

The Impact of Sustainable Transport Policies on the Travel Behaviour of Shoppers

Final Report



Prepared for

DTLR

by



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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 polices) 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.

1 INTRODUCTION

1.1 Background

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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.

1.2 Monitoring

At the outset of the study, it was apparent that the approaches to this problem of the retail and transport sectors differ greatly. The transport sector will monitor the number of people accessing an urban centre, but not the actual impact on the local economy. The retail sector will evaluate retail performance, but this is not often monitored over an adequate period of time to enable an objective conclusion to be drawn. Moreover, retail statistics alone do not show the complex factors which influence shopper travel choices.

Any assessment of the impact of transport policies and measures on the travel behaviour of shoppers must try to relate the impact on travel behaviour to the economic outcome of policy changes. This is the eventual impact on retail performance and the health of the urban centre.

The assessment of the health of a retail centre 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.

In this context, a number of publications have issued guidance on the use of key performance indicators by town centre management schemes. Two important corporate sponsors of town centre management schemes, J. Sainsbury¹ and Boots the Chemists², have started to push for objective evaluation of town centre management schemes and each set out their views on this and which indicators should be used. The Association of Town Centre Management (ATCM) has also published practical guidance to its members which sets out how town centre managers should choose a set of Key Performance Indicators and how to obtain necessary data³. The ATCM guidance takes a cautious view on the use of Key Performance Indicators for benchmarking purposes as is frequently advocated.

Researchers from Manchester Metropolitan University completed a study in 2001 which surveyed the use of Key Performance Indicators in town centre management from the perspective of town centre managers⁴ in which advantages and disadvantages of different indicators were explored.

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.

Such a wider application of Key Performance Indicators to assess the impact of other measures, such as transport measures, is however still relatively rare. The approach taken by Oxfordshire and Oxford Councils in accompanying the implementation of the Oxford

¹ J.Sainsbury plc. 2000. *Helping Towns...Supporting the Urban Renaissance – Sainsbury's Town Centre Management Evaluation Programme*. London. J. Sainsbury plc.

² Boots the Chemists. 2000. *Helping Create Better Towns for Tomorrow*. Nottingham. Boots the Chemists

³ The Association of Town Centre Management (ATCM).2000 (?). *Key Performance Indicators*. London. ATCM and <http://www.atcm.org>

⁴ Hogg, S., Medway, D. 2001. *Key Performance Indicators in Town Centre Management –Manchester Research Report 2000/1*. Department of Retailing & Marketing. The Manchester Metropolitan University

Transport Strategy by a comprehensive monitoring programme as part of a European Commission research project⁵ is therefore noteworthy.

1.3 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.

1.4 Structure of the Report

This report is structured into six sections. The first section, which is the introduction, provides the background to the study. It explains the focus of the research, provides a context and presents the objectives. Section 2 sets out the methodology. This section details the survey work undertaken and therefore outlines interview procedures and data collected; it also describes how the focus groups were conducted in each case study area.

Section 3 presents the case study cities that have been chosen for the research. In this section a brief introduction is given to each of the seven case studies followed by a description of the retail context, the transport measures implemented and the timings. After this a summary of the quantitative data collected to assess retail performance is given, this includes the time series data from the boots stores and other quantitative indicators collected by retailers or City/Town Centre Managers. The attitudes towards the transport system and its impact on the retail experience of users are also presented: these were derived from the focus group discussions. These are followed by the opinion of the professionals in the case study areas (i.e. the transport officers and City/Town Centre Managers). A verdict is then formed from the findings. Finally, the interrelationships of transport and other important factors relating to each centre's health are represented in a causal loop diagram.

Section 4 contains the analysis of the findings. This is achieved by first of all identifying to which degree each of the retail centres were considered to be successful and then identifying the influence of the transport measures on the relative success of the centre. Changes in travel behaviour as a result of the transport measures are then considered. Section 5 outlines the key factors affecting how transport measures impact on the retail sector and highlights important considerations in implementing transport measures. Section 6 is the final part of the report, and contains the recommendations.

