencies between responses at different stages of the interview and the changes of opinion (seen at the aggregate level and when the data is disaggregated) as our questionnaire moved from taking in principle views to more informed stances. Attitudes are also likely to be shaped by the very different, and changing, socio-economic backdrop in Canterbury during the planning and implementation of the district's development and it will be important to be sensitive to this.

The detail of any development plan, the way schemes are presented, and clarity about what these mean in practice for individuals and communities, will all play a key role influencing opinion; the survey shows that there is strong *in principle* support for home-building but some conservatism about the extent of building. Also crucial will be effectively addressing the greenfield issue and the trade-offs between the natural and built environment. Exploring the link between homes and growth will be vital too, as will answering three key questions; is this at all proven, can it be communicated effectively to residents, business and other local groups, and will it be realised in the years ahead?

1. Background and methodology

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Changes to the planning system, including the abolition of Regional Spatial Strategies (including the South East Plan) mean that it is the responsibility of local authorities to determine the development requirements for their district, based on evidence and taking account of national policy.

The Localism Act requires that planning is both effective and democratic, and based on “an understanding of the aspirations of the community”. These can be articulated through consultation but while consultation is designed to allow all interested parties the opportunity to share their views, public opinion research can provide robust data by soliciting the views of a *representative* cross-section of the local community, not just the people who are interested in, or aware, of potential development and who put themselves forward. This is important because we know that there can be real differences between the findings generated by consultation and *representative* survey research.

This report presents the findings of a representative survey of public opinion carried out by Ipsos MORI on behalf of Canterbury City Council (CCC). The purpose of the study has been to explore opinion on future development and home building in the District of Canterbury. Specifically, the objectives of the survey were to:

- inform the evidence-base informing Canterbury’s development;
- identify the priorities and aspirations of a representative sample of residents; and
- capture considered, informed opinions on the key issues and a number of possible scenarios (informed by a project delivered for CCC by Nathaniel Lichfield and Partners) based on an appreciation of the implications.

1.1 Sampling and data collection methodology

We used face-to-face in-home interviewing in order that visual stimulus could be used and to aid presentation of the scenarios. A telephone alternative would have allowed us to employ a quota-based approach to sampling but would have been more limiting in terms of the information we could present. Postal and online self-completion surveys are less robust – respondents to both are self-selecting and there are coverage biases involved in using online approaches given the profile of the non-online population.

The survey population included all residents aged 16+ in the district of Canterbury and resident at a permanent address on the Postal Address File (PAF) which was used as our sampling frame. To deliver a representative sample of Canterbury residents we used random location quota sampling. This involved the random selection of sample points from across all areas of the local authority area, ensuring that their distribution reflected the population distribution.

Ipsos MORI interviewed a representative sample of 902 Canterbury residents (aged 16+) across the CCC area and within 52 sampling points each derived from a combination of two Census Output Areas.[3] The sample was structured, or stratified, to ensure 225 interviews in each of Canterbury City, Whitstable, Herne Bay and the rural districts, with an additional 100 interviews conducted with students living in on-campus accommodation.

Interviews were carried out face-to-face, using Computer Assisted Personal Interviewing (CAPI) between 12 December 2011 and 15 February 2012.

Quota controls were placed on specified characteristics and respondents were selected to fit within these quotas. As is typical in resident surveys and reflecting the data available at sample point level, the chosen quotas for the survey in Canterbury were gender, age and working status. Quotas were set by age and gender based on mid-year estimate figures, working status based on data from the 2001 census, and Canterbury district based on population figures, to ensure a representative sample of residents. The data was subsequently weighted by these factors and by household tenure, as discussed in section 1.3 below.

To supplement the survey of residents, additional interviews were carried out with students living in university accommodation. 100 interviews were completed with students at the Universities of Kent and Christchurch. No quotas were set and the data was not weighted as there is no reliable profile data available for this population. As such, the data generated by this exercise was not included with the main general public data, but is commented on separately throughout the report and in a dedicated section within chapter 3.

[3] Census Output Areas are the smallest level at which census data is available. An Output Area (OA) typically comprises 125-150 addresses; a double OA comprises 250-300 addresses.

1.2 Questionnaire development

One of the key challenges involved in a survey such as this is engaging respondents with complex, multi-faceted strategic planning issues or development concepts and scenarios within the confines of a short survey questionnaire. We used a ‘deliberative’ component, providing respondents with some basic information about the options (scenarios) facing CCC as a way of securing a more informed viewpoint.

As mentioned, the survey followed a project delivered for CCC by Nathaniel Lichfield and Partners. This involved analysis and modelling of the economic population and development trends in the area, and the development of scenarios. This report was drafted in October 2011 and was published in January 2012.

In order to ensure that the questions, and in particular the scenarios, presented to the respondents were meaningful and would allow them to make an informed judgement, we conducted a cognitive testing phase before finalising the questionnaire and commencing fieldwork for the survey.

The testing involved 12 in-depth qualitative interviews, conducted over 2 separate days. Participants were recruited from Canterbury city and surrounding areas by Ipsos MORI recruiters in-home/in-street and to set quotas. The quotas ensured that participants reflected a broad range of district residents in terms of age, working status, social grade and the level of rurality in which they lived.

In the interview, they were asked to respond to questions as they would in a survey interview. They were then asked in detail to explain why they selected the responses they did and whether they felt they had concise and clear information with which to answer the questions.

Participants were also asked in detail about the scenarios presented, in order to ensure that the scenarios worked well within the survey questionnaire. This part of the cognitive testing explored how easy the information presented was to understand (by asking them to explain in their own words what the scenario was saying), whether it was balanced and fair, and whether the information was comprehensive and provided the information they needed to make a decision to the questions asked.

This exercise helped to ensure that the questions and scenarios were unambiguous and that respondents were able to understand and utilise the information provided. Trained Ipsos

MORI researchers observed the participants as they responded to the questionnaire to look for any signs of fatigue or miscomprehension.

1.3 Data weighting and interpretation

Data are weighted by age and gender based on mid-year estimate figures, working status based on data from the 2001 census, district based on population figures and tenure based on the latest regional English Housing Survey data as well as information collected by Kent County Council.

It should be stressed that a sample and not the entire population of Canterbury District residents participated in the survey. As a consequence, all results are subject to sampling tolerances, which means that not all differences between sub-groups are statistically significant. A guide to sampling tolerances is appended (Appendix C) but, as a rule of thumb, figures based on the total sample are accurate to within ±3.3 percentage points.

Please note that, in the main, this report only comments on differences that are significant and statistically reliable. However, the report sometimes comments on results for groups with base sizes too low to be tested for statistical significance when the results indicate a trend across the data. When this is the case, it is noted in the text and should be interpreted as 'indicative' of a difference not robust evidence of difference(s).

Where percentages do not add up to 100% this is due to multiple answers, to rounding of decimal points up or down, or to the exclusion of 'Don't know' or 'No response' categories. Where combination figures (such as satisfied or dissatisfied) do not add up to their constituent percentage figures (e.g. Very satisfied plus Fairly satisfied) this is also due to rounding of decimal points up or down.

Where 'net' figures are provided this is the combined positive response to a question minus the combined negative response. For example, net satisfaction is all of those who say they are satisfied minus all of those who say they are dissatisfied. A positive net figure means that more are satisfied than dissatisfied whereas a negative indicates that dissatisfaction is felt by more respondents than satisfaction.

1.4 Structure of this report

All responses have been analysed by a range of demographic, geographical and attitudinal variables. Detailed breakdowns have been provided in computer tables under a separate cover which includes a basic explanation to help those wishing to use the tables.

Our report is structured so that we focus on the key headline findings before disaggregating differences by demography and geography:

1. Summary
2. Headline findings
3. Disaggregation of findings
4. Appendices

1.5 Acknowledgements

Ipsos MORI would like to thank Lorna Ford, Matthew McLellan and Adrian Verrall at Canterbury City Council for their help and assistance in the development of the project. We would also like to thank all of the residents who participated in the survey.

2. Headline findings

2. Headline findings

In this section of the report we provide commentary on the headline findings from the survey confining this to analysis of opinion among residents as a whole. Reference is made to some of the key differences between different types of resident and the different areas of the District, but this is the focus of the third chapter.

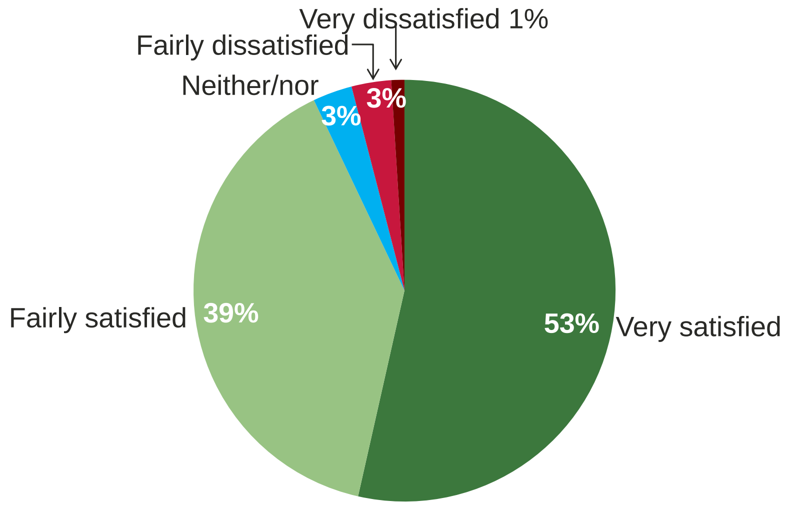
We broadly follow the order of the questionnaire which employed a 'deliberative' approach. It moved from exploring overall opinions of the area before measuring in principle views on home building, then providing respondents with some basic information about the extent of building, followed by questions asking about the options (scenarios) facing CCC as a way of securing a more informed viewpoint.

2.1 Strong satisfaction with the area

Satisfaction with the local area in Canterbury is high with over nine in ten residents satisfied (92%) and over half (53%) *very* satisfied.

High levels of satisfaction with area

Q4. How satisfied or dissatisfied are you with your local area as a place to live?



Base: All respondents (902)

Source: Ipsos MORI

Ipsos MORI
Social Research Institute

This work was carried out in accordance with the requirements of the international quality standard for Market Research, ISO 20252:2006.

Residents of Herne Bay and those living in the rural areas of the district are most likely to say they are satisfied, with residents of Whitstable the most likely to say they are dissatisfied.

As is often the case with satisfaction ratings, ABC1s (managers, administrators, professionals) and those who own their own home are more likely to be satisfied with the local area than C2DEs (skilled/unskilled manual occupations/reliant on state benefit)[4] or social renters respectively. Although there is no difference in satisfaction between those who support and those who oppose future development in the area, it is worth noting that those who are more likely to be dissatisfied, though a very small proportion of residents, are of a similar profile to those who emerge later in the report as key supporters of development.

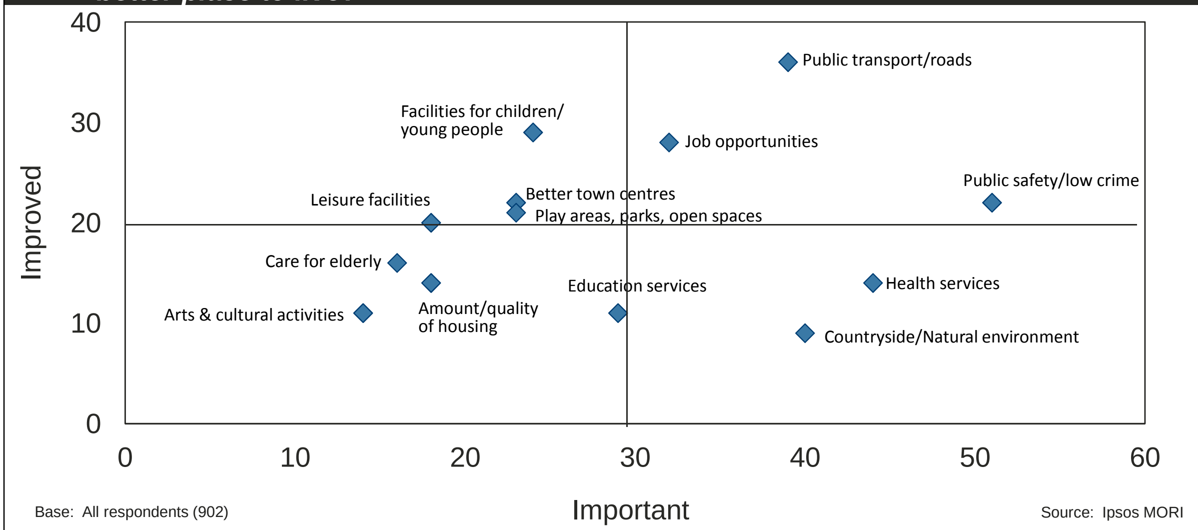
2.2 Traffic and public transport, jobs and the economy key issues

Although satisfaction with the area is high, there are areas in which residents see room for improvement. As shown in the following chart, we can compare what residents see as important in making somewhere a good place to live and the issues they think most need improving in their local area.

Transport, safety and jobs the key areas for improvement

Q5. Which of the items on this list would you say are most important in making somewhere a good place to live?

Q6. Which of the items would you most like to see improved, to make this area a better place to live?



Base: All respondents (902)

Source: Ipsos MORI

Ipsos MORI Social Research Institute

[4] For a full explanation of social grade classifications, please see Appendix B.

