



WATERMELON



Market Research to support regeneration opportunities for Folkestone Town Centre

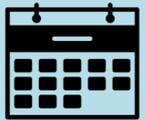
Research Findings

February 2020

Approach

Audiences

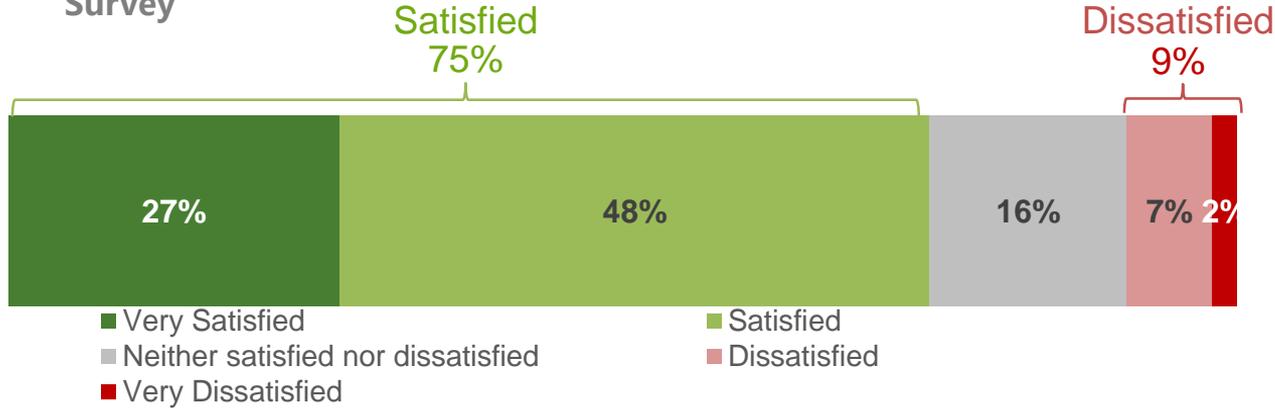
		Method	No. of responses	
Individuals 	Residents and Visitors using town centre	Face to face survey	579 residents 412 visitors	
	Folkestone & Hythe residents (Self-selecting)	Online questionnaire	370	
Businesses 	London-based businesses (Open to moving or expanding)	Online/ telephone survey	79	Small scale representation of business perspective - intended to provide an indicative “snapshot” of views
	Folkestone businesses	Telephone survey	25	

 **Timing**
October-November 2019

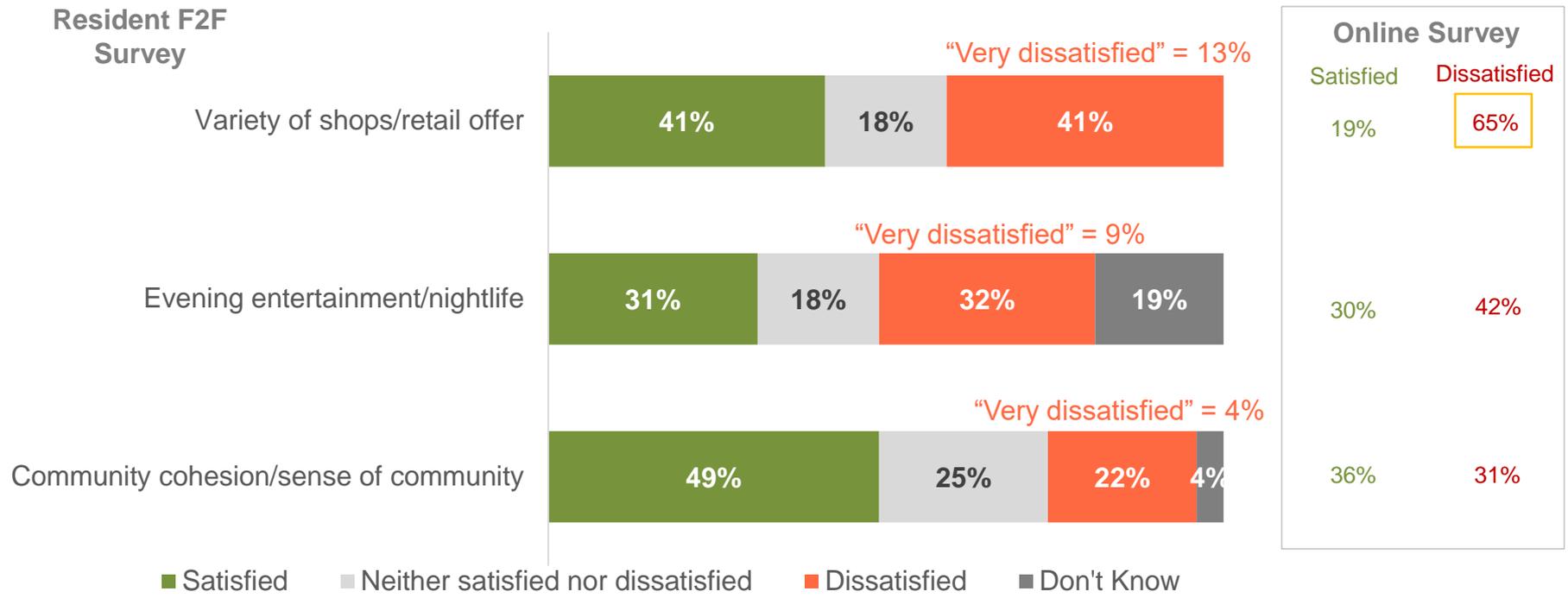
Resident Perceptions of Folkestone & Hythe

Many residents are satisfied with Folkestone as a place to live but satisfaction appears to be below the national average and is particularly low among 16-24 year olds.