⁵ Environmental Monitoring of Integrated Transport Strategies (EMITS), www.oxfordshire.gov.uk/emitsidx

2 THE STUDY APPROACH

2.1 Introduction

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. As case studies we chose centres that saw the implementation of transport measures over the last ten years, which can be classed as 'sustainable transport policy'. The case studies selected cover different regions within the UK, different sizes of urban area and different transport measures.

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

- Interviews with transport professionals to establish the timescale and details of sustainable transport measures implemented in each case study area as well as monitoring.
- Retail surveys: Interviews with town centre management/relevant local authority staff to establish which indicators are used to monitor the health of the centre in each case study area. Interviews were also conducted with Boots the Chemist store managers to discuss factors affecting turnover figures both before, and after, the implementation of sustainable transport policies in each case study area. In addition, a variety of sources were used to obtain data on town centre health indicators, where these were not available from the Council or town centre management.
- Qualitative public opinion surveys (qualitative data collection). 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.

A detailed report of the survey work was submitted as Deliverable 3 "Survey Report". This includes appendices with full lists of all those interviewed, summaries of the focus groups and raw data sources that were used.

2.2 Interviews with Transport Professionals

For each case study area, face to face interviews were undertaken with relevant local government officers who were involved in the implementation of the transport measures or were familiar with the schemes.

Data collected for this element of the research was largely qualitative and provided a valuable insight into the timings of schemes and local issues surrounding the introduction of measures.

Modal split data, showing how users travel into the case study areas, is however an example of the type of quantitative data obtained from these interviews.

2.3 Retail surveys

For the retail surveys, City Centre Managers or relevant local government officers and shopping centre managers were interviewed to establish the retail performance in all of the case study areas.

Interviewees were able to give an overview of the retail offer and performance of the individual retail areas. A more detailed analysis was then enabled through the collection of vitality and viability indicators (specified in PPG6) for periods before and after transport schemes were implemented, as a way of establishing the effect of transport policies on retail centres.

Generally, 'before' data dates from immediately before measures were put in place and 'after' data dates from at least 12 months, but not more than 24 months after completion (in order to allow for stabilisation of trading patterns). During the interviews with local government officers however, it became apparent that in some cases there needed to be some flexibility on this point, given the disruptive influence of road works associated with some schemes, and the staging of implementation on others.

Where possible, before and after data was collected for the following vitality and viability indicators as listed in PPG6:

- Diversity of uses
- Retailer representation
- Shopping rents
- Proportion of vacant street level property
- Commercial yields
- Pedestrian flows
- Accessibility
- Customers views and behaviour
- Perception of safety
- State of the town centre (environmental quality)

The data collected was both quantitative and qualitative. The interviews helped to identify many additional factors, such as complementary or rival development, vital in the analysis of the retail performance of centres.

Due to the sensitivities and enormous variations, both in terms of the collection and recording of the more commercial retail data such as rents, yield and turnover, Boots the Chemist supplied time-series data for the Boots stores in case study areas. The advantage of this type of data is the consistency in data measuring. Furthermore, Boots is also regarded as a brand leader with no significant rivals, whose status on the High Street, despite some competition, has remained relatively constant

In order to verify the data, interviews were conducted with store managers to check average weekly takings and establish factors to be taken into consideration when looking at trends in the time series data (i.e. modification to stores and inventory and also changes in competitors and other local factors). National turnover figures (for all of the Boots stores) were also obtained to provide a benchmark for the local figures.

2.4 Qualitative public opinion surveys

To complement the information gained from the interviews with transport and retail professionals and the quantitative data, we conducted a focus group in each of the case study areas. These comprised mostly local residents who had lived locally for at least 10 years and visited the case study shopping centre regularly.

The purpose of the focus groups was to identify attitudes to the centre in general and in particular to the transport measures implemented. They also helped to identify any overlooked factors that may have influenced travel behaviour and considered issues raised by the transport officer surveys and the retail surveys.

The topic guide used was tailored to the needs of each case study, following the outcomes of the transport officer surveys and the retail surveys. Broadly, discussions dealt with the following issues:

- Perceived quality of the retail centre
- Access to the retail area
- Quality of the transport system

The discussions lasted for approximately one and half hours and gave individuals the opportunity to voice their opinions on the quality of their local shopping area and what had happened following the introduction of transport schemes. Participants were also asked to consider how their travel behaviour for shopping trips had changed or what factors had or were likely to influence this.