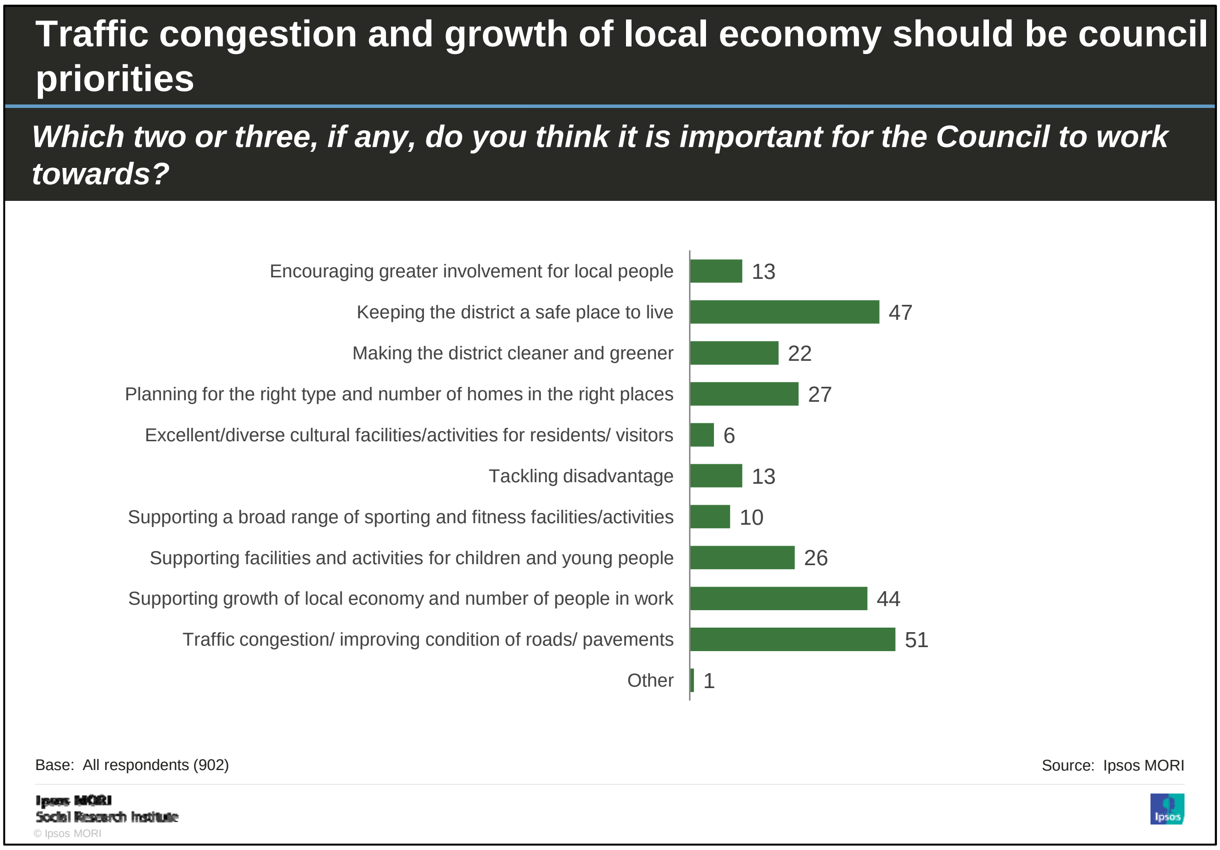
The issues in the top right hand quadrant of the chart are viewed both as most important and most in need of improvement, and arguably any perceived improvements would have the greatest impact on residents' overall satisfaction with the area. There are three issues here public transport (39% say this is important, 36% say it needs improving), public safety (51% important, 22% needs improving) and job opportunities (32% important and 28% needs improving). This points to these being a key focus for action locally, although these are not untypical priorities across the surveys we deliver elsewhere.

Those in the bottom right hand quadrant are among the most important issues but are less of a priority for improvement – health services (44% important, 14% needs improving) and the countryside and the natural environment (40% important and nine percent needs improving). This indicates that, while seen as important, residents are more satisfied with the way in which these services are currently delivered. However, this focus on the importance of the natural environment is something to bear in mind throughout this report as we see how important maintaining greenfield land is in creating support or opposition for future development in the area.

Those in the top left hand quadrant – facilities for children and young people, play areas and open spaces, better town centres and leisure facilities – are of relatively lower importance to residents but are seen as in need of improvement.

There are a further four issues in the bottom left hand quadrant. These are seen as less important generally and less in need of improvement. However, this does not mean that they should be ignored as the chart plots relative positions and only small changes in attitudes would mean that, for example, education services would become among the most important issues locally.

These priorities are reflected in responses to the following question about council priorities for the area. Of the ten council priorities presented, over half (51%) of residents think that tackling traffic congestion and improving the condition of roads and pavements is one of the most important, with a similar proportion (47%) wanting the council to focus on keeping the area a safe place to live. A fifth (44%) mention supporting the growth of the local economy and the number of people in work as a top priority for the council. Just over a quarter (27%) mention planning the right number and right type of homes as a priority.



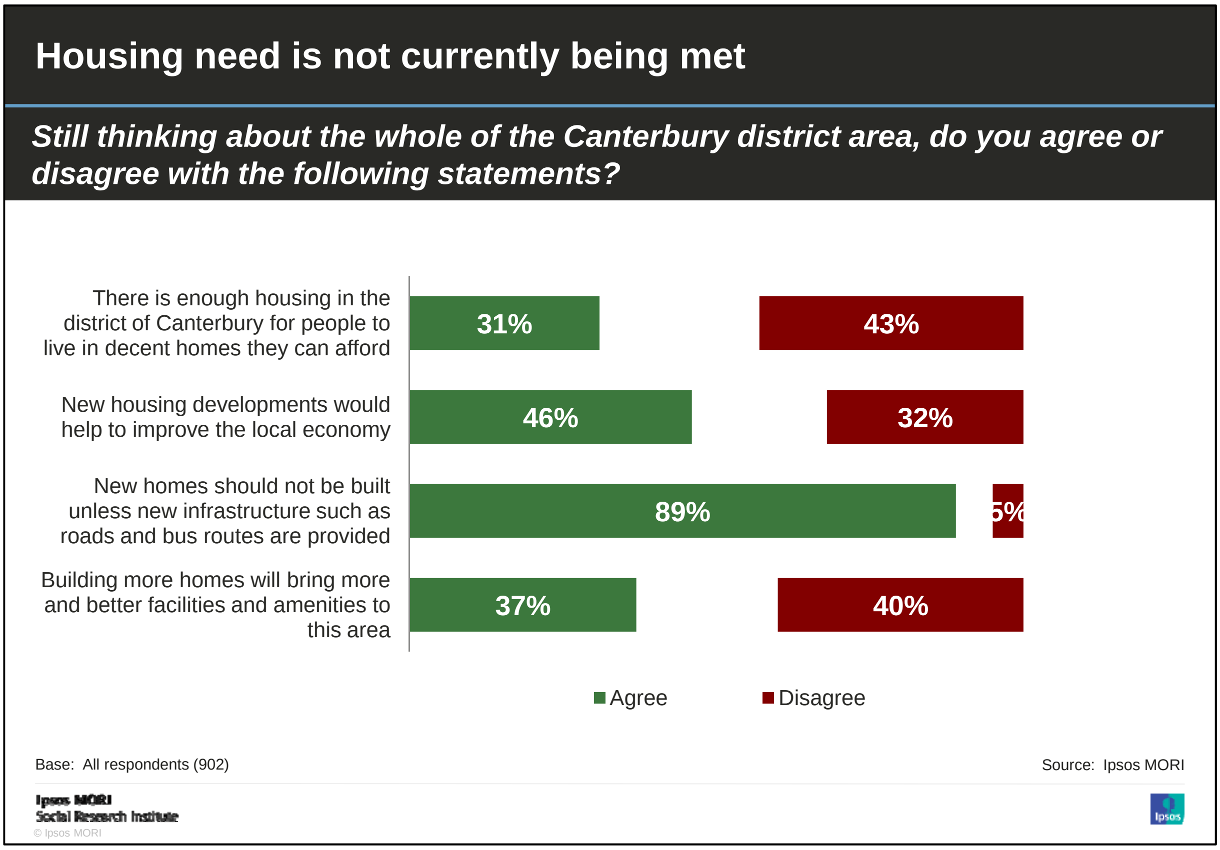
Those who are currently in employment are more likely than other residents to see employment and the local economy as a priority. Older and retired residents and home owners are most likely to believe the council should prioritise housing issues. Safety is a stand-out priority in Whitstable and Herne Bay (56% and 52% respectively mentioning this) with supporting facilities and activities for young children a relative priority for those living in rural areas (33%).

2.3 Housing need less acutely felt

Housing is a key issue for residents in Canterbury, although it is not spontaneously seen as the most important priority or area in most need of improvement. When asked about specific housing related issues, however, it is clear that there are residents who feel that there is a housing need not currently addressed.

Under a third (31%) of Canterbury residents agree that there is enough housing in the district of Canterbury for people to live in decent homes they can afford, with two fifths (43%) disagreeing and one in six (17%) strongly disagreeing.

More residents agree than disagree that building new homes would help to improve the local economy (46%), with a third (32%) disagreeing, although more disagree than agree that new developments would bring more and better facilities and amenities to the area (40% compared to 37% agreeing). While this shows that there is support for some aspects of new development, nine in ten residents (89%) say that no new homes should be built unless new infrastructure is also provided.



There are no significant differences in the profile of those who disagree that there is affordable enough housing among residents across the district.

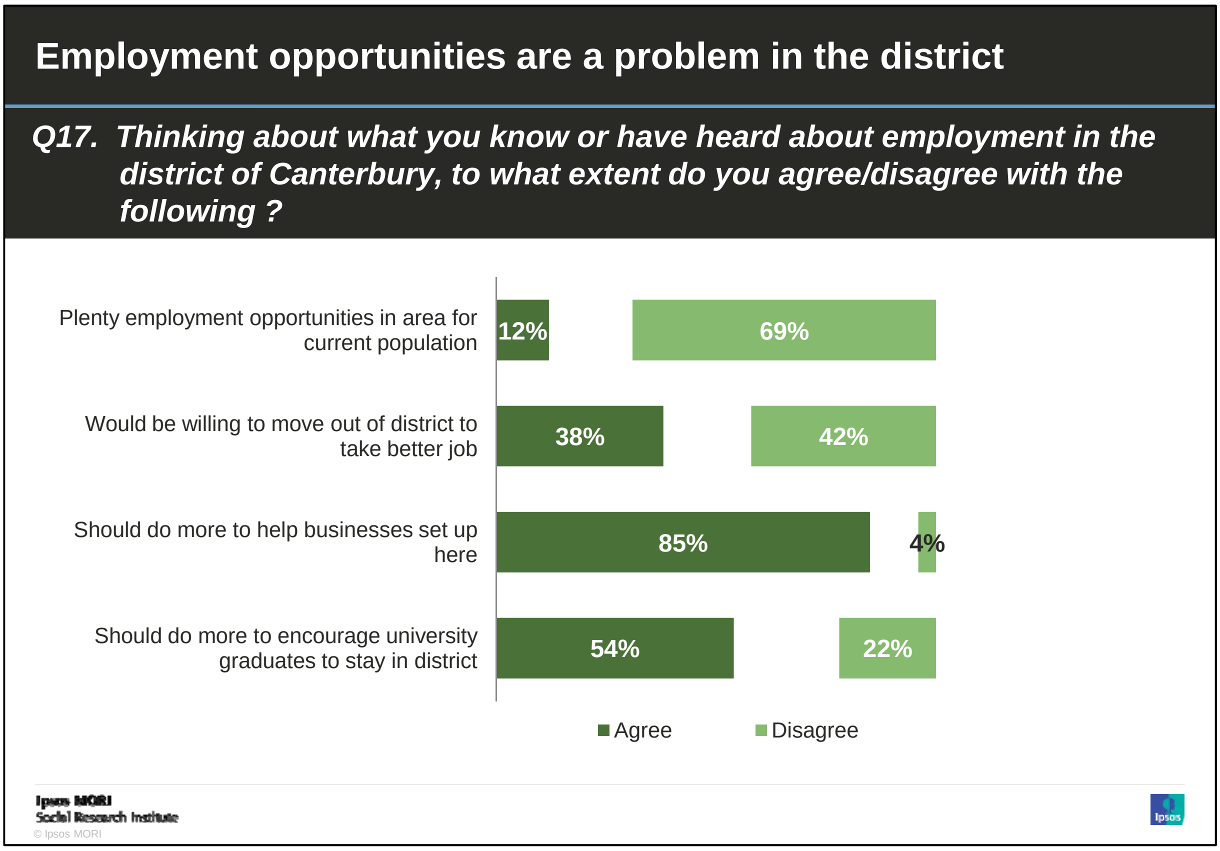
Residents who feel that new development will help the economy are most likely to be younger (16-24), male, social grade C2DE and currently living in social or private rented flats. As will be discussed in more detail in sections 2.5 to 2.8 of this report, those who support new development in their local area, in the district as a whole and those who would like to see a development plan involving an increase in the average number of houses currently built per year, are all more likely than residents as a whole to agree that new housing developments would have a positive impact on the local economy.

Those who are most likely to say that new development should only be built in conjunction with new infrastructure are those aged over 65, who have lived in the area for longer and those who own their own homes. This is also a particular concern for those living in Whitstable, relative to those living across the rest of the district.

2.4 Strong perceived need for job creation

Developing employment and the local economy is the third ranked priority (among Council priorities) for the local area by residents. There is strong disagreement with the idea that there are plenty of employment opportunities for the current population (69% with 12% agreeing). A third (33%) strongly disagree that this is the case.

This is perhaps compounded by the fact that less than two fifths of the population (38%) would be prepared to move out of the district to take a better job, with more disagreeing (42%) that this is something that they would be prepared to do. There is also strong agreement with the idea that more should be done in order to help businesses set up in the area (85% compared to four percent who disagree).

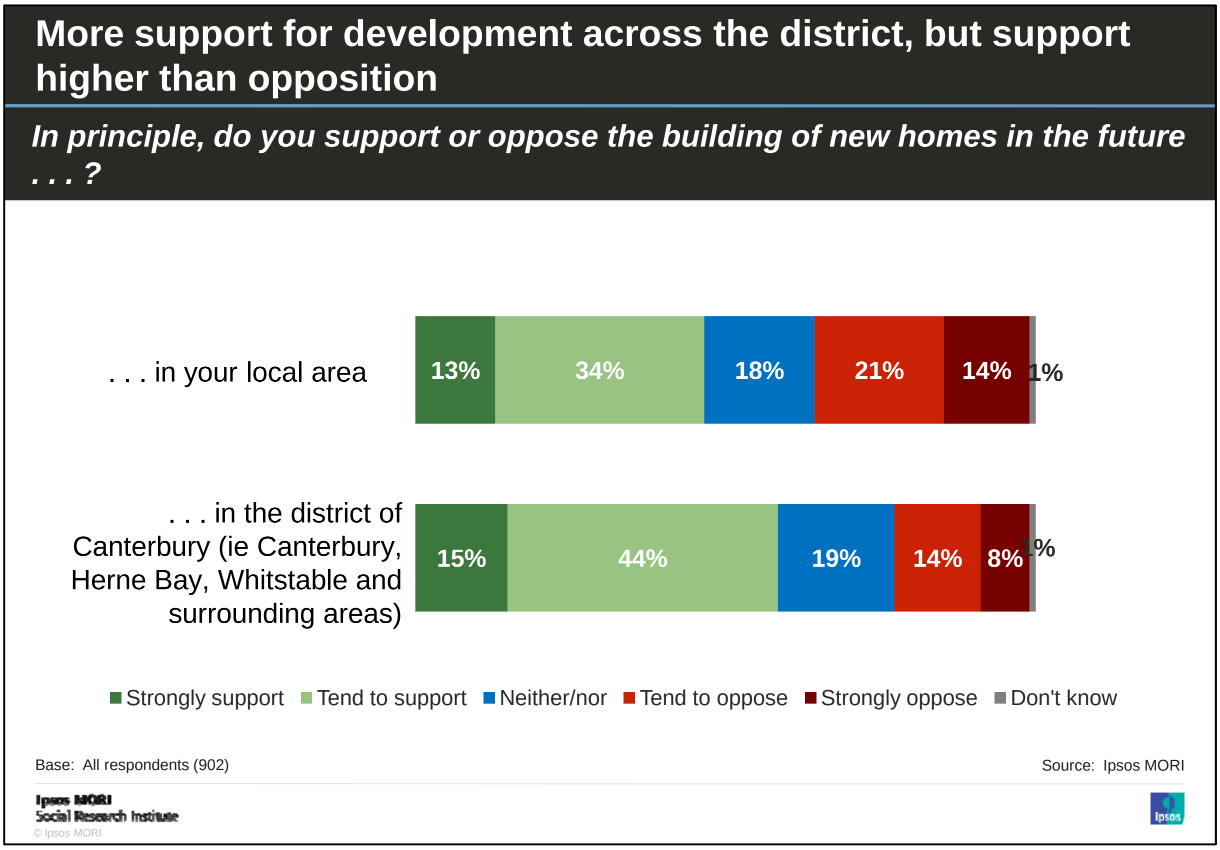


It is worth noting that these questions were asked after the questions on future development in Canterbury, and after respondents had been shown information about employment in the district. They are also likely to reflect current anxiety about economic conditions seen across the country; our national polling shows that 38% of Britons feel the economy is the most important issue facing Britain today with unemployment (mentioned by 18%) the second most important.