Resident F2F Survey



The retail offer, evening entertainment/ nightlife and community cohesion are areas where satisfaction is weaker – less than half of residents are happy with what the area’s current offer.



More than 80% are satisfied with cafes/ restaurants, parks & open spaces and transport connectivity.

Q2.3. How satisfied or dissatisfied are you with each of the following in the district of Folkestone & Hythe....? (Selected aspects shown). Base: All residents. F2F = 579. Online = 370. Watermelon Research

Residents' dislikes about Folkestone most commonly include social issues and aesthetic problems such as being tired, run down or scruffy.

Resident F2F & Online Survey

Best Things about Folkestone

- Seafront position, beach, harbour
- Natural areas e.g. parks, open spaces
- Harbour Arm, shops
- Sense of community, friendliness

Dislikes about Folkestone

- Poverty/ homelessness/ anti-social behaviour
- Tired/ run down/ scruffy
- Litter, dirty/ grubby
- Lack of facilities/ amenities
- Lack of shops, shops closing down

Q4.1. What three things do you like best about Folkestone? Q4.2. What three things do you dislike about Folkestone. Coded open ended responses. Top responses shown. Base: All residents. F2F = 575. Online = 357.

Visiting Folkestone

Visitors' dislikes reflect residents' concerns, with parking also a key issue.

Visitor F2F Survey

Best Things about Folkestone

- Seafront position, beach, harbour
- Harbour Arm, seafood, Creative Quarter
- Shopping
- Old High Street/ Old Town

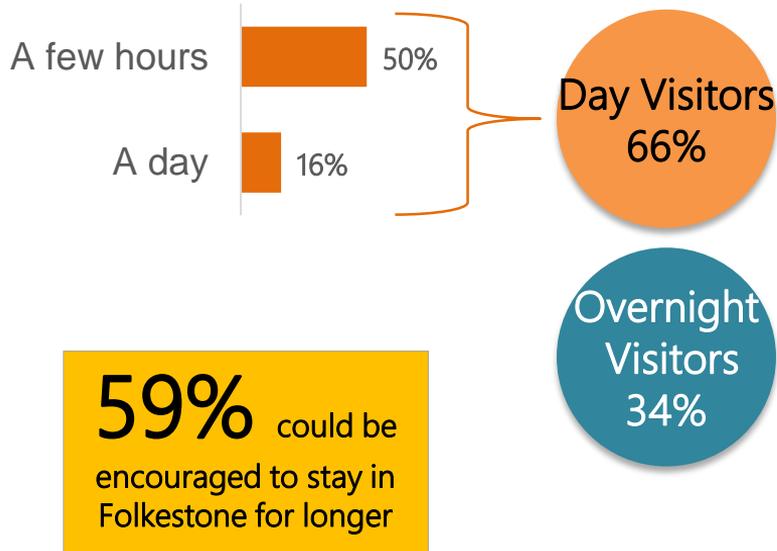
Dislikes about Folkestone

- Tired/ run down/ scruffy
- Poverty/ homelessness/ anti-social behaviour
- Poor/ expensive parking
- Empty shops
- Poor amenities

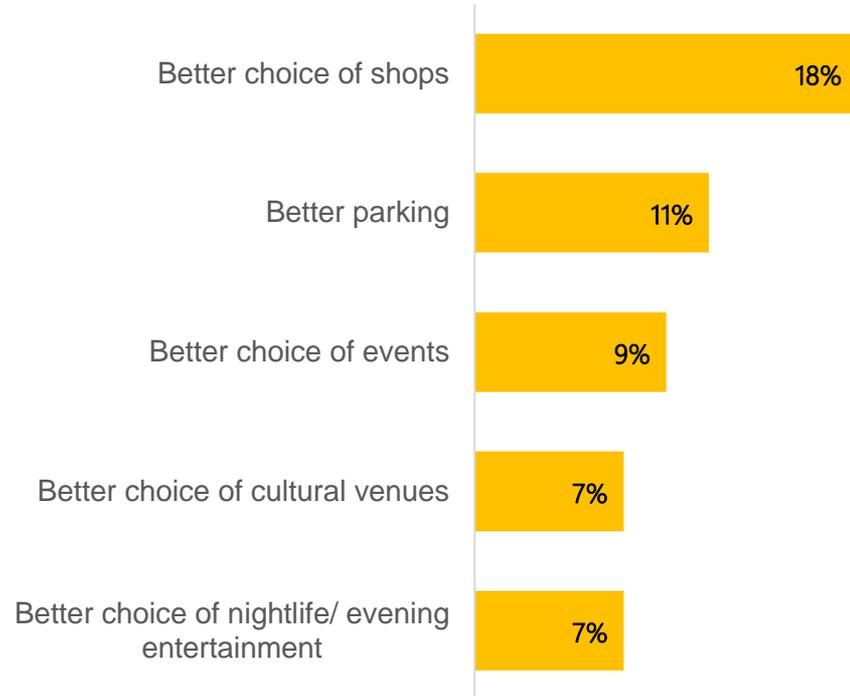
There is potential to increase the time visitors spend in the area. While half were only in Folkestone for a few hours, an improved offer could encourage a longer visit.