After conducting the seven focus group discussions, transcripts of all of the focus groups were prepared and analysed.

3 THE CASE STUDIES: MEASURES, FACTS AND PERCEPTIONS

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.

In each of the following sections which summarise the case studies, we briefly introduce the centre in terms of its general characteristics and its retail function, then give an overview over the transport measures that were implemented in the centre and then summarise the survey work in terms of the quantitative data that was available, the views of professionals that were interviewed, the views of users as expressed in the group discussions. Each section concludes with a cautious interpretation (the ‘verdict’) of this jigsaw of information in which we aim to identify the impact the transport measures in each centre have had on the retail sector.

This conclusion is aided by the presentation of a causal loop diagram (see box for an explanation) for each case study area to illustrate the cause and effect relationship between the transport measures implemented as well as other important factors and the retail performance of each centre.

Causal Loop Diagrams

A causal loop diagram has been produced for each case study area. Causal loop diagrams have been chosen as a medium in this instance because they help to explain the suitability of certain measures to address specific problems in a clear and simple way

A causal loop diagram consists of elements connected by arrows denoting positive or negative relationships amongst the elements.

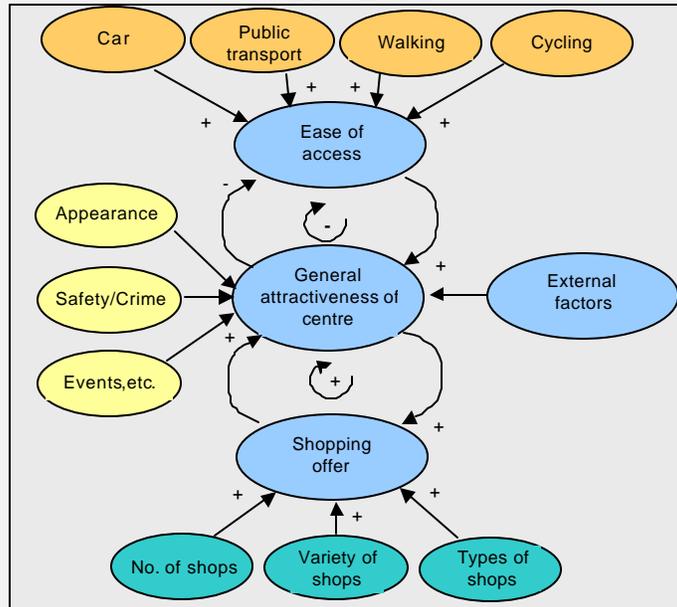
These elements can affect other elements and can be affected themselves. Cause-effect relations can then be shown by the arrows and each cause-effect relation is indicated as either positive (+) or negative (-). Figure 2 below shows a generic causal loop diagram used as a basis for each of the case study causal loop diagrams.

Figure 2 reflects the cause and effect relationships in the context of sustainable transport policies and retail performance. This is examined through three different elements: ‘Ease of access,’ ‘Attractiveness of the Centre’ and ‘Shopping offer.’ The diagram shows the effects of each particular transport policy on the ease of access to the case study centre; this in turn shows the type of effect this has on the overall attractiveness of the centre.

Where elements mutually affect each other, so called ‘Loops Identifiers’ (depicted as a circular arrow with a positive or negative sign in the middle) show whether the effect is reinforcing (positive) or balancing (negative). So in the example below ‘shopping offer’ and ‘attractiveness of the centre’ have a mutually reinforcing effect on each other. This is because an increase in attractiveness would normally lead to more shops wanting to locate there and an enhanced shopping offer would improve the centre’s attractiveness. In contrast, the relationship between ‘attractiveness of the centre’ and ‘ease of access’ is presented as balancing.

This is because increased attractiveness is likely to result in increased numbers of shoppers and therefore reduce the ease of access, whilst increased ease of access is likely to increase the attractiveness of the centre. The casual loop diagrams are therefore a simple way of presenting the effects of the various sustainable transport policies on the effects of the retail performance of the cases study areas.