2.5 'In principle' support towards future development

Respondents were asked for their 'in principle' attitudes towards future development both in their local area and within the district of Canterbury. The local area was a respondent-led definition, unless queried in which case the interviewer defined this as an area within a 10-15 minute walk of where the respondent was living. The district of Canterbury was defined as covering the Canterbury City Council area illustrated by a map attached in Appendix A.

As is often the case in our experience, respondents are more likely to support building in the area as a whole than in their local area. Almost six in ten (58%) support building across the district of Canterbury, with just under half (46%) supporting building in their local area. However, there is net support for development of new homes both locally and on a district level, with opposition voiced by around a fifth (22%) of respondents when thinking about the district and a third (35%) when thinking about their local area.



Supporters of development in both the local area and in the district more broadly are most likely to be younger residents, aged 16-24, students and those living in Canterbury City itself. Those who have been living in the city for less than 5 years, those who are either social or private renters as opposed to owner occupiers, and those who live in flats are also more likely to be in support of the future building of homes. This suggests that supporters have had more recent contact with the housing market and have not yet established themselves in their own home. Support may be facilitated by having more information about the local housing market, or due to the fact that housing is a greater top of mind issue for this group given their own circumstances.

Supporters are also likely to be those more concerned with the growth of the economy as a priority and those who say that job growth is a priority when making a future development decision. However, there is no significant difference between those who agree and those who disagree that there are currently enough employment opportunities available in the district.

2.6 Conditions attached to 'in principle' support for development

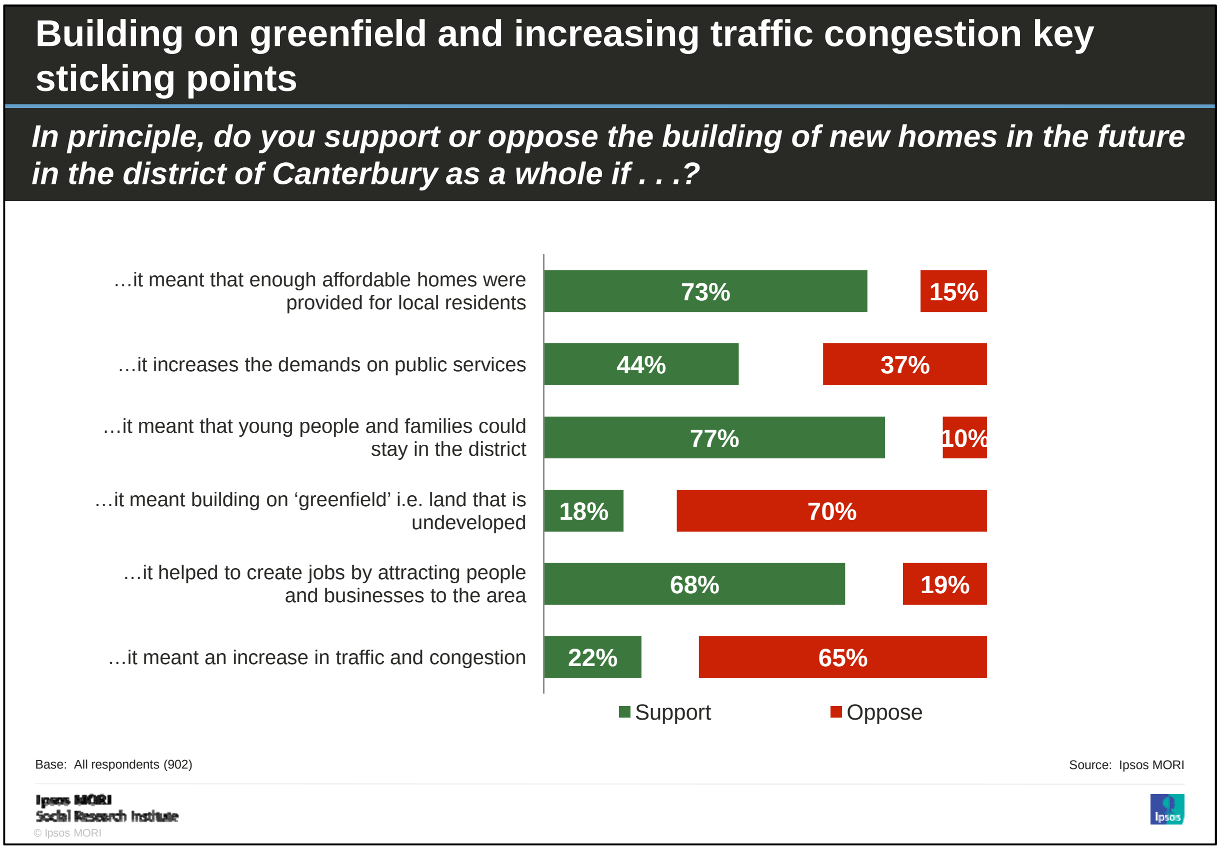
As would be expected, support for future housing is conditional upon the development taking account of local needs and concerns. Following the question asking in principle support or opposition to future development – which found 58% in support and 22% opposed – respondents were asked to express support or opposition to development given certain conditions. This approach was used in order to establish some of the drivers for support and opposition to the idea of district level development in principle.

Support is strongest for development where it would mean that children and young people would be able to stay in the area, with over three-quarters (77%) of residents supporting development for this reason. Residents are also positive about development where it would mean that enough affordable homes are provided for local residents (73%) and where it would help create jobs by attracting people and businesses to the area (68%).

The most opposition to future development is created by the idea of building on 'greenfield', or land that is undeveloped. Seven in ten (70%) residents say that they would oppose further development if greenfield sites were used, with less than a fifth (18%) supporting home building in this case.

Net opposition was also generated where future development would result in an increase in traffic and congestion, with around two thirds opposing any development that would cause further problems in this area. We know that public transport and roads are considered one of the top three most important considerations in making an area a good place to live (mentioned by 39% of residents) and are the top priority for improvement in the district (mentioned by 36% of residents) and, therefore, it is unsurprising that the thought of increasing pressure on this element of the district's infrastructure would result in increased opposition to future development.

Although roads and transport are a key issue, an increase in the demands on public services is less likely to affect support. Just over two fifths (44%) of residents support future housing development even with increased demand on public services with just under two fifths (37%) opposing the idea.



Supporters for future development which would see enough affordable homes provided for residents mirror those who offer in principle support for future development in the district. They tend to be younger, Canterbury residents and living in flats. They have moved to the area more recently and are most likely to be renting a property currently. As well as being more likely to be students, those who would like to see more affordable housing provided are also likely to be those who are unemployed (87% and 84% respectively compared to 68% of those who are employed or retired). It should be remembered that the definition of affordable homes will have a different meaning for residents in different circumstances.

While those who say they would support future development in order to allow young children and families to stay in the area are also more likely than the total to be more recent residents, renters and unemployed, there are less demographic differences between supporters. This is likely to be due to the fact that asking respondents about young children and families takes them away from thinking only about their own situation and asks them to focus on the potential future situation of family, friends and other residents. It is therefore encouraging to see that the highest level of in principle support is for providing housing that will allow others to remain in the area also.

Those who say that they would oppose future development if it involved building on greenfield are those who are most likely to oppose development in principle regardless of conditions. They are most likely to be those who have lived in the area for five to ten years, with those who have lived in the area for more than ten years being most likely to strongly oppose development on greenfield land. Tenure is also important, with three quarters (74%) of owner occupiers opposing development on greenfield and eight in ten (80%) of those living in bungalows, compared to total opposition from 70% of residents.

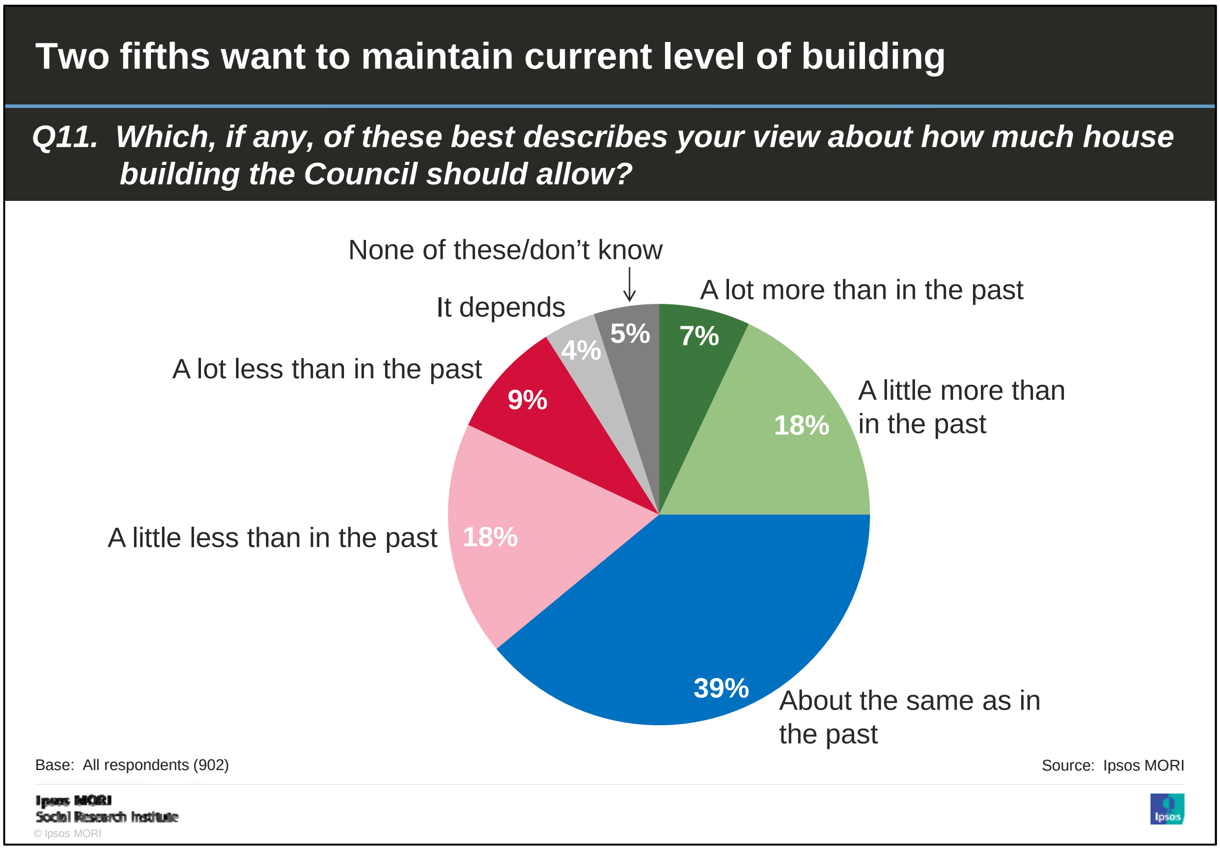
2.7 Residents split on more or less building than in the past

In order to feed into Council considerations about the future of development, it was important to assess how residents felt about the level of future development. To provide context survey respondents were presented with the following information:

Canterbury district: key information	
Housing:	• There are currently 64,015 homes (houses, flats etc.). • An average of 556 new homes have been built per year since 1990. • Around four in ten of these have been built in the city of Canterbury.

Respondents were then asked for their views on development for the future, based on what they have been told is the current housing state in the area.

Almost two thirds (64%) of residents say they would like to see the same or a greater number of homes being built going forward, with around a quarter (26%) saying they would like to see more than in the past, and a similar amount (27%) saying that they would like to see less development than over the last twenty years.



There are few demographic differences between those who would like to see more building in the future and those who would like to see less. The drive for an increase in development appears to be closely linked with socio-economic factors, with social grade C2DE and those living in social rented accommodation more likely to support this course of action. Those who select job growth and housing as the key factor in choosing a development plan are also most likely to support a development increase.

2.8 Options B and C most popular options

Prior to conducting this survey, Canterbury City Council had commissioned a report from NLP to assess the housing and development need in Canterbury over the next fifteen to twenty years. The NLP report presents ten different scenarios, based on the level and profile of population change and the level of infrastructure needed to support that. The NLP development scenarios were divided into four different groups: policy and supply-led, economic-led; demographic-led; and housing-led.

In order to present this information to the general public for the purposes of the survey, the ten NLP scenarios were condensed to four options reflecting the four bands NLP have identified as follows:

Table 5: NLP scenarios and broad option bands

Band	Scenarios	No. of dwellings p.a.
1: Lower end	A, H	80-150
2. Lower mid-range	B, C, D	500-650
3. Upper mid-range	E, G, I	650-800
4. Upper end	B, C, D	1,100-1,200

Source: NLP for CCC

The four options gave directional forecasts for population and employment if different numbers of new homes were built in the area, but did not present numbers, as these would be projections only and dependent on a greater number of factors than those dealt with (e.g. migration into and out of the district). It was also presented to respondents that all options would require some development on greenfield land. The scenarios used in the survey are shown below:

Option A	
Housing:	**Delivery of 150 new homes per year**
Implications	It is estimated that this amount of building would mean the district's population getting smaller in the future. There is also likely to be a significant reduction in the number of jobs.

Option B	
Housing:	**Delivery of 550 new homes per year**
Implications:	It is estimated that this amount of building would support population growth in the future. There would be virtually no change in the number of jobs.

Option C	
Housing:	**Delivery of 760 new homes per year**
Implications:	It is estimated that this amount of building would support more substantial population and job growth in the future.

Option D	
Housing:	**Delivery of 1,140 new homes per year**
Implications:	It is estimated that this amount of building would support the most substantial population and job growth in the future.

Alongside the scenarios respondents were also shown some key information on the current state of housing, population and employment in the District of Canterbury in order to provide context for the options.

