

0 EXECUTIVE SUMMARY

0.1 Background

This report presents the findings of the project entitled: *'The Impact of Sustainable Transport Policies on the Travel Behaviour of Shoppers.'* The work for this project was carried out by Transport & Travel Research Ltd with the support of Boots the Chemists Ltd.

Increasing awareness of environmental issues, driven in part by current Government transport policy, has encouraged UK cities to investigate measures to restrict the impact of the private car in the urban area. Whilst this may bring environmental benefits, there are residual concerns over the impact on the local economy.

Since transport policy is usually focussed on the need to combat peak hour congestion, monitoring of travel behaviour also tends to focus on the behaviour of commuters, whilst the reaction of shoppers to travel policy is less well understood. Crucially, however, it is the reaction of shoppers which is likely to play a major role in the economic performance of the urban centre.

In particular, there are considerable, unanswered questions about the reaction of shoppers to travel policy decisions, and the resultant impact on the performance of retail outlets in areas where the impact of the private car has been reduced. Apocryphal evidence suggests that in some cities the enhanced quality of life leads to economic growth, whereas in others reduced car access leads to decline.

Despite the importance of this issue, little research, of a standard that satisfies the concerns of the retail sector, has been undertaken. In the absence of a proper understanding of shoppers' reactions to such initiatives, and in the face of concerted opposition to change from the retail sector, local authorities may err on the side of caution, with the result that concerns about the economic impacts and the perceptions of retailers prevents full implementation of government policy.

Monitoring the health of retail centres relies on the availability of information regarding the centre's performance. Whilst regular monitoring activities are long established in the transport sector, they are a relatively new phenomenon in the context of town centres as a whole. Systematic monitoring of the performance of individual centres has largely only begun following the publication of revised Planning Policy Guidance Note 6 (PPG6) in 1996 and the widespread introduction of town centre management schemes.

Even though PPG 6 already listed a number of indicators that could be used to track trends in shopping centres, the discussion on which sets of indicators are suitable to represent developments in town centres is still ongoing. This is mainly due to the fact that for some

indicators collection of data is not necessarily straightforward and that other or additional indicators may be better suited to reflect local circumstances. Recently the debate has been characterised by an increased pressure on town centre management schemes to prove their effectiveness in order to secure continued and additional funding.

Despite outstanding uncertainties regarding the use and status of Key Performance Indicators among professionals and sponsors, the now widespread existence of monitoring data on town centre health provides a resource which, importantly, can also be used for other purposes. This creates the opportunity to monitor the impact of other changes that affect the town centre, but which are not directly linked to town centre management schemes, without having to commit additional resources.

0.2 Study Objectives

The overarching objective of this study has been to consider the reactions of shoppers to transport measures in order to identify how sustainable transport measures can be implemented in a way, which supports, rather than undermines, the local economy.

A second objective which developed during the course of the work was to develop good practice advice on monitoring the impacts of measures and policies on shopper behaviour.

0.3 The Study Approach

To achieve the study's objective to identify how transport measures can be implemented in a way that does not deter shoppers and lead to a detrimental impact on the health of a retail centre, it was decided that a small number of in-depth case studies should be used for the empirical work, rather than a large-scale survey.

The survey work for each case study comprised three basic elements:

- Interviews with transport professionals
- Retail surveys: Interviews with town centre management/relevant local authority staff
- Focus groups conducted with local residents in each case study area.

The purpose of this multi-layered approach was to seek the widest variety of information on the factors which influenced shopper travel behaviour, in order to enable these to be related to economic out-turn.

Seven centres were chosen as case studies for this study: Birmingham, Edinburgh, Hove, Ipswich, Oxford, Sheffield and Winchester. Each of the centres was subject to changes in the way transport is managed over the last 10 years, mostly within the context of overarching sustainable transport policies. The measures that were taken included pedestrianisation (Birmingham, Hove, Ipswich, Oxford, Sheffield), traffic management/road narrowing measures (Edinburgh, Winchester), introduction of a tram

system (Sheffield) as well as a whole range of complementary measures such as restrictive parking policies, car access restrictions, improvements for public transport, walking and cycling.

0.4 Synthesis of Results

Impacts on Travel Behaviour of Shoppers

The impact on travel behaviour of shoppers of the measures considered can be assessed in terms of the frequency of travel to a particular destination, and the choice of mode

The study found that the impact on shopper travel behaviour of most schemes was limited: presumably the main transport impacts were intended to be on commuter traffic. In major cities like Birmingham and Edinburgh, and also in cities like Oxford, where public transport services are extensive and congestion prevalent, there was some evidence that shoppers are increasingly using alternatives to the car.

In other centres, there is less evidence of this. For example, whilst in Sheffield there is a reduction in car usage, this is not fully compensated for by the increase in public transport and reflects the relative attraction of Meadowhall as a destination. Investment in the tram system serves only a minority of potential shoppers, and enables them to travel quickly to Meadowhall in any case.

There was strong evidence of a willingness to consider modal shift if a viable alternative is available. The cost of bus travel and the safety and security problems associated with cycling remain key barriers. In Hove, the rationalisation of public transport fares has complemented the pedestrianisation scheme with the result that there is some increase in bus usage, although the car still dominates.

This dependence on the car is unsurprising given the need for shoppers to convey goods and, often, children. Attitudes may be reinforced by parking policies which focus on curbing peak hour demand, releasing spaces for short stay. The relative cost of public transport may also be a greater deterrent to non-work trips, especially when a family travels together.

In a number of case studies, measures like park and ride sites, offer a useful service to visitors from out of town and long-distance commuters, but fail to meet the needs of local people travelling to shop. Similarly, public transport measures may enable people to travel out of town to new shopping sites, rather than into the centre.