Visitor F2F Survey

Length of current visit



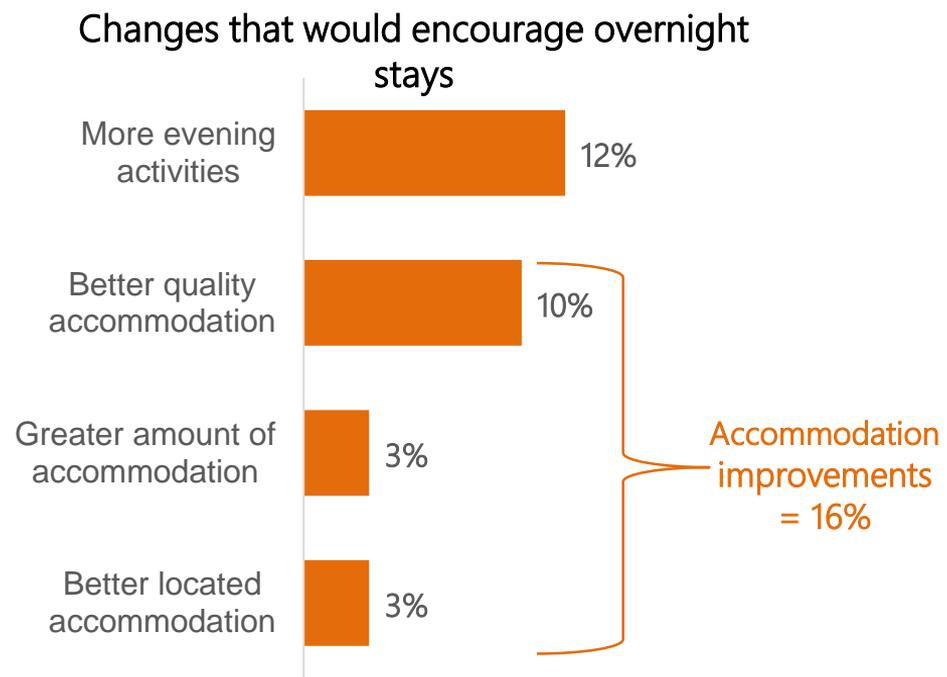
What would encourage a longer visit?



There may also be scope to increase overnight visits. Almost a quarter could be encouraged to stay overnight by either more evening activities or improvements in accommodation choices.

Visitor F2F Survey

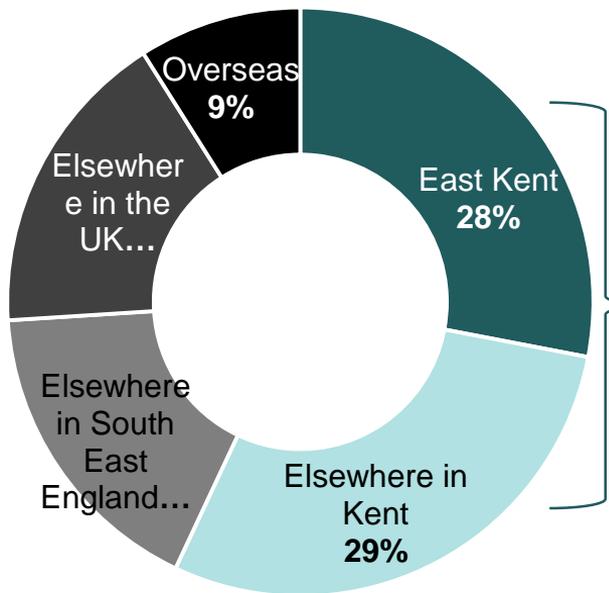
23% could be encouraged to stay in Folkestone overnight



Few visitors had seen any advertising or information encouraging them to come to Folkestone. Recall is even lower among those visiting from within Kent.

Visitor F2F Survey

Visitor Origin



Only **8%** of visitors had seen advertising or information that encouraged them to come to Folkestone

57% of visiting from within Kent

Only **4%** of visitors from Kent had seen advertising/ information about Folkestone

Is there scope to increase promotion of Folkestone, its assets and events to those elsewhere in Kent?

Suggestions for Improving Folkestone Town Centre

Residents and visitors say a better choice of shops would encourage them to use the town centre more often, followed by better parking, nightlife and recreation facilities.