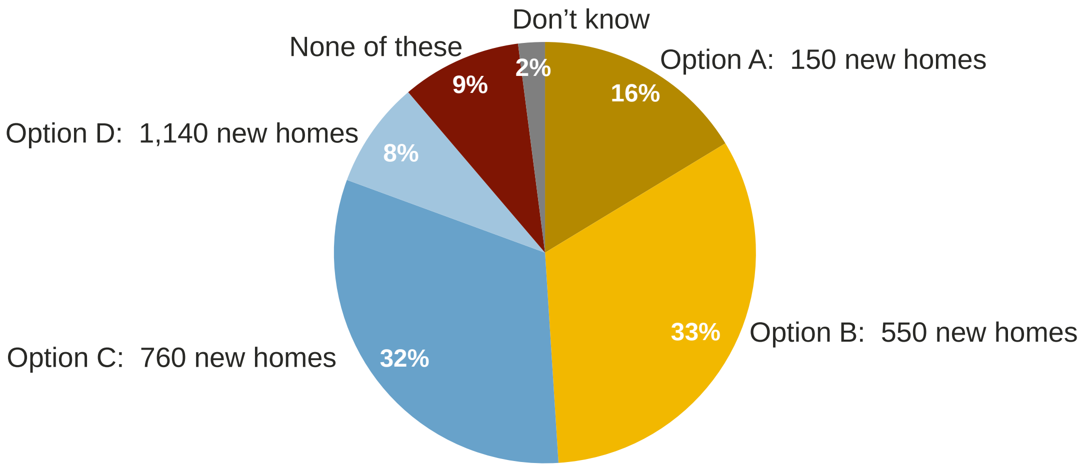
Canterbury district: key information	
Housing:	• There are currently 64,015 homes (houses, flats etc.). • An average of 556 new homes have been built per year since 1990. • Around four in ten of these have been built in the city of Canterbury.
Population:	• The current population is 147,700 people. • The population has grown by an average of 1,242 per year since 2001. • Currently, more people come to live in the district than leave.
Employment	• There are currently 59,000 jobs in the district of Canterbury. • An average of 440 new jobs per year have been created since 1998. • About 7 in 10 jobs in the district are in retail, tourism, education, health or elsewhere in the public sector.

As part of the preamble to the question respondents were told by interviewers that they did not have to choose one of the options if they did not wish to.

From the four options presented, around a third (32%) say that they would choose option B, involving a level of building similar to that over the last twenty year period, with a similar proportion (31%) selecting option C, an increase to around 760 new homes per year. Around one in six (16%) say that they would like to see building reduced to around 150 new homes per year and just under one in ten (eight per cent) would like to see the current rate of building doubled to around 1,140 new homes per year.

A third would choose the same level of building, and a further third a smaller increase in building

Q12. Which of these options, if any, do you think the Council should choose?



Base: All respondents (902)

Source: Ipsos MORI

Ipsos MORI
Social Research Institute

Below, we provide some profiles of the residents selecting each of the different development options. Please note that these profiles provide a description of the demographic groups most likely to say that they support each option. This does not provide a statistically-based segmentation of the data.

Option A

Around one in six residents wanted to see a reduction in development as described in option A. Residents who are most likely to have selected this option are:

- those who have **lived in the area for more than ten years**
- those who **own their own houses**

- those who **oppose development in the area and in the district**
- those who **do not see any positives to development**.

Supporters are most likely to cite **maintaining greenfield land** as the key factor in making their decision.

Option B

Option B was selected by around a third of residents. Residents who are most likely to have selected this option are:

- those **living in Herne Bay**
- those who **own their own homes**
- those who are **more likely to oppose than support building in their own local area**, although there is **no difference between those who support or oppose building in the district** as a whole.

Supporters are most likely to cite **maintaining greenfield land** as the key factor in making their decision.

Option C

This option received a similar level of support to option B. Residents who are most likely to have selected this option are:

- those who are **younger** (aged 16-24) and therefore those who are **students** (whether at college or university)
- those who have **moved to the area within the last five years**
- those who are living in **private rented accommodation**
- those who are most **concerned with the growth of the economy**
- those who tend to **support building in the area and in the district** with a higher proportion of those selecting option C having **no development concerns**.

Supporters are most likely to cite **job growth** as the key factor in making their decision.

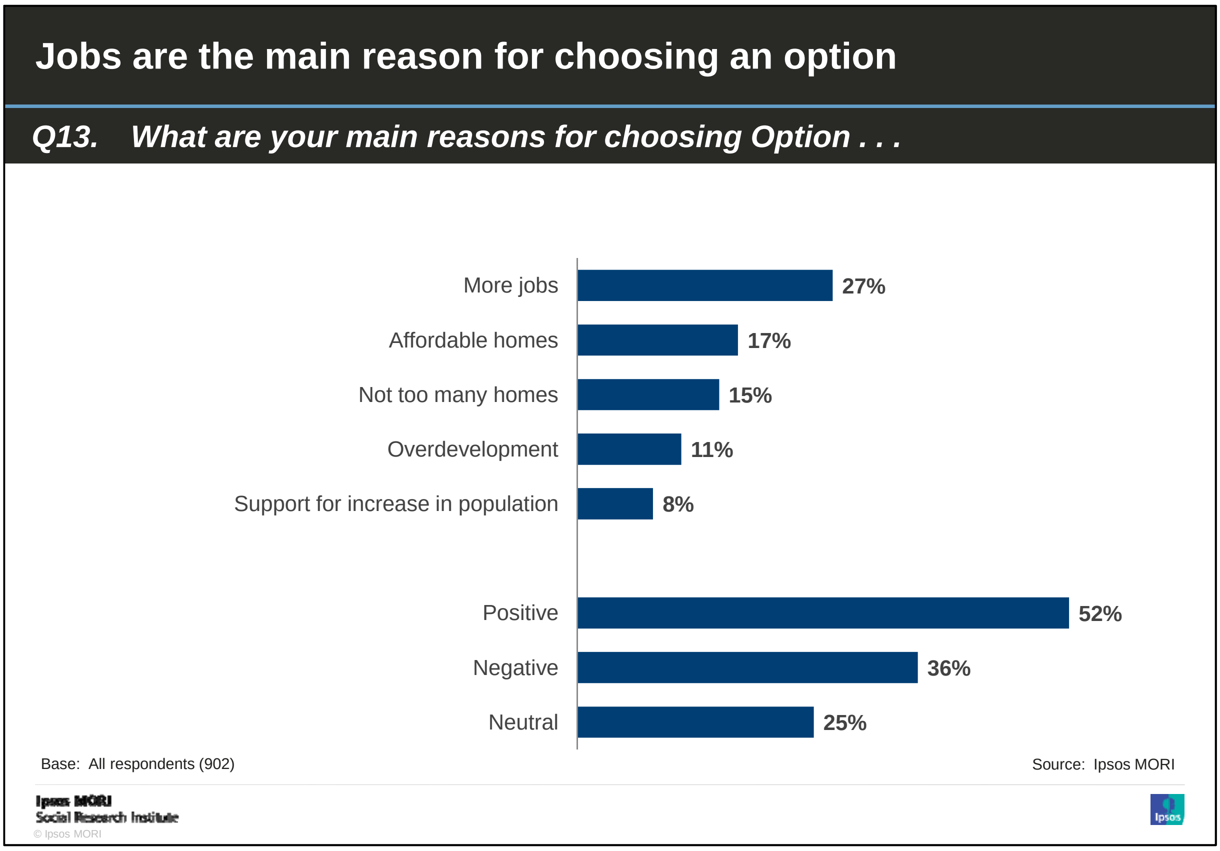
Option D

Just under one in ten residents supported option D. There are few demographic differences between this group, however those **in social grade C2DE** are more likely to support this option. Option D is preferred by those who are most likely to **support development in the area and in the district**. Supporters are most likely to cite **job growth** and **housing growth** as the key factors in making their decision.

2.9 Jobs strongest explanation for option choice

Respondents were asked to give their spontaneous reasons for support and concerns with regard to supporting their chosen option. Once spontaneous views had been captured, respondents were then asked to pick which of the four factors presented for each option (change in housing levels, change in the number of jobs, change in population and building on greenfield) were the most influential factors in making their decision, covered in section 2.11.

The top reasons given for supporting the option chosen are more jobs (27%), affordable homes (17%) and not too many homes (15%).



The reasons given for supporting option B (maintaining the current rate of development) are varied, with one in six (17%) saying that they feel this option presents the right number of homes and a similar proportion (15%) saying that option B represents the best option as there are already enough homes.

Over half (53%) of those who selected option C (some increase in home building) did so because they support the idea of increased job growth and more employment opportunities in the local community. Around a fifth (42%) of those who selected option D did so for this reason also, with a similar proportion (43%) saying their preference for option D is based on a perceived need for an increase in housing, particularly affordable housing.

Of those who selected option A (decreasing the rate at which homes are built) the most common reason given for this is that there are already enough homes in the area and a lack of space (23%) followed by a fifth (20%) of residents who feel that the area is already overcrowded and too densely populated.

One in ten (11%) of those who selected both option A and option B feel that the increase in the number of homes in the area will not impact on the number of jobs or have a beneficial effect on the economy and thus feel that the assumptions made in the information shown are incorrect.

Those selecting an option which requires an increase in the rate of development (options A and B) tend to do so because they feel that aspects of the proposal are positive, such as an increase in the number of jobs or a need for new homes. Residents who selected options B and C are more likely to say they are concerned about the negative impacts of other proposals, such as not wanting an increase in development or population.

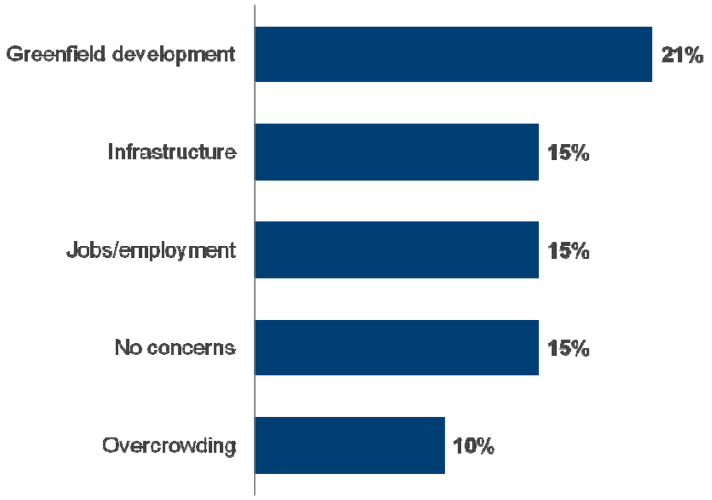
Around one in ten (nine per cent) residents say that they would not select any of the options shown. Of this group a quarter (24%) say that they do not like any of the aspects of the options with which they were presented. One in six (16%) say that they like the idea of jobs, particularly jobs for local people. As this information is based on a small base size, the results should be considered indicative only.

2.10 Greenfield is top concern

The top concerns given by residents with regard to the option chosen are greenfield development (21%), infrastructure concerns (15%) and concerns with regard to jobs and employment (15%).

Greenfield is primary concern over chosen option

Q13. And what, if any, are the main concerns you would have about option. . .



Base: All respondents (902)

Source: Ipsos MORI

Ipsos MORI
Social Research Institute

The concerns residents expressed about supporting option B (maintaining the current rate of development) are varied, with a fifth (20%) saying that they would be concerned about the job growth and economic conditions in this option. Impact on greenfield sites is a concern for a similar proportion (19%) of option B supporters.

Around a quarter (26%) of those who selected option C did so despite concerns about the impact that this level of development would have on greenfield sites. Environmental impact is less of an issue for those selecting option D (18%), however around a quarter (24%) have concerns about how the public infrastructure, such as roads and public services, would be able to cope with the increase in demand from a larger population. Traffic congestion is also an issue for option D supporters, with one in six (16%) saying this would be a cause for concern.

Of those who selected option A, the most common concern mentioned is with regard to the job growth and economic conditions in this option, with almost a quarter (23%) of option A supporters worried about this.

Around one in six (15%) of residents say they have no concerns about their chosen option. This varies little across the different options chosen (13%-16%).

2.11 Greenfield and job growth key factors among four

As mentioned in section 2.9, respondents were also **prompted** as to what the key information was that led to them making their option choice. Job growth was the key factor influencing decisions, mentioned by a third (34%) of residents, with three in ten (30%) saying that the amount of building on greenfield was the most important to them in making their choice. This follows the pattern of concerns we have seen in section 2.9 and 2.10 with job growth being a key reason for option choice and greenfield building being the key concern.

The table below shows the most important factor influencing decisions split by the option chosen. As can be seen, for those choosing options A and B, the key concern is protecting greenfield, while for those choosing options C and D, the key concern is job growth. Notably, housing itself is not a key factor influencing the decision around future development for most. Related factors such as protecting the environment and developing the local economy are more salient for local residents.

Table 6: Most important factor influencing choice among those choosing each option

	Option A	Option B	Option C	Option D
% The amount of building on greenfield	**42**	**40**	13	8
% The amount of job growth	11	19	**59**	**51**
% The amount of population growth	21	21	14	15
% The amount of housing	24	19	14	24
Base: all	*145*	*289*	*287*	*75*
Source: Ipsos MORI for CCC	*(16%)*	*(32%)*	*(31%)*	*(8%)*

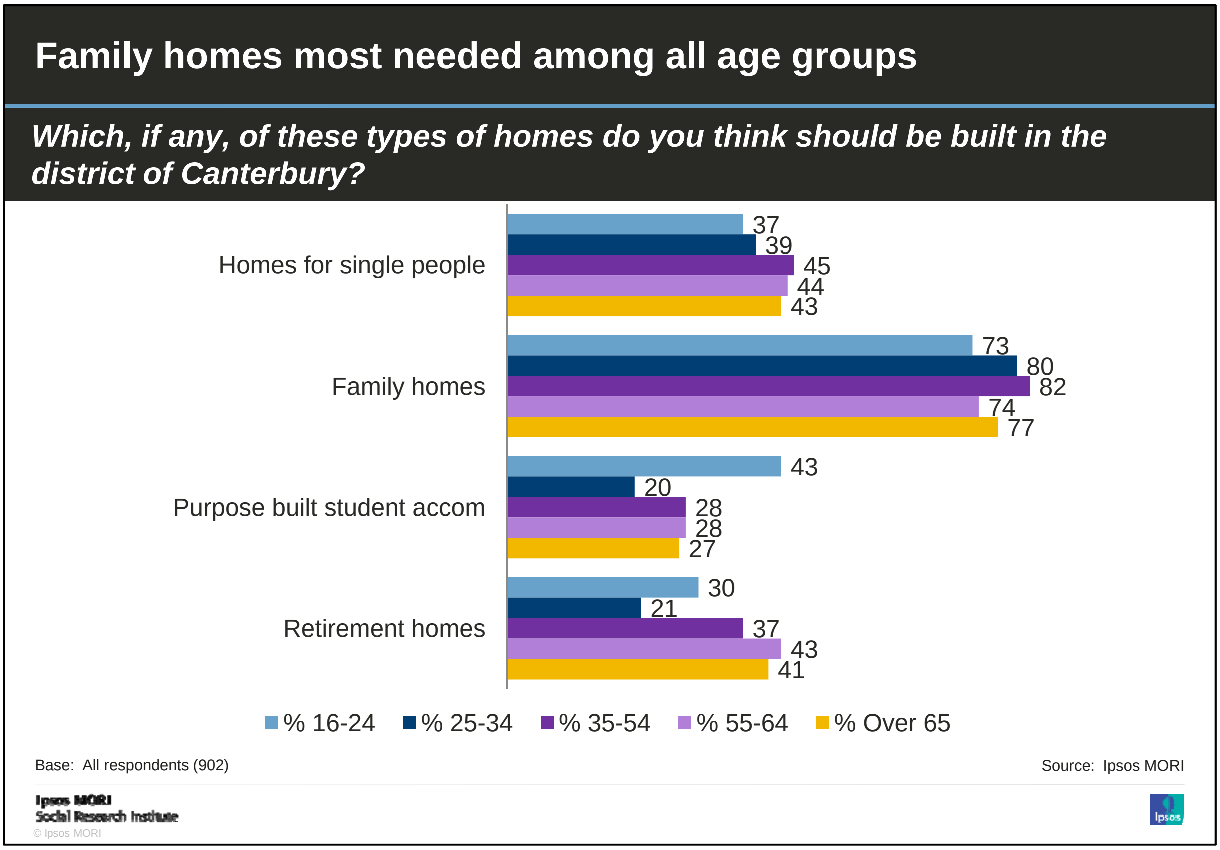
Job growth is of more concern to younger residents, tenants and those living in Whitstable. Those who support options C and D are most likely to have mentioned this as their key factor.