Overall, therefore, the impact of a number of transport measures which are generally considered to have met their objectives, on the travel choices of shoppers, seems to be much less clear. In many cases, this is a desirable outcome, because local authorities wish to reduce peak hour congestion without causing an economic decline.

If local authorities wish to influence the travel behaviour of shoppers then transport measures will have to consider more closely the behaviour of those shoppers, and be designed specifically with this market segment in mind.

As a consequence of this effect, however, it was apparent from the Case Studies that in each case the transport measures had a broadly neutral (or positive in the case of Ipswich and Birmingham) impact on the performance of the retail sector. There were cases where specific negative impacts were isolated, and a particular concern would be the impact of the implementation process on a sole trader who may not be able to survive a period of reduced trade. Nevertheless, the study can conclude that the argument that sustainable transport measures will have a substantial negative impact on the retail sector is not substantiated.

On the other hand, any benefits which were observed were limited, and often mixed. For example, an enhancement in the quality of the urban centre may lead to rent increases. This may result in a lower level of service to local people because independent local retailers may have to cease trading as they may find themselves unable to increase their sales in line with higher rents.

Impacts on Health of Urban Centres

Figure 1 summarises our interpretation of the findings of the case studies in terms of a judgement of the success of each centre generally. This is based on the views of the participants in the focus groups (qualitative data) and the quantitative indicators. The findings are assembled into the table below and are depicted with a corresponding '+' or '-' depending on the indication of retail performance found. Owing to the absence of standardised sets of quantitative data across the cities, the table below serves as a broad illustration only and cannot be read as an entirely accurate positioning of the centres in relation to each other.

Figure 1 - Interpretation of the case study findings

	<i>Quantitative Data</i>	<i>Qualitative Data</i>
<i>Birmingham</i>	+	++
<i>Sheffield</i>	--	--
<i>Hove</i>	-	++
<i>Ipswich</i>	-	++
<i>Edinburgh</i>	+	--
<i>Oxford</i>	++	-
<i>Winchester</i>	-	+

The case studies have shown that there have generally been three types of transport measures implemented in the city/town centres, these are the traffic management measures, measures to improve access and measures to improve ease and attractiveness of using the centres. The most successful schemes have given consideration to all three types of

measures and Sheffield is the only example where transport measures can be seen to have had a clear detrimental effect on retail performance, it is acknowledged that this has been due to a protracted implementation process, coupled with external factors. The following recommendations for transport schemes are therefore put forward:

- Traffic management measures (such as car restriction policies and parking policies) must be combined with measures to improve the ease of access and attractiveness of city/town centres
- Attention must be paid to the continuing maintenance of elements such as street furniture and paving put in as part of transport measures (for example pedestrianisation, provision of cycle facilities) to ensure the highest quality environment for the shopper
- External factors must be considered and mitigated where possible; the timing of the implementation of measures should be co-ordinated so as not to coincide with other major disruptions to usage patterns (for example nearby out of town retail development)
- Physical improvements to an area of the city/town centre cannot be implemented in isolation to other areas, the case studies have shown that parts of a city/town centre can become marginalised as a result of works in another part of a town
- Transport measures should also consider movement within the centre as well as the general quality of the stay in the centre.

Scheme monitoring that works

Monitoring the impact of transport policies must go beyond the immediate transport effects and include the wider economic impact on stakeholders. This, in turn offers a number of benefits to local authorities: It enables thorough evaluation of measures, may show a need for adjustments and in many cases most importantly, forms a well-founded base for discussion of measures between the Council and the public, other stakeholders and even between different local authority departments. This in turn helps to ensure that transport schemes conform to wider government policy. Therefore we think that wider monitoring should become an integral part of larger schemes which affect town centres.

Currently the effects of transport measures on retail performance are generally not quantified consistently and in some cases there have been no comprehensive steps taken to measure the effects because of a lack of resources and guidance.

In order that monitoring information is useful, quantitative data must be collected which covers both vitality and viability indicators. This will help to reduce inconsistencies as often it is assumed that because a retail area shows some signs of vitality (for example increased pedestrian flows, which could be a result of larger tourist numbers) it is successful.

The study has generated a series of recommendations for the monitoring of the wider impact of transport measures. This includes a new common set of indicators to be created

with clear definitions, building on the current PPG 6 examples. These indicators should be relatively simple to collate and interpret. Very importantly, guidelines on how data can be collected in a consistent way across all local authorities and over time need to be set out. The base set of indicators as set out below should be common to all local authorities, whilst they would be free to include any number of additional indicators.

0.5 Conclusions

This study has undertaken an in-depth assessment of the impacts of transport policies in seven cities on the travel behaviour of shoppers and the resultant economic performance of the urban centres.

The study has confirmed that the impact of most schemes is focused on the reduction of peak hour traffic, and that the behaviour of shoppers is often less substantially affected. A wide range of influencing factors which govern the overall impact of the scheme were identified and have been put forward, but the overlying conclusion is that the perceived detrimental impacts of sustainable transport policies on the retail sector are not evident. Where a downturn can be identified, this is usually related to external factors.

There is also evidence of a notable resistance to modal shift amongst shoppers, but an acceptance that alternative modes could be utilised where they to provide an adequate level of service. Investment in Metro schemes, and frequent, reliable and low cost bus services are likely to prove attractive. Many Park and Ride schemes, on the other hand, do not serve the needs of local residents living within the urban area.

At present, the impact of such schemes is not assessed in a consistent manner, and the study has presented suggestions to improve monitoring and enable more accurate future assessment of policy impacts.