Figure 2 – Causal Loop diagram showing how key factors influence each other with regard to town centre’s health



3.1 Birmingham

Birmingham is the UK’s second city with around 1 million inhabitants and contains the most significant concentration of retail, business and cultural activity in the West Midlands Region. Central Birmingham is a leading example of city centre regeneration and has been at the forefront of regeneration initiatives in Britain. There have been many key developments in the city recently, including the National Indoor Arena, the International Convention Centre and Brindley Place. In addition to previous city centre investment, a further £2 billion of investment is either planned or underway. This investment is targeted at significant regeneration schemes, including retail developments, and is happening in conjunction with public transport improvement projects.

Retail

The principal shopping concentrations, within the major city, are focused around New Street and the indoor shopping centres of the Pavilions and Pallasades. Significant retail additions in the city centre have occurred over recent years and more large-scale retail re-development and major changes are imminent, including the redevelopment of the Bull Ring which will accommodate major department stores. The Mailbox development, which opened in 2001, is designed to attract higher spenders. The city centre retail policy, therefore, is now to attract shoppers who would normally shop in London through the provision of a concentration of designer stores, in a good location, with convenient access and car parking. Significant

competitive shopping destinations around the city centre include Merry Hill (classed as a regional out of town centre), the Fort in north-east Birmingham, and more recently the Touchwood shopping centre in Solihull town centre.

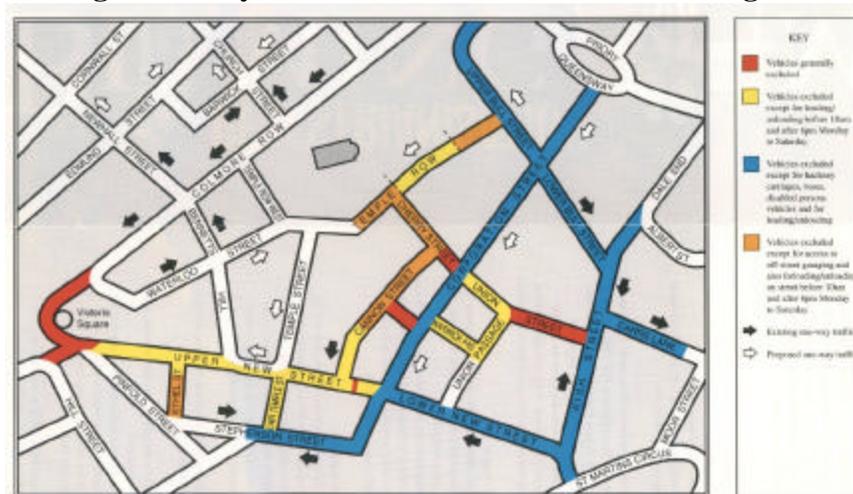
Transport Measures

The pedestrianisation of New Street, the principal shopping street in Birmingham city centre, has been carried out in two phases.

Phase 1, pedestrianisation of Upper New Street

The main streets of Birmingham city centre were closed to traffic in September 1991. No private cars were allowed into Upper New Street, Corporation Street, Bull Street and High Street. Buses, coaches, hackney carriages, orange Badge Holders and anyone needing to load or unload large or heavy items were however still permitted along the streets designated as ‘limited access streets’ (shown in blue in Figure 3 below).

Figure 3: City Centre Pedestrianisation in Birmingham



Source: Birmingham City Council, 1991

Buses were still allowed into Corporation Street, the lower part of New Street, High Street, Bull Street and Dale End to enable good accessibility to the central shopping area. City centre bus routes and bus stops were changed in accordance with these measures. One notable change was to change bus flows downhill to lessen fumes in September 1991. Prior to the road closure 1,000 buses ran along New Street per day.