Building on greenfield land is of more concern to owner occupiers and those who have lived in the area for more than ten years. Those who support options A and B are most likely to have mentioned this as their key factor.

2.12 Preference for family homes

Although residents were asked to make a decision with regard to **how much** future development Canterbury should see, based on some information, it was acknowledged in the survey that there would be other issues affecting attitudes to the building of new homes. Canterbury City Council would want to consult with residents about these issues at a future stage of developing the development strategy. However, residents were asked questions regarding **what sort of houses** they felt were necessary for the area and **where** they felt the houses should be built (see section 2.13) based on their chosen development option.

Almost four fifths (78%) of residents feel that the Canterbury District needs more family homes, with around two fifths (42%) saying more homes for single people should be built. Around a third (35%) would like to see more retirement accommodation and a similar proportion (30%) more purpose-built student accommodation.



Unsurprisingly, younger respondents (16-24) and students are more likely than the district as a whole to say that they would like to see more purpose-built student accommodation, while those over the age of 55 are most likely to say that they would like to see an increase in the number of retirement properties, compared to the total. Those living in Herne Bay are also keen to see an increase in the number of retirement properties, which is interesting as Whitstable and rural areas of the district are currently the areas in which those who are retired are most likely to live.

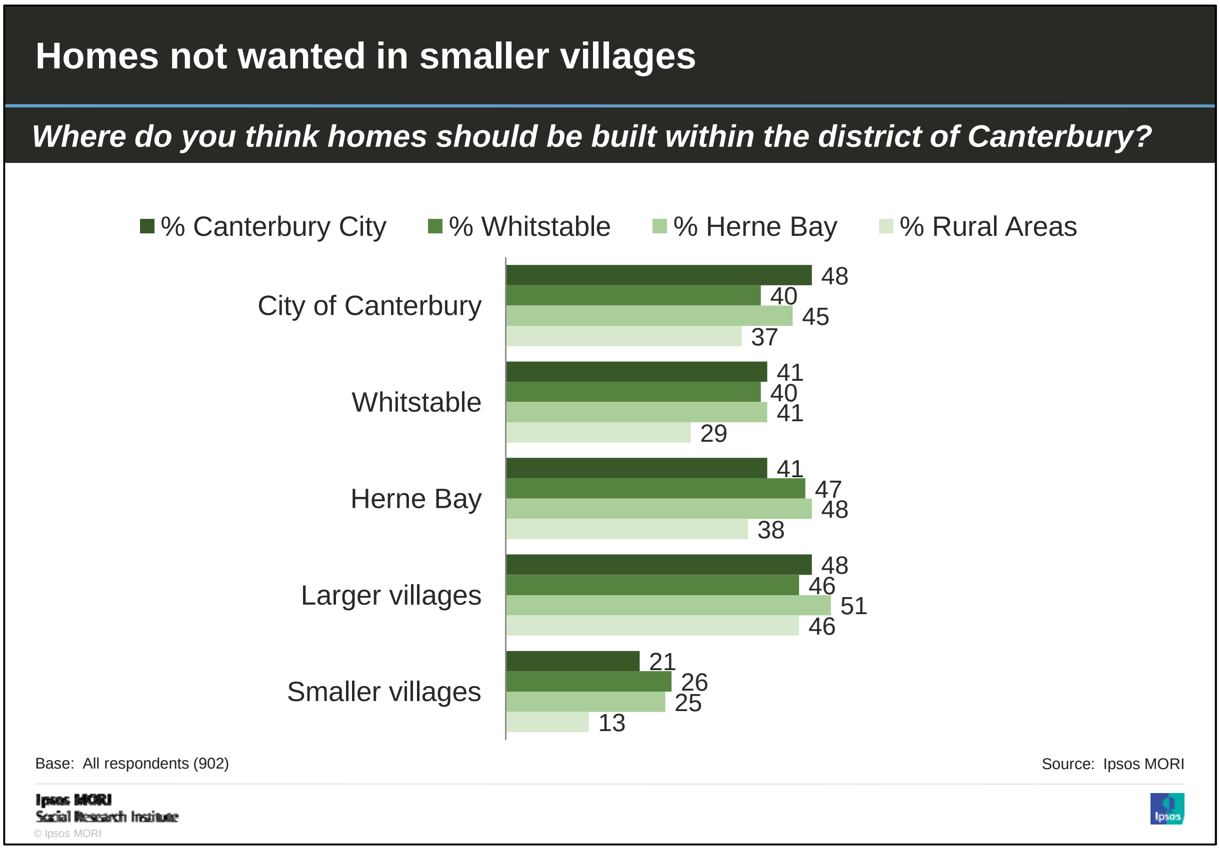
Those living in the City of Canterbury are most likely to say that they would like to see more purpose-built student accommodation. While this is likely to be partly driven by the student population being largely located within the city centre, there is also a desire from other city centre residents to see students provided with purpose-built housing.

Social renters are most likely to want to see more family homes, whereas private renters (a sizeable proportion of which are students) are most likely to want to see purpose-built student accommodation and owner-occupiers are most likely to say retirement homes are needed.

Residents who support development in the district in general are most likely to say that they support homes for single people and homes for families, as are those who support option C among the proposed development plans.

2.13 Preference for building across the district

With regard to the location of any new development, there is a similar level of support for building in the city of Canterbury and all of the larger towns and villages in the district. Around half (48%) say that they would like to see larger villages, such as Blean, Barham, Bridge, Chartham, Hersden, Littlebourne and Sturry developed. Two fifths of residents would like to see any new houses built in the city of Canterbury (43%), Herne Bay (43%) or in Whitstable (39%). There was less support for increasing the population in smaller villages, with a fifth (22%) feeling that this would be a suitable location.



There are few demographic differences between those who would like homes built in the different areas. Notably there is no significant difference between those who live in different areas of the district as to where they would like to see future houses built, regardless of the gap in support between those who would like to see homes built in the district but would not like to see them in their local area. Those who have lived in the area for more than ten years are most likely to say they would like to see Herne Bay, Whitstable and smaller villages developed further.

Social grades ABC1 (managers, administrators, professionals) would prefer to see development in Herne Bay compared to C2DEs (skilled/unskilled manual occupations/reliant on state benefit), as would social renters. This is interesting as Herne Bay does not currently have a particularly high proportion of C2DEs or social renters, therefore this appears to have been identified as a need rather than based on residents wanting to keep development away from the area in which they are living.

Those respondents who see housing as a priority are most likely to say they would like to see building across all areas of the district, while those who see employment as a priority are more likely than those who do not to want to see future development in Whitstable.

Residents choosing option B, maintaining the same pace of development, are most likely to say that they would like to see this development focussed on Herne Bay and the larger villages.

There are few demographic differences between those who would like to see more building in the future and those who would like to see less. The drive for an increase in development appears to be closely linked with socio-economic factors, with social grade C2DE and those living in social rented accommodation more likely to support this course of action. Those who select job growth and housing as the key factor in choosing a development plan are also most likely to support a development increase.

2.14 Profiling development preferences

To conclude this chapter, and as a precursor to the subsequent one which profiles opinion by demographic and other variables, we use tables to show the key differences between supporters and opponents of development *in principle*, and the responses to other questions given by those choosing the four development options. Such analysis builds on that provided in section 2.6 above.

Table 4 shows that in principle supporters remain supportive if building provides affordable homes (90% support), means that young families could stay and helps to create new jobs. Support falls when the prospect of demands on public services is raised but, much more significantly if development leads to congestion and increased traffic, and building on greenfield.

The smaller number of opponents to building in principle (24% of residents), are similarly affected by possible benefits. Most remain opposed to building whatever the potential benefits, but a significant proportion – 45% – swing towards support when presented with the prospect of building meaning that young people and families could stay.

Table 7: % support for each '…if…' statement among those initially supporting and opposing building new homes in the district in principle

	Supporters	Neither/nor	Opponents
…it meant that enough affordable homes were provided for local residents	90	64	36
…it increases the demands on public services	64	23	12
…it meant that young people and families could stay	93	63	45
…it meant building on 'greenfield'	27	8	2
…it helped to create jobs by attracting people and businesses to the area	84	58	34
…it meant an increase in traffic and congestion	34	8	2
Base: all	*524 (59%)*	*169 (19%)*	*202 (23%)*

Source: Ipsos MORI for CCC

Table 8 below shows that both supporters and opponents are firmly of the view that there are <u>not</u> plenty of employment opportunities in the area for the current population. Both groups are almost identical in their view that new homes should not be built unless new infrastructure such as roads and bus routes are provided. The two issues which separate supporters and opponents most are that the former are much more likely to think new housing developments would help to improve the local economy and that this will secure better facilities and amenities.

Table 8: % agree with each statement among those initially supporting and opposing building new homes in the district in principle

	Supporters	Opponents
There is enough housing in the district for people to live in decent homes they can afford	24	49
New housing developments would help to improve the local economy	60	21
New homes should not be built unless new infrastructure such as roads and bus routes are provided	88	91
Building more homes will bring more and better facilities and amenities to this area	49	13
There are plenty of employment opportunities in this area for the current population	14	11
Base: all	*524 (59%)*	*202 (24%)*
Source: Ipsos MORI for CCC		

Table 9 summarises the views, taken before their choice of option, of those favouring the different options. Such analysis is designed to supplement that in sections 2.9 to 2.11 commenting on residents own articulation of the reasons why they prefer the option they do. It shows that 47% of those backing Option D had earlier supported development, in principle, even if it meant building on greenfield. In addition, there is a steep rise across the table, from Option A (27%) to Option D (81%), in the proportions agreeing that new housing would help to improve the economy (54 percentage points from left to right) and the percentage supporting development if it helped to create jobs.

A similar proportion, 44%, of those preferring Option A had said earlier in the interview that they would support building if it helped create jobs but went on to back an option involving a likely "…significant reduction in the number of jobs." Similarly, two-thirds (67%) of those preferring Option B – "virtually no change in the number of jobs" – had earlier said they would support building if it helped to create jobs.

Table 9: Summary of opinions among those choosing each option

	Option A	Option B	Option C	Option D
% support building in principle (area)	23	39	66	74
% support building in principle (district)	29	58	73	89
% support …if enough affordable homes	50	72	90	92
% support …if increases demands on public services	26	41	57	67
% support …if young people and families could stay	56	79	89	90
% support …if building on 'greenfield'	8	12	25	47
% support…if helped to create jobs	44	67	84	90
% support…if an increase in traffic and congestion	10	17	31	43
% agreeing enough housing in the district	42	29	24	28
% agreeing new housing would help improve economy	27	38	63	81
% agreeing new homes not built without infrastructure	86	90	89	88
% agree building will bring more/better facilities	20	31	52	63
% agreeing plenty of employment opportunities	11	11	12	20
Base: all	*145 (16%)*	*289 (32%)*	*287 (31%)*	*75 (8%)*
Source: Ipsos MORI for CCC				

Options B and C were chosen by 62% of residents. As mentioned earlier, those backing Option B were most likely to say that greenfield was the key factor in helping them choose the option while those preferring Option C were most likely to identify the two growth-related factors. Based on their earlier responses, what separates out these two groups? As the table shows, those backing Option C were more likely to remain wedded to support in the face of the range of potential drawbacks and significantly more likely to agree that housing would help improve the economy (+25) and bring more/better facilities (+21). They were also stronger supporters of building in principle from the outset.

3. Disaggregation

3. Disaggregation

Chapter 2 of this report considers the main findings analysed by key attitudinal and demographic groups. In this chapter we look to disaggregate the data in order to provide a profile of responses in key demographic groups. We will present the key findings for each of the four areas as well as analysed by different age groups, different tenure groups and social grade. This chapter also provides an in-depth analysis of the interviews carried out with university students in Canterbury. This group makes up a significant proportion of the population of the district and has very distinct views on the potential future of the area.

The analysis of demographic groups in this chapter is intended to highlight the statistically significant differences between the groups. Where there are interesting similarities between groups, these are highlighted in Chapter 2 of this report.

3.1 Differences by area

Context

Demographic differences have a significant influence on views on future development. In order to look at differences across area it is, therefore, also important to look at the demographic context of each in order to have a clearer picture about whether area is the key driver rather than demographics. Although the general public data was weighted to make it representative of the Canterbury population as a whole, data was weighted at an aggregate level and not within area. This section looks at the profile of the four areas defined in the survey: Canterbury City, Whitstable, Herne Bay and the rural areas.

- **Canterbury City** is significantly more likely to have younger residents (aged 16-24) and they are significantly more likely to be students at college or at university. Renting from a private landlord is relatively much more usual in Canterbury City than across the district as a whole, and owning outright is less likely. Similarly, City residents are much more likely to live in flats and significantly less likely to live in bungalows. Canterbury City residents are the least likely to have children living at home, and in general have less attachment to the area, having lived there for a shorter amount of time.

- Those living in **Whitstable** are in general older (25+), with more than half having lived in the area for over 20 years or all of their lives and, thus, are more likely that the rest of the district to be retired. In general, Whitstable is the least affluent part of the district, with over half of the population being social grade C2DE, although the high number of retirees living in this area will also impact on the level of the social grading[5]. Bungalows are relatively more common in Whitstable than anywhere else across the district, and residents are more likely to own their property outright or rent from the council.

- Residents of **Herne Bay** are more likely than the district as a whole to have lived there for more than 20 years or all of their lives, but rather than being retired, residents are more likely to be working full-time than those in the rest of the district. Residents are most likely to be buying on mortgage with around nine in ten living in houses, and, relative to the district as a whole, a higher proportion have children living at home.