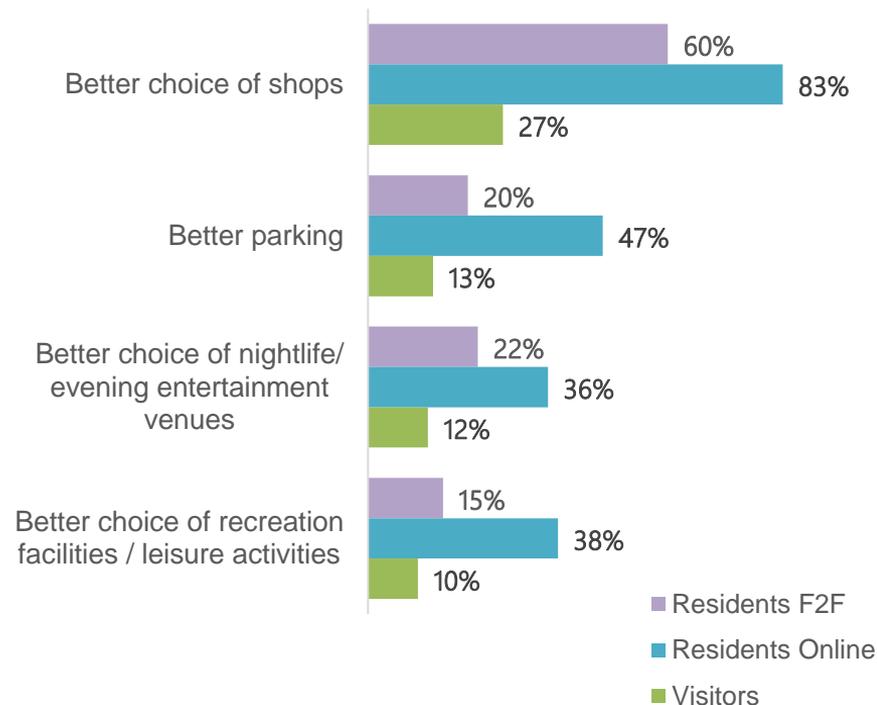
Resident & Visitor
F2F & Online Survey

% who could be
encouraged to come to
Folkestone more often:

Residents (F2F)	84%
Residents (Online)	99%
Visitors	75%

Improvements in the choice of evening activities may be particularly important for those who do already visit frequently so may have limited capacity for further visits during the day.

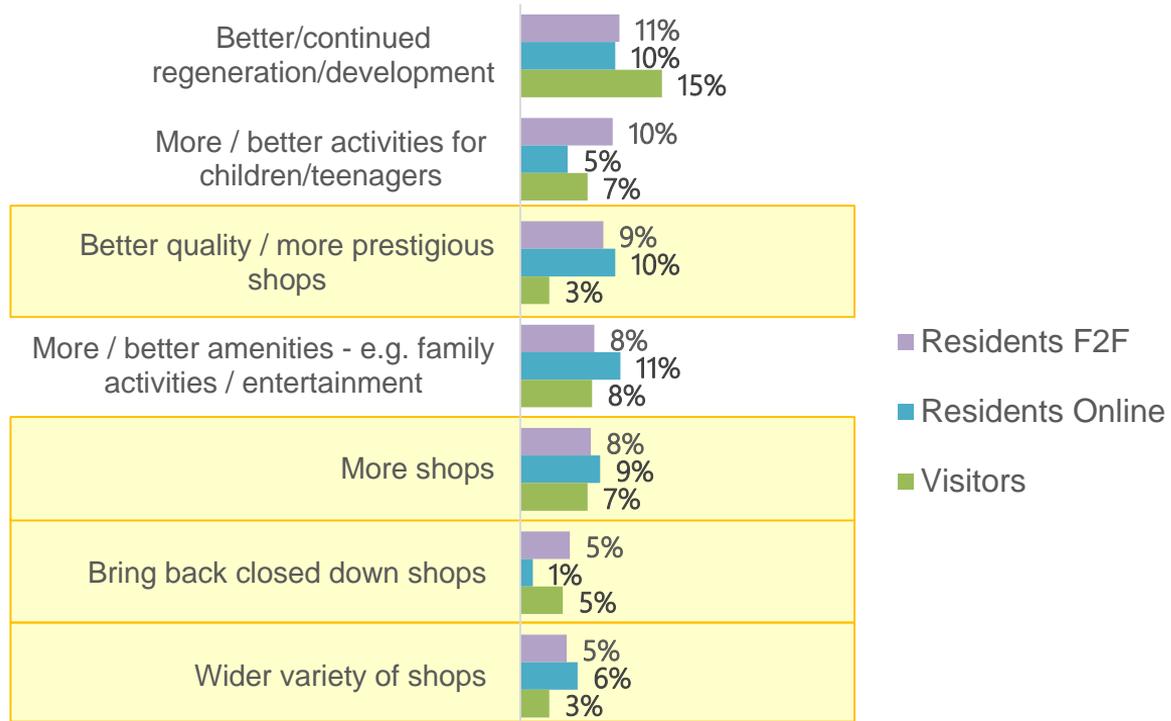
What would encourage more frequent visits to Folkestone?



Improving the retail offer also dominates suggestions for improvements in the next 5 years. Residents and visitors also want to see continued regeneration and development as well as better amenities and activities.

Resident & Visitor
F2F & Online Survey

What should change to improve Folkestone over the next 5 years?



Some respondents praised the efforts that have been made to regenerate or improve Folkestone to date, but others expressed concerns around potential future regeneration plans.

“I worry that the people holding the purse strings and making big decisions see Folkestone as an ever expanding property portfolio with no thought about how the existing and larger future community is going to get along.”

Male 45-54, Employed, Resident



Perceptions of Folkestone as a Business Location

London business generally had low levels of familiarity with Folkestone, especially as a business location.

London businesses' familiarity with Folkestone



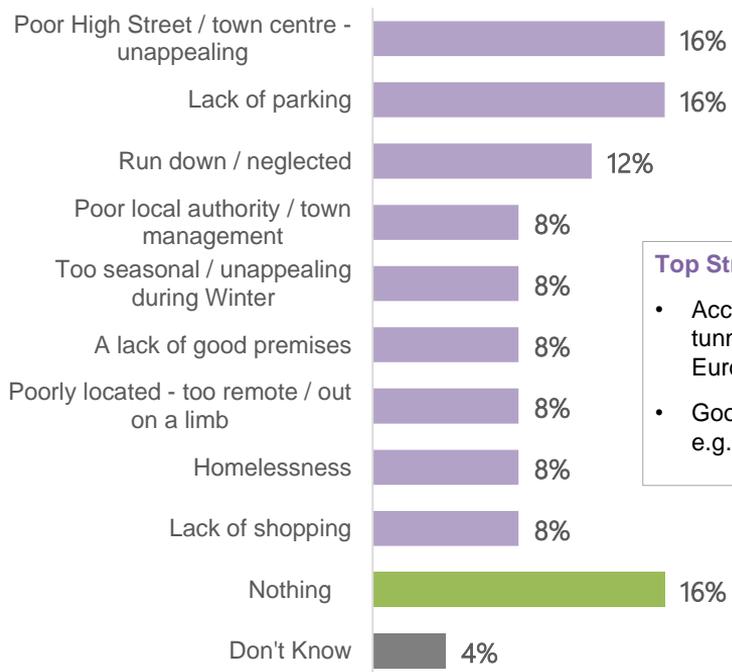
Watermelon Research

Q3.3. How familiar would you say you are with the following? Please answer on a scale of 1-5 where 1 is not at all familiar and 5 is very familiar. 1-2 = Unfamiliar, 4-5 Familiar. Base: All London businesses = 79.

* Note: Low base size. Indicative results only

Weaknesses identified by Folkestone businesses reflect those raised by residents. For London businesses, location is the key concern.

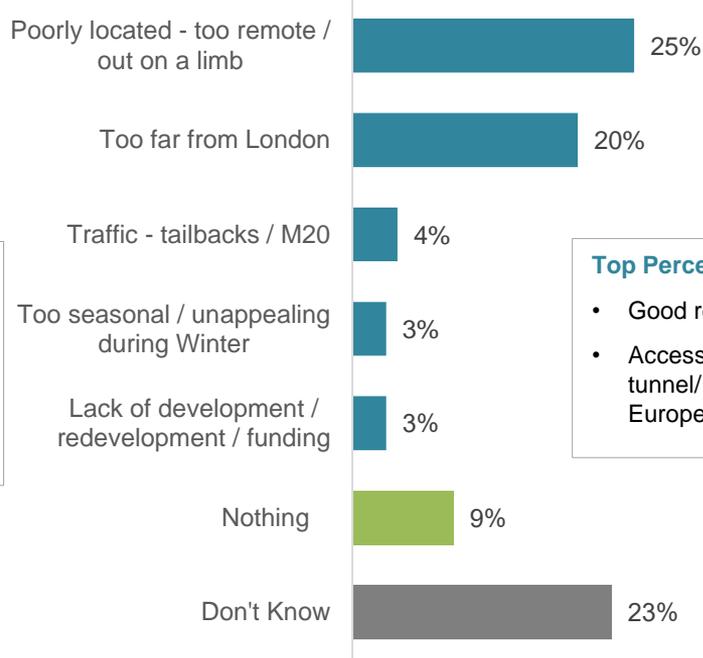
Folkestone's weaknesses Folkestone Businesses*



Top Strengths

- Access to channel tunnel/ ferries/ France/ Europe
- Good links to London e.g. road, rail