- The **rural areas** of the district have significantly more retired residents than the district as a whole, with a higher than average number of part-time workers. A fifth are aged 70+ and half have lived in the area for more than 20 years or all of their lives. Despite the high number of retirees, the rural areas are the most affluent in the district, with almost three quarters of residents ABC1s. Related to this, over half own their homes outright.

Current perceptions of Canterbury

Satisfaction with the local area is highest in rural areas (96% compared to 92% overall and 88% in Whitstable). The key issues in making somewhere a good place to live differ by area, with health services and care for the elderly of more relative importance in rural areas (with a higher proportion of older residents) and education services and opportunities to learn, arts and cultural activities and job opportunities and high level of employment all higher than average in Canterbury City. Those in Whitstable feel that better town centres and care for the elderly are more important than the district as a whole, and those in Herne Bay feel that public roads and transport and the countryside and the natural environment have more sway in making an area a better place to live.

The things that particular districts feel need improving in an area generally reflect their concerns about what is important. Those in Canterbury City would like to see more arts and cultural activities, whilst care for the elderly is a relative priority for improvement in rural

[5] Those reliant on state pension are automatically classified as social grade E. While private pensions are taken into account, savings are not.

areas. Those living in Herne Bay have no above-average concerns for improvement in the local area, while residents of Whitstable are more likely than the rest of the district to mention better town centres, care for the elderly, education services and opportunities to learn, facilities for young people, health services, job opportunities and high levels of employment and public safety. This long list of factors in which a relatively high proportion of Whitstable residents feel that improvement is required is clearly linked to the fact that, although still high, satisfaction is lower in Whitstable than elsewhere across the district.

In terms of council priorities, tackling disadvantage is more likely to be mentioned by residents in Canterbury City, facilities for young people by those in rural areas and keeping the district a safe place to live by those in Whitstable.

Though housing provision in Canterbury district is not seen to be a top-ranked priority for improvement in *any* area, those in Whitstable are significantly more likely to agree that there is enough housing in the district for people to live in decent homes they can afford. Whitstable's residents are also most likely to say they strongly agree with this statement (21% compared to nine percent of the total). They are also more likely to strongly disagree new housing developments would help to improve the local economy, and more likely to express agreement that new housing developments should not be built unless new infrastructure such as roads and buses are provided.

Despite the relative feeling in Whitstable that housing is not a significant issue, employment is seen to be important in this area. Residents are most likely to disagree that there are plenty of employment opportunities and more likely to agree that more should be done to help businesses set up in the district. Those living in Canterbury or in rural areas of the district are the most likely to say that they would be willing to move out of the district in order to take a better job.

Housing development in principle

Chiming with the relative lack of significance given to the issue of housing in Whitstable, residents there are also most likely to oppose future development in principle in their local area (41% compared to 35% of the total) and in the district (35% compared to 22% of the total). Those living in Canterbury City are most likely to offer their support, with over half (53%) supporting in principle development in the local area and two thirds (65%) in the district as a whole (compared to 46% and 58% respectively in total).

These area differences continue throughout the conditional statements, with those living in Canterbury most likely to support future development if it meant enough affordable homes were provided and those living in Whitstable most likely to oppose. Similarly, increased demands on public services is less likely to bother those in Canterbury City, who are still the area most likely to support, with those in Whitstable the most likely to voice opposition. However, increase in demand on public services is also an important factor for those living in rural areas, with almost half of these residents saying that they would oppose future development in this case, a significant increase on opposition among all residents. Traffic and congestion is the key issue in Herne Bay, with opposition highest among residents of this area if building new homes would increase traffic and congestion.

Interestingly, building on greenfield is less likely to affect support for future development among Whitstable residents, with almost a quarter (23%) supporting development despite this condition, compared to under a fifth (18%) of district residents in total.

Choosing a development plan

With some information about the current level of development in the district, views on whether more or less development should be allowed are spread evenly across the four areas. Those in Herne Bay are the most likely to say that they would like to see no change in the level of development in the future.

When presented with the four option cards for future development, option selection mirrored responses to the previous question. Herne Bay residents are relatively more likely to pick option B (continuing development at a similar level) than those across the whole district (39% compared to 32% overall) and other options show no significant difference across the regions.

Reasons for option selection are largely not dependent on region, however those in Herne Bay are significantly more worried about greenfield impact (14% compared to eight percent of the total) and those living in rural areas are most likely to feel that building new homes will not create new jobs (12% compared to six percent of the total).

Those living in Canterbury City, who are more likely to say that they would prefer a higher development option, are also more likely to express concerns about their chosen option with regard to building on greenfield land (28% compared to 21% of the total).

Those living in Whitstable are more likely than those in the district as a whole to say that they would not pick any of the available options (15% compared to nine percent of the total). This group is significantly more likely than the rest of the District to say that they did not pick an option as they do not feel that the infrastructure can support further development. This reflects the relative lack of satisfaction seen among Whitstable residents for the current level of service provision, as discussed earlier in this section.

The main factors for making an option decision are similar across all areas, although those in Whitstable are relatively concerned about job growth (40% compared to 34% of the total) and residents of Herne Bay see the amount of building on greenfield as the most important issue affecting their decision relative to the total District population (37% compared to 30% respectively).

Residents of Canterbury City are most likely to want to see purpose built-student accommodation whereas those living in Herne Bay are more likely than the rest of the district to want to see retirement homes built in the future.

3.2 Differences among key demographic groups

Tenure

This section considers some of the key differences between private and social tenants and owner occupiers. The tenure held by residents has an impact on the way they view development – it would appear that those who are still actively involved with the housing market (looking to buy a property or engaged with the rental market) are more likely to see a need for further development. Whether this is a perceived need due to experience with the local housing market, or whether this is an impression generated by housing being a more 'top of mind' issue for this group is difficult to untangle. However, it remains the case that residents who are hoping to purchase a property in the future, are also the most likely to benefit from any increased development in the area.

Current perceptions of Canterbury

- Dissatisfaction with the area in which they live is highest among social tenants (nine percent compared to five percent overall), however satisfaction is still high across the board.
- Tenants, both social and private, are relatively more likely to consider the amount and quality of housing important in making somewhere a good place to live (both 27% compared to 18% overall), however social tenants are more likely than the total to

consider this one of the top priorities for improvement in the area (25% compared to 14% overall).

- Social and private tenants are more likely than owner occupiers to feel that new housing developments would improve the local economy (60% and 62% compared to 41%), and that building more homes will result in more and better facilities and amenities in the area (58% and 54% compared to 31%). Owner occupiers are more likely than the district as a whole to agree that new homes should not be built without new infrastructure being provided (92% compared to 89%).

- Two thirds (63%) of private tenants say that they would move out of the district in order to take a better job, compared to two fifths (41%) of social tenants and a third (32%) of owner occupiers. Social renters are the more likely than the district as a whole to feel that more should be done in order to help businesses set up in the area (93% compared to 85% in total).

Housing development in principle

- Both social and private renters are more likely than owner occupiers to support building in the future both in their local area (58% and 69% compared to 40% respectively) and in the district as a whole (69% and 68% compared to 55% respectively). Interestingly, private renters are the only group who have a similar level of support for local area building and for building in the district as a whole.

- Across the conditional statements, social and private tenants are more likely than owner occupiers to support development in the district, with the exception of building on greenfield land. Here social renters are more likely than the district as a whole to support future development (31% compared to 18% in total) whereas private tenants are no more likely than the district overall to agree with building if it is to be on greenfield land.

Choosing a development plan

- With some information about the current level of development in the district, views on whether more or less development should be allowed follow a similar pattern to ‘in principle’ agreement. Social renters are the most likely to say they want to see more development than in the past (45% compared to 26% overall) and owner occupiers most likely to say they want to see less development (31% compared to 27% overall).

- These views are consistent in terms of development plan option selection where owner occupiers are most likely to select option A (18% compared to 16% overall) and option B (35% compared to 32% overall) while over half (56%) of private tenants would prefer to see option C, compared to 31% of the district overall.

- The need for affordable housing is a relative concern for social tenants in choosing their preferred development plan, whereas jobs and employment opportunities and supporting an increase in population are more important reasons for private tenants than for the district as a whole. Owner occupiers are more likely than the district overall to base their option choice on concerns about infrastructure and facilities.

- Greenfield concern is a relatively important concern for private tenants with regard to their chosen option, while owner occupiers are more likely to say they would be concerned about infrastructure, facilities and amenities, despite the fact that they are also more likely to pick their option based on the one which would have least impact on these areas.

- The most important factor in making a decision on the option chosen is the amount of building on greenfield for owner occupiers, and the amount of job growth for social and private tenants.

- Social renters are more likely than the rest of the district to say that they would like to see more family homes built, owner occupiers more likely to mention retirement homes and private tenants purpose-built student accommodation – whether this is due to the number of students in private rented accommodation or because of the competition for private rented accommodation between students and non-students is unclear.

- Private tenants are more likely than the rest of the district to want to see new homes built in the city of Canterbury, while social tenants are more likely to want to see home building in Herne Bay.

Social grade

Social grade is derived from the occupation, role and responsibilities of the Chief Income Earner in the respondents' household. It can be used as a useful proxy for income as well as occupation. A full summary of social grade definitions can been found in Appendix B of this report.

Current perceptions of Canterbury

- As is often found across local residents research, ABC1s are more likely than C2DEs to say that they are satisfied with their local area (95% compared to 87% respectively).

- C2DE respondents are most likely to see better town centres and care for the elderly as important in making somewhere a good place to live, whereas the countryside and the natural environment is of relative importance to ABC1s.

- In terms of improvements to the local area, C2DEs are more likely than their more affluent counterparts to want to see arts and cultural activities, town centres, education services, play areas, parks and public spaces and public safety prioritised. When choosing policy priorities for the council C2DEs are more likely than ABC1s to prefer a focus on keeping the district a safe place to live, while ABC1s are more likely to mention supporting excellent and diverse cultural activities.

- C2DE residents are more likely to agree that new housing developments would help to improve the local economy (53% compared to 43% ABC1s), and that building more homes will bring more and better facilities and amenities to the area (47% compared to 32% of ABC1s).

- Employment is a relative issue for C2DEs with 77% disagreeing that there are enough employment opportunities in the area (compared to 65% of ABC1s) and 91% feeling more should be done to encourage new businesses to set up in the area (compared to 82% of ABC1s). However ABC1s are more likely than their counterparts to agree that more should be done to encourage students to stay in the area (57% compared to 49%).

Housing development in principle

- There is no significant difference in support or opposition in principle to building in the local area across social grades, although C2DE residents are more likely than ABC1s to support building in the district as a whole (63% compared to 56% respectively).

- C2DEs are more likely than ABC1s to support development in principle if it helps to create jobs by attracting people and businesses (73% compared to 65%) and even if it increases the demands on public services (50% compared to 41%).

Choosing a development plan

- With some information about the current level of development in the district, views on whether more or less development should be allowed follow a similar pattern to 'in principle' agreement. A third (30%) of C2DEs would support more building than in the past compared to a quarter (23%) of ABC1s.

- Option selection for a future development plan differs little across the social grades, with the only significant difference between the two groups being the relative preference of C2DE residents for option D (11% compared to seven percent of ABC1s).

- Of the nine percent of ABC1 residents who say they would not pick any of the options presented, almost a third (31%) say that there is nothing that they like about any of the options presented, compared to 12% of C2DEs.

- The amount of job growth was the only relative difference in opinion between the different social grades when discussing the most important factors behind making their decision, with almost two fifths (39%) of C2DEs mentioning this as the number one factor compared to just under a third (31%) of ABC1s.

- ABC1s are more likely than their less affluent counterparts to say that they would like to see purpose built student accommodation (36% compared to 21%) and that they would like to see new homes built in the Herne Bay area (46% compared to 39%).

Age

This section considers the differing views of development among different age groups. Although an important variable, age is also a useful proxy for lifestage, and as such is interlinked with many of the other variables considered in this section, such as tenure, working status and area. Therefore it is important to remember that these views may not simply be age specific, but may also be connected to the general demographic of a younger or older population.

Current perceptions of Canterbury

- Services of importance to residents differ according to age, with those over 55 more likely than the district as a whole to say that care for the elderly, health services and public transport are key for them, while job opportunities and leisure facilities are of relative importance to 16-24 year olds. Those aged 25-34 (and therefore those most likely to have young children) are more likely than the total to mention play areas, parks and open spaces as important, and those in the 35-54 age bracket are most likely to cite education services and facilities for young people, as well as job opportunities.

- This is largely reflective of the areas in which residents feel that improvement is needed, with those aged 55-64 being relatively more likely to say public transport and the countryside are in need of improvement, with all of those aged over 55 more likely to cite care for the elderly. 35-54 year olds are more likely than the district as a whole to mention play areas and public spaces as in need of improvement and this group is also more likely than residents overall to feel that an improvement in the amount and quality of affordable housing is needed. Residents aged 25-34 years old are most likely to mention leisure facilities.

- In terms of identifying council priorities, while tackling traffic congestion is the key priority mentioned overall, this is most frequently mentioned by those aged over 65, with those aged 55-64 most likely to mention encouraging greater involvement for local people, and younger residents (16-24) most likely to say the council should be supporting a broad range of sporting and fitness facilities and activities, both relative to the population as a whole. Those aged 25-34 are more likely to mention supporting facilities and activities for children and young people than the district overall and older residents (55+) more likely to mention planning for the right type and number of homes.

- Older residents (55-64) are more likely than the district as a whole to disagree that there is currently enough housing in the district for people to live in decent homes they can afford (53% compared to 43% overall), with younger residents (16-25 most likely to agree that current housing need is sufficient (39% compared to 31% in total). However, younger residents (16-24) are the most likely to agree that new housing developments would help to improve the local economy (55% compared to 46% overall), with those aged 55-64 most likely to disagree that this would be the case (39% compared to 32% in total).

- Similarly, younger residents (those aged 16-25) are most likely to feel that building more homes will bring more and better facilities to the area (57% compared to 37% overall), whereas all those aged over 35 are more likely than those aged under to disagree that this is the case. Although agreement in general is high that new homes should not be built without new infrastructure in place, those aged over 65 are even more likely to agree that this is the case (93% compared to 89% overall).

- There is general agreement that more should be done in order to help new businesses set up in the district, however those aged 55-64 are more likely than the population as a whole to disagree that this should be done (nine percent compared to four percent overall). As may be expected, given the higher proportion of students and prospective students among this group, those aged 16-24 are more likely to say that they would like more to be done in order to encourage university graduates to stay in the area when they finish studying (62%) and that they would be willing to move out of the area to take a better job (69%) compared to the district as a whole (54% and 38% respectively).

Housing development in principle

- Despite more recognition among older age groups for the need for more affordable housing in the district, younger residents (16-24) are more likely than those over 65 to support building in their local area (56% compared to 42% respectively), with those aged over 65 more likely than those aged 16-24 to oppose future development in their neighbourhood (43% compared to 23% respectively).