Perceived weaknesses London Businesses*

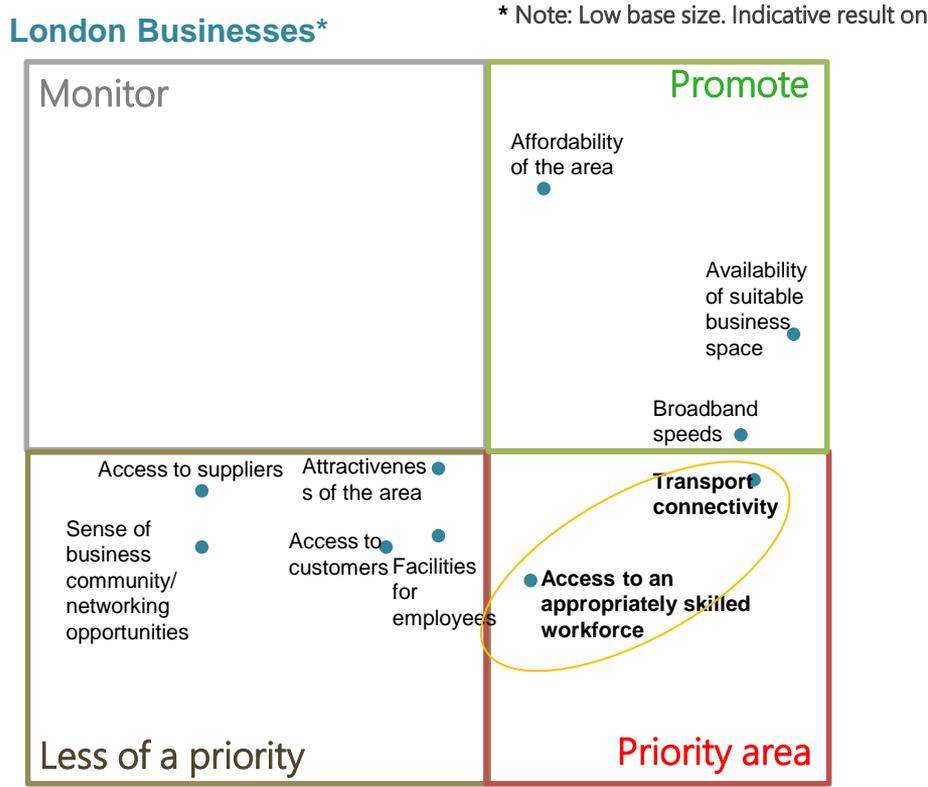
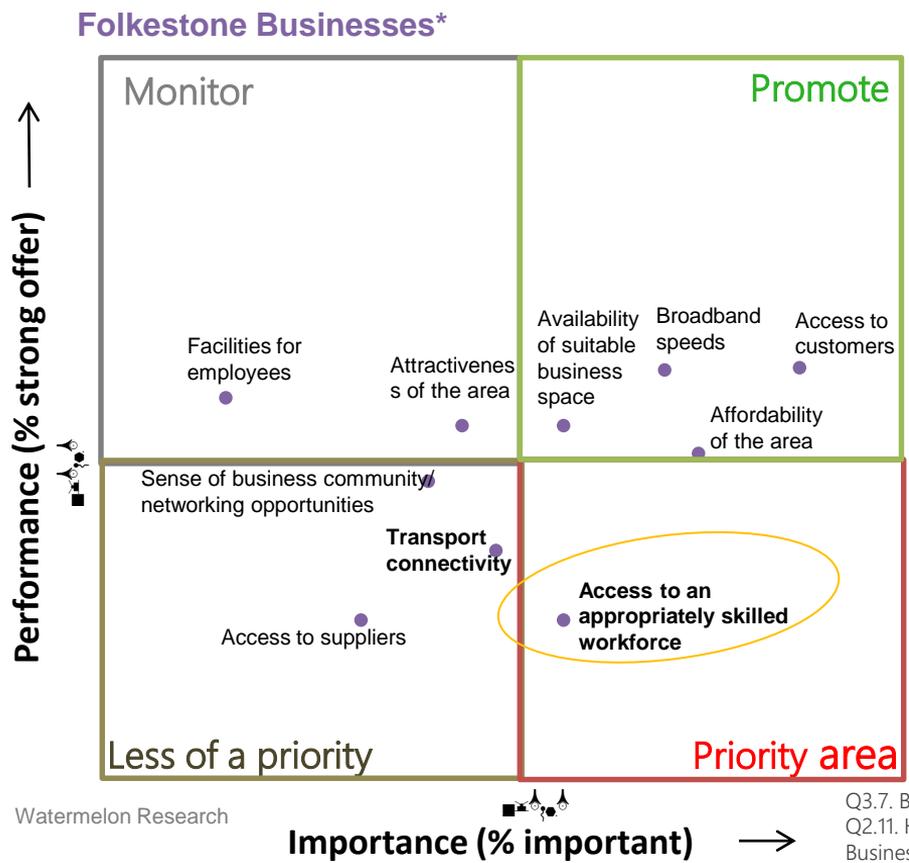


Top Perceived Strengths

- Good rent/ rates
- Access to channel tunnel/ ferries/ France/ Europe

* Note: Low base size. Indicative result only

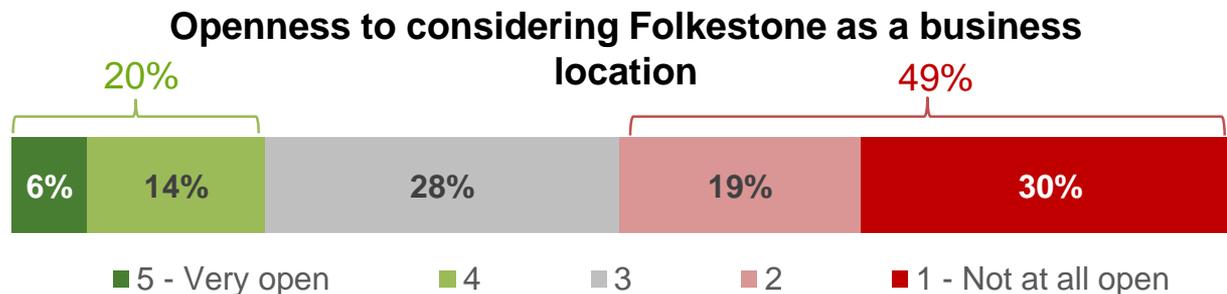
Mapping perceptions of Folkestone's offer against importance to businesses suggests transport connectivity and access to an appropriately skilled workforce as key priorities.



Q3.7. Based on your perceptions, to what extent do you feel that Folkestone would offer you the following?
 Q2.11. How important do you feel each of these factors are in a business location? Base: All Folkestone Businesses = 25. All London Businesses = 79

Attracting London businesses to locate in Folkestone

There is some openness to considering Folkestone as a business location, but distance is seen as a barrier. There is an important "perception" gap around proximity to London.



* Note: Low base size.
Indicative result only

Perceived Distance from London

	Folkestone Businesses	London Businesses
Close to London	76%	24%
A long way from London	24%	51%
Don't Know	0%	25%

Why consider?

- Good location
- Potential good lifestyle
- Lower costs
- Potential to travel back into London
- Open to options

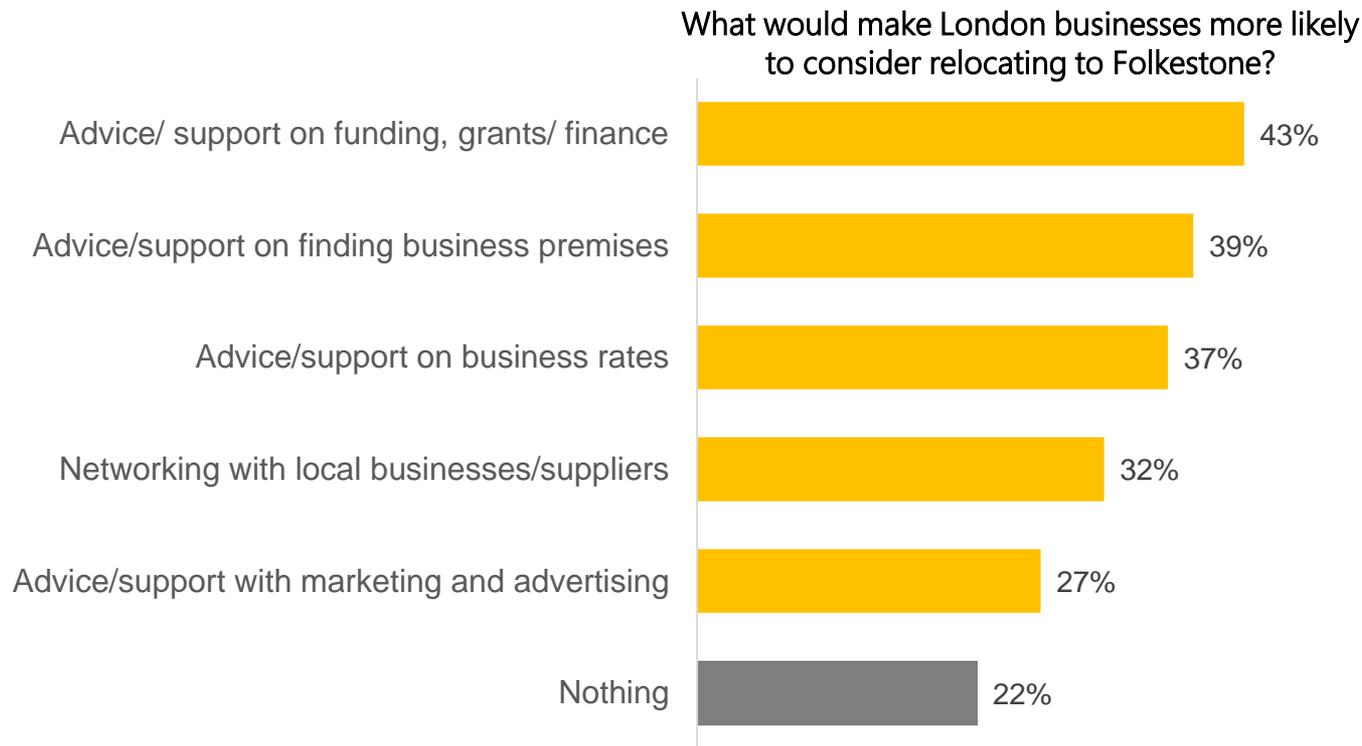
Why not consider?

- Distance from clients/ location of current staff
- Travel times
- Personal ties to London
- *Poor opinion of Folkestone as a location (minority view)*

Advice or support could help to encourage consideration of Folkestone as a business location.

8 in 10 identified advice/ support that could make them more likely to consider Folkestone

27% would be happy to be contacted with more information



Q3.8. Would any of the following make you more likely to consider relocating to Folkestone? Top answers shown. Base: All London businesses = 79

* Note: Low base size. Indicative result only

Key Messages

Improving Folkestone for Residents and Visitors



Improvements for residents and visitors focus around 4 key themes...

Shopping



**Evening
Entertainment**



**Sense of
community**



**Promoting
attractions
and events**



Improving the retail experience



Shopping represents one of the key activities done in Folkestone by residents and is an important reason to visit the area, with both **independent shops** and **high street chains** such as Primark providing a draw.