- Similarly, while there are no differences by age in those who support development in the district as a whole, residents aged over 55 are more likely than the district overall to say that they oppose district level development (30% of those aged 55-64 and 27% of those aged 65+ compared to 22% in total).

- This pattern of opposition and support continues throughout the conditional statements, with younger respondents being more likely to support development in the rest of the district if it meant that enough affordable housing were provided (85% v 73% overall), if demands on public services were increased (54% v 44% overall) and if it helped to create jobs by attracting businesses to the area (80% v 68% in total).

- Those residents aged 35-54 are more likely to oppose future development than the district as a whole if they perceive it will have any negative impact on the district, such as an increased demand on public services (43% v 37%) or an increase in traffic and congestion (70% v 65%), as well as in the case that enough affordable homes were provided for local residents (19% v 15%) and if it meant that young people and families were able to stay in the district (14% v 10%).

- Older residents were more likely than the district to oppose development if they felt it would increase the demands on public services (45% of 65+ v 37% overall) and if it would help create jobs by attracting people and businesses (31% of 55-64 year olds v 19% overall).

Choosing a development plan

- When given some information about the current level of development in the district, there is no significant difference between age groups about whether more, less or the same amount of homes should be built over the next twenty years.

- Similarly, there are few differences in option selection, with the exception of younger residents (those aged 16-24), who are more likely than all other age groups to select option C (49% compared to 29% of those aged 25-34 and 55-64 and 26% of those aged 35-54 and over 65).

- Younger residents are significantly more likely that other age groups to cite employment opportunities as the main driver in making their decision (41% compared to 27% overall). A feeling that building more houses would not create more jobs and concerns about the infrastructure are relatively highly stressed by those aged 25-54 (10% and eight percent respectively compared to six percent of the total).

- While a relative concern of younger residents is the development on greenfield sites (27% compared to 21% overall), infrastructure is more likely to be a concern for those aged over 55 compared to the district as a whole.

- The amount of job growth is the key factor in decision making for 16-24 year olds, with over half (52%) citing this compared to a third (34%) of the district as a whole. A quarter (25%) of those aged 55-64 say that the amount of housing is the most important factor, compared to 17% of the population in total.

- As may be expected, those aged 16-25 are more likely than the district population to say that purpose-built student accommodation is needed (43% v 30%) while older residents are more likely to mention retirement homes (41% of those 55+ v 35% overall).

3.3 Students in Canterbury

To supplement the survey of residents, additional interviews were carried out with students living in university accommodation. 100 interviews were completed with students at the Universities of Kent and Christchurch. No quotas were set and the data was not weighted as there is no official, validated profile data for this population.

These interviews were carried out using a face-to-face interview approach with the same questionnaire as for the general public survey, with some additional student-specific questions, however, with the permission of the universities involved, students were selected on a free-find basis from sample points covering only university accommodation within the Canterbury district. As the selection methodology was so different for this group these students have not been analysed along with the general public data. Results are presented separately in this section of the report. Direct comparisons are not made with the general public survey due to the differences in survey methodology and the absence of weighting from the student sample.

Some students living in non-university off campus accommodation were selected and interviewed as part of the general public survey. This group has been analysed within the general public survey. However the 65 students living off campus have also been included in analysis for this section, in order to provide a rounded analysis of students across all years of study, living both in university accommodation and in off-campus, usually privately rented, accommodation.

Current perceptions of Canterbury

Student satisfaction with the area is high (95%), with a similar proportion (94%) of students saying that the area is a good place to live. Less than one in ten (eight percent) feel that Canterbury district is a bad place to be a student, with three quarters (75%) agreeing that it is a good place to spend an evening out. However, two fifths (39%) agree that the district is a bad place for a graduate to get a graduate job, with only a quarter (24%) disagreeing that this is the case.

Perhaps due to this, only a third of students (32%) say that they are likely to be living in Canterbury district in five years time, with even fewer (29%) thinking it likely they will be working in the district at this point. This is in contrast to the two thirds (65%) of students who say that they would be interested in living in the district in five years time and over half (56%) who would be interested in working locally.

Public safety, public roads and transport and education services are the top three important factors mentioned in terms of making somewhere a good place to live (60%, 47% and 38% respectively), with job opportunities (27%) and public roads and transport (24%) being the top two areas identified for improvement in the district. Interestingly the amount and quality of housing available is the third ranked priority for improvement in the district, mentioned by almost a quarter (22%) of students.

Similarly, half (50%) of students identify keeping the district a safe place to live as a top council priority, with two fifths (44%) mentioning supporting the growth of the local economy and a third (33%) tackling congestion and improving the condition of roads and pavements. Housing is the fourth top mention, with a quarter (23%) saying that the council should be planning for the right type and number of homes in the right places.

Students are split over whether there are currently enough homes in Canterbury for people to live in decent homes they can afford, with 38% agreeing that this is the case and 30% saying that they do not believe this is true. Two thirds (65%) of students feel that new housing developments would help the local economy, with a similar proportion (63%) agreeing that more homes will bring more and better facilities and amenities to the area. However, four fifths (78%) of students agree that new homes should not be built unless new infrastructure is provided to service them.

The availability of employment is a key issue for students living in the district, and only a quarter (24%) think that there are plenty of employment opportunities in the area for the current population, with even fewer (16%) agreeing that there are plenty of employment opportunities for graduates. Given the more mobile nature of the student population, it is no surprise that four fifths (79%) say they would be prepared to move out of the district to take a better job, although a similar proportion (77%) would like to see more done to help businesses set up in the area (although 55% think Canterbury is a good place to set up a business already), and two thirds (69%) think more should be done to encourage university graduates to stay. Despite the lack of local employment opportunities, over half (58%) of students say that they would be happy living in Canterbury and commuting to a job elsewhere.

Housing development in principle

Interestingly, around seven in ten (72%) of students support the ‘in principle’ development of new homes in their local area, around two thirds (63%) support future development in the district as a whole. This suggests that students are more likely to see future development as something that would be of direct benefit to themselves.

In principle support for future development is highest if it means that young people and families can stay in the district (86%), if enough affordable homes are available for residents and if it helps to create jobs by attracting people and businesses to the area (both 84%). Support for development falls to three fifths (58%) of students if this would increase the demands on public services, however net support remains at +40%. Only a quarter of students support development where it would involve building on greenfield (22%) or an increase in traffic and congestion (24%) and in both of these cases opposition to development is greater than support (-35% net support and -33% net support respectively).

Choosing a development plan

With some information about the current level of development in the district, a third (32%) of students would like to see more development than in the past, with a fifth (21%) wanting to see less; two fifths (40%) would like development to continue at the same pace as over the last ten years.

Students have a clear preference for option C, with over half (53%) choosing this option. Despite most wanting to see the current pace of development maintained before being presented with potential development plans, only a fifth (19%) express a preference for option B, with around one in ten choosing option D (13%) and option A (10%).

The support for option C is explained by the prominence of jobs and job growth, both as a spontaneously mentioned reason for choosing their option (43%) and as the top factor in making a decision (52%). Other key reasons given are support for an increase in the population (15%) and the need for affordable housing.

The key concern with the option chosen is the impact on greenfield land, mentioned by 36% of students. Just under a fifth (18%) of students say they have no concerns with their chosen option.

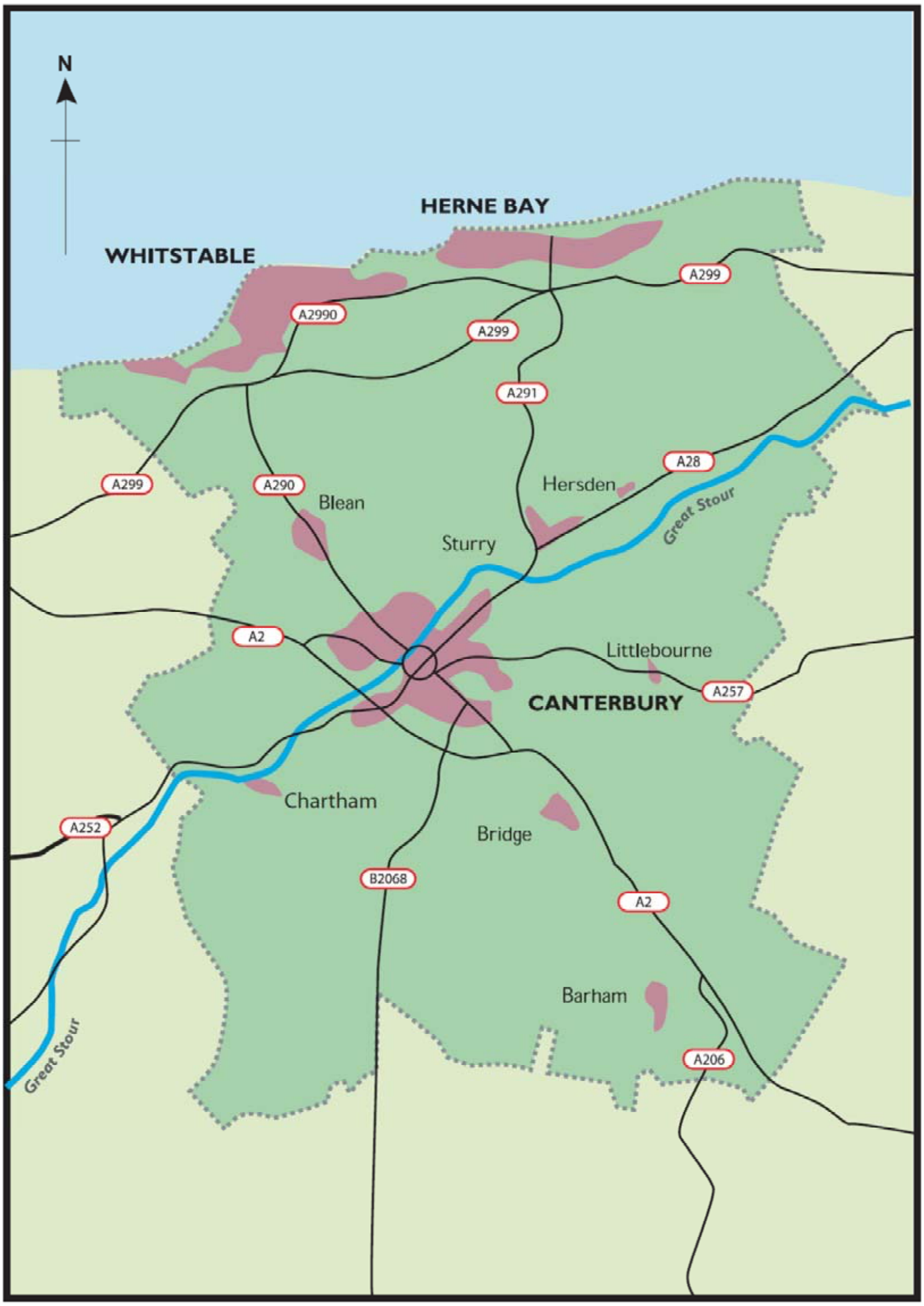
Although almost two thirds (63%) of students feel that purpose-built student accommodation should feature in any future development, seven in ten (70%) say that more family homes are needed. A third (34%) would like to see homes for single people and just under a quarter (22%) more retirement homes. Students are most keen to see development in the City of Canterbury (57%) and in larger villages (45%), with a quarter feeling that development in

Herne Bay (25%) and Whitstable (27%) would be appropriate. Around one in ten (13%) feel that smaller villages would be the ideal locations for future development.

Appendices

Appendices

Appendix A: Map of Canterbury District



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Appendix B: Social Grade definitions

Social grade is derived from the occupation, role and responsibilities of the Chief Income Earner in the respondents' household. It can be used as a useful proxy for income as well as occupation. Listed below is a summary of the social grade definitions on all surveys carried out by Ipsos MORI. These are based on classifications used by the Institute of Practitioners in Advertising.

A Professionals such as doctors, surgeons, solicitors or dentists; chartered people like architects; fully qualified people with a large degree of responsibility such as senior editors, senior civil servants, town clerks, senior business executives and managers, and high ranking grades of the Services.

B People with very responsible jobs such as university lecturers, hospital matrons, heads of local government departments, middle management in business, qualified scientists, bank managers, police inspectors, and upper grades of the Services.

C1 All others doing non-manual jobs; nurses, technicians, pharmacists, salesmen, publicans, people in clerical positions, police sergeants/constables, and middle ranks of the Services.

C2 Skilled manual workers/craftsmen who have served apprenticeships; foremen, manual workers with special qualifications such as long distance lorry drivers, security officers, and lower grades of Services.

D Semi-skilled and unskilled manual workers, including labourers and mates of occupations in the C2 grade and people serving apprenticeships; machine minders, farm labourers, bus and railway conductors, laboratory assistants, postmen, door-to-door and van salesmen.

E Those on lowest levels of subsistence including pensioners, casual workers, and others with minimum levels of income

When we discuss the differences in social grade in this chapter we will split respondents into those in grades ABC1 and those in grades C2DE.

Appendix C: Guide to statistical reliability

The residents who took part in the survey are only a sample of the total "population" of residents in Canterbury District, so we cannot be certain that the figures obtained are exactly those that would have been reached were everyone had responded (the "true" values). We can, however, predict the variation between the sample results and the "true" values from knowledge of the size of the samples on which the results to each question is based, and the number of times a particular answer is given. The confidence with which we can make this prediction is usually chosen to be 95% - that is, the chances are 95 in 100 that the "true" value will fall within a specified range. The following illustrates the predicted ranges for different sample sizes and percentage results at the "95% confidence interval":

Size of sample on which survey result is based	Approximate sampling tolerances applicable to percentages at or near these levels		
	10% or 90%	30% or 70%	50%
	±	±	±
100 responses	6	9	10
200 responses	4	6	7
500 responses	3	4	4
902 responses	**2**	**3**	**3**
1,000 responses	2	3	3

For example, with a sample size of 902 where 30% give a particular answer, the chances are, 19 in 20 that the "true" value (i.e. the one which would have been obtained if the whole population had been interviewed) will fall within the range of ±3 percentage points from the survey result (i.e. between 27% and 33%).

When results are compared between separate groups within a sample (e.g. males versus females), different results may be obtained. The difference may be "real," or it may occur by chance (because not everyone in the population has been interviewed). To test if the difference is a real one - i.e. if it is "statistically significant" - we again have to know the size of the samples, the percentage giving a certain answer and the degree of confidence chosen. If we once again assume a "95% confidence interval", the differences between the results of two separate groups must be greater than the values given in the following table:

Size of sample on which survey result is based	Differences required for significance at or near these percentage levels		
	10% or 90% ±	30% or 70% ±	50% ±
100 vs. 100	8	13	14
200 vs. 200	6	9	10
500 vs. 500	4	6	6
500 vs. 1,000	3	5	5

It is important to note that, strictly speaking, the above confidence interval calculations relate only to samples that have been selected using strict probability sampling methods. However, in practice it is reasonable to assume that these calculations provide a good indication of the confidence intervals relating to this survey and the sampling approach used.