The shopping / retail offer also forms a commonly identified area of **weakness** for Folkestone and is somewhere where there is felt to be considerable room for improvement.

Parking issues can be seen as a barrier to using Folkestone's amenities, particularly the shops.

This suggests a need to:

- **Further promote** the diverse retail offer that Folkestone already provides (across both independent and high street shops)
- **Support enhancements/ improvements** to the offer e.g. efforts to provide greater choice, address empty shops etc.
- **Tackle/ address parking concerns** – This may involve ensuring parking facilities are incorporated into future development plans and/or promotion of alternatives e.g. use of public transport or cycling, park & ride facilities etc.

Offering more evening entertainment



Relatively few residents or visitors to Folkestone currently participate in **evening activities or nightlife**, but this represents an area where there appears to be **unmet demand for improvements or more options**.

Enhancing this aspect of Folkestone's offer could be particularly important in terms of **increasing frequency of visits** to the town centre and maximising local spending among those who are already regular town centre users during the day. It may also help to increase the **duration** of visits made to Folkestone, including encouraging visitors to stay overnight.

However, some concerns exist around issues such as **anti-social behaviour and feeling safe in the area**, and these may need to be addressed in order to encourage take up of evening activities.

Strengthening the sense of community



Sense of community is one feature identified in the ‘**ideal town centre**’ and Folkestone is currently felt to offer this **to some extent**. The local **people/ community** and the **friendliness** of the area represent some of Folkestone’s key strengths as highlighted by its residents and feelings of ‘community support’ can be seen in attitudes towards using and supporting **independent shops and traders**.

Community cohesion/ sense of community is not one of the more strongly rated aspects of the area in terms of resident satisfaction and there also appears to be some concern around issues such as ‘**gentrification**’ or too much insensitive development that could lead to Folkestone ‘**losing its character**’.

This suggests a need to ensure that regeneration activity **preserves the existing sense of community** and aims to **enhance and deepen** this.

Residents who engage in events in Folkestone are more satisfied with the District as a place to live, and this may help them to feel more **involved/ engaged** with their local area. However, a relatively low proportion of the population take part in events currently, suggesting a case for action to **encourage take up and participation** in these activities.

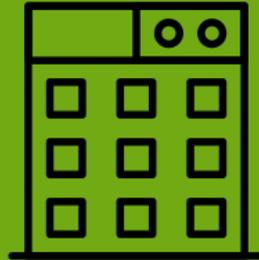
Promoting attractions and events



Recall of any **advertising or information** encouraging a visit to Folkestone appears **very limited**, and particularly low among more 'local' visitors travelling from **within Kent**. This group is important, accounting for more than half of the visitors surveyed, and there seems to be an important core of **'repeat' visitors** coming to Folkestone relatively often.

Greater promotion of events, attractions and amenities available in Folkestone that those elsewhere in the county might not otherwise be aware of may help to further **increase visitor numbers** and to **widen the variety of activities** this group undertakes, encouraging **longer visits** and **increased spending** in the area.

Attracting London Businesses to Folkestone



Encouraging London businesses to consider Folkestone involves 3 key areas...

**Making
“Pull Factors” work
harder**



Overcoming Perceived
barriers:

**Location and
Transport
Connections**



Overcoming Perceived
barriers:

**Accessing a skilled
workforce**



Making pull factors work harder



While levels of familiarity are low, Folkestone is seen to have potential appeal if it can offer benefits less likely to be found in London e.g.:

- **Availability of suitable premises at an attractive cost**
- **“Lifestyle”/ quality of life factors**

Affordability of the area and **availability** of suitable business space are already key perceived strengths, suggesting scope to further build on and develop these perceptions.

Actions intended to improve Folkestone for residents and visitors may also help to strengthen its attraction for businesses based on **“lifestyle factors”**. This proposition may have particular resonance for smaller or younger businesses, for whom proximity to the owner’s place of residence is a key factor in location decisions.

Overcoming Perceived barriers: **Location and Transport Connections**



A key barrier discouraging London businesses from considering Folkestone is **location**, in particular perceived **distance from London** and lack of the **transport connectivity** that London enjoys.

Given unfamiliarity with Folkestone and the large difference in the extent to which Folkestone is seen as “close to London” between Folkestone-based and London-based businesses, this may be more a reflection of **perceived** remoteness, rather than a view based in reality.

This suggests a need to further **increase awareness** of the high speed rail link and resulting travel time to London. It may also help to position messaging around the “**trade offs**” between the strengths of London as a business location (e.g. easy transport connections) and those of Folkestone (e.g. cost of premises, lifestyle).

London businesses will need reassurance that they will still be able to easily access **customers and suppliers**, and for those with strong personal ties to London, access to friends and family will also be important.

Overcoming
Perceived barriers:
**Accessing a
skilled
workforce**



The other key consideration for London businesses is access to a **skilled workforce**.

Ensuring this may involve helping potential relocators to “sell” Folkestone to existing key employees to encourage them to **relocate with the business**, or ensuring that there is a supply of suitably skilled workers locally and **communicating** their availability.

This also represents a high priority area for those businesses **already located with Folkestone**.



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Any Questions?