Appendix D: Topline findings (residents)

Canterbury Future Development Survey 2011-12
Topline Summary

- On behalf of Canterbury City Council, Ipsos MORI conducted 902 interviews with residents of the district area aged 16+.
- An additional 100 interviews with students living on campus in the area (shown in a separate summary below).
- The sampling unit used for the survey among residents was a combination of two Census Output Areas. Quotas were set at this level – on age, gender and work status. Sampling was stratified to ensure a minimum 225 interviews in each of four areas: Canterbury City, Whitstable, Herne Bay and the rural areas.
- All fieldwork was undertaken between 12 December 2011 and 15 February 2012 using face-to-face, in-home interviewing.
- Questions were developed by Ipsos MORI. Where information (in addition to showcards) was provided to the respondent, this has been included in the appendices as indicated.
- At the analysis stage data was weighted by age, gender, working status, tenure and by area to reflect the known population profile.
- Where percentages do not sum to 100, this may be due to computer rounding, multiple responses or the exclusion of 'don't know' categories.
- * represents figures greater than 0 but less than 1.
- Questions are based on all respondents except where indicated.

AREA AND PRIORITIES

ASK ALL

Q4. SHOWCARD A (R) **How satisfied or dissatisfied are you with your local area as a place to live?** SINGLE CODE ONLY

	%
Very satisfied	53
Fairly satisfied	39
Neither satisfied nor dissatisfied	3
Fairly dissatisfied	3
Very dissatisfied	1
No opinion/Don't know	-

Q5. SHOWCARD B (R) **Thinking generally, which of the items on this list would you say are most important in making somewhere a good place to live? You can choose up to four. Please just read out the letters.** MULTICODE UP TO FOUR

Q6. **Which of the items on this list would you most like to see improved, to make this area a better place to live? Please mention as few or as many as you like. Again, just read out the letters.**

		Q5	Q6
		%	%
A	Arts and cultural activities	14	11
B	Amount and quality of housing	18	14
C	Better town centres	23	22
D	Care for the elderly	16	16
E	Education services and opportunities to learn	29	11
F	Facilities for children and young people	24	29
G	Health services	44	14
H	Job opportunities/high levels of employment	32	28
I	Leisure facilities	18	20
J	Play areas, parks and open spaces	23	21
K	Public safety/low crime levels	51	22
L	Public transport and roads	39	36
M	The countryside and the natural environment	40	9
	Other	*	2
	None of these	*	5
	Don't know	*	1

Q7. SHOWCARD C (R) **On this card is a list of things that Canterbury City Council has identified as priorities. Which two or three, if any, do you think it is most important for the Council to work towards?**

		%
A	Encouraging greater involvement for local people	13
B	Keeping the district a safe place to live	47
C	Making the district cleaner and greener	22
D	Planning for the right type and number of homes in the right places	27
E	Supporting excellent and diverse cultural facilities and activities for residents and visitors	6
F	Tackling disadvantage	13
G	Supporting a broad range of sporting and fitness facilities and activities	10
H	Supporting facilities and activities for children and young people	26
I	Supporting the growth of the local economy and the number of people in work	44
J	Tackling traffic congestion and improving the condition of roads and pavements	51
	Other	1
	None of these	*
	Don't know	*

HOUSING

I would now like to ask your views on some issues. It does not matter if you intend to stay in Canterbury or not, I am still interested in your views.

We'll start with building new homes and by that I mean different types of housing such as flats and houses, including homes built by private developers, housing associations and the Council.

Q8a. SHOWCARD D (R) **In principle, do you support or oppose the building of new homes in the future in your local area?**

	%
Strongly support	13
Tend to support	34
Neither support nor oppose	18
Tend to oppose	21
Strongly oppose	14
Don't know	1

Q8b. SHOWCARD D (R) AGAIN **In principle, do you support or oppose the building of new homes in the future in the district of Canterbury, by that I mean Canterbury as well as Herne Bay, Whitstable and the surrounding area as shown on this map?**

	%
Strongly support	15
Tend to support	44
Neither support nor oppose	19
Tend to oppose	14
Strongly oppose	8
Don't know	1

Q9. SHOWCARD D (R) AGAIN **In principle, do you support or oppose the building of new homes in the future in the district of Canterbury as a whole if…**

		Strongly support %	Tend to support %	Neither support nor oppose %	Tend to oppose %	Strongly oppose %	Don't know %
A	**…it meant that enough affordable homes were provided for local residents**	24	49	11	10	6	1
B	**…it increases the demands on public services**	6	38	18	24	13	1
C	**…it meant that young people and families could stay in the district**	26	50	13	7	3	1
D	**…it meant building on 'greenfield' i.e. land that is undeveloped**	3	14	12	31	39	1
E	**…it helped to create jobs by attracting people and businesses to the area**	21	47	12	12	7	*
F	**…it meant an increase in traffic and congestion**	4	18	13	35	31	*

Q10. SHOWCARD E (R) **Still thinking about the whole of the Canterbury district area, do you agree or disagree with the following statements…?**
READ OUT. SINGLE CODE ONLY

		Strongly agree %	Tend to agree %	Neither agree nor dis-agree %	Tend to disagree %	Strongly disagree %	Don't know %
A	**There is enough housing in the district of Canterbury for people to live in decent homes they can afford**	9	23	15	25	17	11
B	**New housing developments would help to improve the local economy**	9	38	18	23	9	4
C	**New homes should <u>not</u> be built unless new infrastructure such as roads and bus routes are provided**	58	31	5	4	1	*
D	**Building more homes will bring more and better facilities and amenities to this area**	8	30	20	28	13	2

OPTIONS

Q11. INFO SHOWCARD 1 (SEE APPENDIX 1)
SHOWCARD F (R) **Canterbury City Council has to make some important decisions about local development in the whole of the district and how many new homes <u>it allows</u> to be built for the next twenty years. Which, if any, of these best describes your view about how much house building the Council should encourage?**

		%
A	A lot more than in the past	7
B	A little more than in the past	18
C	About the same as in the past	39
D	A little less than in the past	18
E	A lot less than in the past	9
	It depends	4
	None of these	1
	Don't know	4

Q12. INFO SHOWCARD 2 (SEE APPENDIX 2)
Still thinking about the whole district of Canterbury, and taking your answer from this card, which of these options, if any, do you think the Council should choose.

	%
Option A **Delivery of 150 new homes per year**	16
Option B **Delivery of 550 new homes per year**	32
Option C **Delvery of 760 new homes per year**	31
Option D **Delivery of 1,140 new homes per year**	8
None of these options	9
Don't know	2

Q13a **What are your main reasons for choosing Option. . .?**

Base: All respondents who selected an option at Q12 *(796)*

(mentions above 2% shown)

	%
Support/positives	**52**
More jobs/job growth/employment opportunities	27
Homes/houses (affordable housing) are needed	17
Support for increase in population/more people/families/students	8
Growth/potential/steady/sustainable growth	5
Other options won't work/best option/least impact	4
Opposition/negatives	**36**
Overdevelopment/already enough homes/lack of space	11
Greenfield development/ environmental impact/spoiling the areas natural beauty	8
Overcrowding/densely populated/too many students	8
Building more houses won't create jobs/growth/improve the economy	6
Concerns about infrastructure/facilities/resources (schools/transport/roads/hospitals)	6
Neutral	**25**
This is about the right number of new homes/not too many new homes	15
Need to get the balance right/find the middle ground	4
Maintain status quo/consistency/continue to develop as currently	4
Other	2
Don't know/no answer/none/no reason	2

Q13b **And what, if any, are the main concerns you would have about Option. . . .?**

Base: All respondents who selected an option at Q12 *(796)*

(Top 5 mentions)

	%
Greenfield development/ environmental impact	21
Infrastructure/roads/schools/resources/ amenities/services etc	15
Jobs/employment/economic conditions	15
Overcrowding/traffic congestion/ growth in population	10
Overdevelopment/too many houses/ not enough space	7
No concerns/none	15
Don't know/No answer	12

Q13c **Although you have not chosen any of the options A to D, what, if any, aspects of these options do you like?**

Base: All respondents who did not select an option at Q12 *(106)*

	%
I like the idea of jobs/jobs for locals	16
I don't want to see Greenfield development	8
I don't think there will be enough jobs	7
I don't think the infrastructure can support the development	5
I don't want to see any further development	5
I like the idea of (gradual) population growth	4
I don't want to see an increase in population	3
I like the idea of more/new houses/homes for people	2
I don't agree with the estimates/figures quoted	1
Other	2
None/nothing/don't like anything	24
Don't know	8
No answer	23

Q14.1 SHOWCARD H (R) **The options we presented to you were based on four main factors. Which of the factors on this card were most important in helping you to choose Option…? Please rank them in importance, starting with the most important first.**

Most important

		%
A	The amount of building on greenfield	30
B	The amount of job growth	34
C	The amount of population growth	17
D	The amount of housing	17
	None of these	2
	Don't know	1

Q14.2 SHOWCARD H (R) **The options we presented to you were based on four main factors. Which of the factors on this card were most important in helping you to choose Option…?**

	Second most important *Base: All who didn't answer none of these/don't know previously*	*(875)* %
A	The amount of building on greenfield	18
B	The amount of job growth	20
C	The amount of population growth	27
D	The amount of housing	32
	None of these	3
	Don't know	-

Q14.3 SHOWCARD H (R) **The options we presented to you were based on four main factors. Which of the factors on this card were most important in helping you to choose Option…?**

	Third most important *Base: All who didn't answer none of these/don't know previously*	*(848)* %
A	The amount of building on greenfield	16
B	The amount of job growth	18
C	The amount of population growth	34
D	The amount of housing	26
	None of these	6
	Don't know	-

Q14.4 SHOWCARD H (R) **The options we presented to you were based on four main factors. Which of the factors on this card were most important in helping you to choose Option…?**

	Fourth most important *Base: All who didn't answer none of these/don't know previously*	*(798)* %
A	The amount of building on greenfield	33
B	The amount of job growth	24
C	The amount of population growth	18
D	The amount of housing	19
	None of these	6
	Don't know	-

Q15. SHOWCARD I (R) **Still thinking about Option…which, if any, of these types of home do you think should be built in the district of Canterbury? You can pick as many or as few as you like.** MULTICODE

		%
A	Homes for single people	42
B	Family homes	78
C	Purpose-built student accommodation	30
D	Retirement homes	35
E	Other	4
	Don't know	2
	No answer	4

Q16. SHOWCARD J (R) **And if Option… were chosen, where do you think homes should be built within the district of Canterbury? You can pick as many or as few as you like from this card.** MULTICODE

		%
A	The city of Canterbury	43
B	Whitstable	39
C	Herne Bay	43
D	Larger villages – Barham, Blean, Bridge, Chartham, Hersden, Littlebourne and Sturry	48
E	Smaller villages	22
F	Other	5
	It depends	4
	None of these	7
	Don't know	4

EMPLOYMENT

Q17. SHOWCARD K (R) **Thinking about what you know or have heard about employment in the district of Canterbury, to what extent do you agree or disagree with the following statements…?**

		Strongly agree %	Tend to agree %	Neither agree nor dis-agree %	Tend to disagree %	Strongly disagree %	Don't know
A	**There are plenty of employment opportunities in this area for the current population**	2	10	11	36	33	8
B	**I would be willing to move out of the district to take a better job**	16	22	15	14	27	5
C	**We should do more to help businesses to set up here**	45	40	9	3	1	2

Q19. **Can I just check, how long, in total, have you lived in this area?**
PROBE TO CODE BELOW. SINGLE CODE ONLY

	%
Under 3 months	1
3 months up to 1 year	4
1 year up to 2 years	6
2 years up to 3 years	6
3 years up to 5 years	5
5 years up to 10 years	13
10 years up to 20 years	19
Over 20 years/all my life	46
Don't know/can't remember	-

Q20. SHOWCARD L (R) **How likely or unlikely do you think it is that you will be doing the following in 5 year's time…?**

		Very likely %	Fairly likely %	Not very likely %	Not at all likely %	Don't know %
A	**Living in Canterbury**	54	16	10	18	2
B	**Working in a full/part-time job in Canterbury**	23	17	14	44	2

DEMOGRAPHICS

Q1. **Gender** SINGLE CODE ONLY

	Weighted %
Female	52
Male	48

Q2. **Working status of respondent**
SINGLE CODE ONLY

	%
Working - full time (30+ hrs)	32
Working - part-time (9-29 hrs)	11
Unemployed - seeking work	5
Unemployed - not seeking work	9
Not working (retired)	29
Student at university	9
Student at college	3
Other	1
Don't know	1

Q3. **Age**
SINGLE CODE ONLY

	Total %
16-24	21
25-34	14
35-44	13
45-54	16
55-59	5
60-64	8
65-69	9
70+	15

Q22. SHOWCARD N **You said earlier that you are in full-time/part-time work. Taking your answer from this card, where do you normally work?**
SINGLE CODE ONLY
Base: All who are in full or part-time work *(402)*

	Total %
Within the district of Canterbury	70
Outside the district, in Kent	18
In London	4
Elsewhere	5
It depends	3
Don’t know	-

Q23. **Social grade**

	%
A	5
B	24
C1	35
C2	22
D	10
E	4

Q24. **Which of these best describes the ownership of your home?**

	%
Owned outright (including leasehold)	42
Buying on mortgage	31
Rented from Council	8
Rented from housing association	3
Shared ownership (e.g. part buying, part renting)	*
Rented from private landlord	15
Other	1

Q25. **And which of these best describes your home?**

	%
House	82
Flat	8
Bungalow	9
Maisonette	*
Other	*

Q26. **Are there are any children under the age of 16 living here**? IF YES: **How many?**
SINGLE CODE ONLY

	Total %
No	70
1	14
2	11
3	4
4	1
5+	*

Q27. **How many adults aged 16 or over are living here including yourself?**
SINGLE CODE ONLY

	Total %
1	20
2	52
3	12
4	11
5	3
6+	2

Q28. **And can I just check, are there are any people aged 60 or more living here including yourself?** IF YES: **How many?**

	%
None	66
1	16
2	18
3	1
4+	*

Q29. **Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?** SINGLE CODE ONLY

	%
Yes	13
No	87
Refused	-

Q30. SHOWCARD P **Which of these best describes your ethnic group?**
SINGLE CODE ONLY

	%
White	**96**
English/Welsh/Scottish/Northern Irish/British	92
Irish	*
Gypsy or Irish traveller	*
Any other white background	3
Mixed/multiple ethnic groups	*****
White and Black Caribbean	*
White and Black African	-
White and Asian	*
Any other mixed/multiple ethnic background	*
Asian or Asian British	**2**
Indian	*
Pakistani	*
Bangladeshi	*
Chinese	1
Any other Asian background	1
Black/African/Caribbean/Black British	*****
African	*
Caribbean	*
Any other Black/African/Caribbean background	-
Other ethnic group	**1**
Arab	*
Any other ethnic group	*
Refused	*