Once the general traffic had been removed facilities for pedestrians were greatly improved; high quality surfacing materials, more trees, seats and places for public art were introduced; incorporating the redesign of Victoria Square which was completed in 1992. The aim of the Square was to create a welcoming place and provide also for the first stage of a diagonal through pedestrian flow, which would eventually stretch all the way from Broad Street to New Street

Phase 2, pedestrianisation of Lower New Street

Following on from the closure of Upper New Street to all traffic, Lower New Street was finally closed to remaining traffic (i.e. buses hackney carriages and disabled persons vehicles) in June 2000. This has permitted full-scale pedestrianisation along the whole of the length of New Street. Cycling is still permitted along New Street and along the bus routes. The City Council is currently in the process of reviewing cycle access on New Street and wants to begin to work up a priority network based on a consultation exercise.

It is still the intention that Victoria Square will be at the heart of a pedestrian link across the centre of town. The link is now to stretch from and connect with the new major attractions; that is the ICC at one end, and the new Bull Ring, at the other end. The link will also incorporate the Hall of Memory at Paradise Circus.

The Data

Data for Birmingham city centre is not totally comprehensive. This is owing to the fact that the pedestrianisation along New Street occurred in two phases. Data for the first phase of pedestrianisation along Upper New Street, which occurred in 1991, was extremely difficult to find and often was not monitored at all. Data for the second phase of pedestrianisation (completed in 2000) is also difficult to collect, since the 'after' data period has only just elapsed.

Overall, it can be seen that rent levels did not rise immediately after the first phase of pedestrianisation. There has however been a sharp increase in rent levels between the first and the second phase of pedestrianisation. Yield levels have remained at a constant level since 1994. Vacant units along New Street have decreased dramatically from 1993-2001 and A3 (food and drink outlets) units have also increased, reflecting an increase of coffee shops in the city centre. Furthermore, the data included in the Lockwood⁶ report shows that turnover figures are positive between 1993-8. A visitors' survey conducted in 1999 shows that over 70% of those surveyed expressed satisfaction with entertainment, department stores, places to eat and ease of walking around the city centre.

Boots do not keep data for 1990 and so it is not possible to analyse takings trends for the first phase of pedestrianisation along New Street. The data for the store in Upper New Street shows that there was a slight increase in takings after the second phase of pedestrianisation in Lower New Street (the store in Lower New Street, however, was relocated to the High Street store in 1998, prior to the second phase of pedestrianisation in Lower New Street). The store manager of the High Street store said that the pedestrianisation along New Street had definitely added to the ambience in the city centre but pointed to a number of other factors which should be considered when looking at the Boots data between 1990-1995. A major factor was the company-wide decision in 1995 to begin Sunday trading and the development work that was occurring around Birmingham city centre. As a result of this, there has been a

⁶ Lockwood, J.I. 2000. 'The Lockwood Survey 2000: Capturing, Catering and Caring for Consumers.' Urban Management Initiatives.

major change in competitors. The opening of a new department store, Beatties, in the city centre and the Sainsbury's supermarket has had an effect on the sale of core toiletries. New development such as the Touchwood shopping centre in Solihull, and also shopping development in the city centre, such as the Mailbox, has also affected turnover.

The Users

Users expressed initial comments relating to the disruption of the city centre as a result of the new development occurring; despite this they felt that Birmingham city centre had definitely improved as a result of the pedestrianisation of New Street. Participants thought that one of the best aspects of pedestrianisation had been the removal of buses from New Street and thought that the removal of buses from Corporation Street would improve the city centre further.

With regards to weekend shopping, many respondents said that they preferred to shop at alternative destinations, such as the Fort, even though the quality of shops in the city centre was a lot better. The reason for this was that they felt that New Street was now too busy at the weekends. Participants also stated that they preferred to do their shopping by car at the weekends because changes to bus services had made travelling by bus confusing and they were uncertain as to how to find out bus information. Better information, along with better enforcement of bus lanes, were cited as two factors that would encourage participants to use public transport more often.

On the whole the users were supportive of the measures implemented in Birmingham and felt that the city centre had improved dramatically as a result of the pedestrianisation and the development work. They felt that the quality of shops in particular had improved and anticipated that shops would improve further still after the development work was complete. Participants felt that a tram service would complement the improvements and make it easier to move around the city centre and access new developments around the centre.

The Professionals

The Principal Projects leader at the City Council was in charge of the first phase of pedestrianisation along New Street in 1991 and has been working on the city centre since then. He felt that the changes to New Street had had a very positive effect and remembered that prior to the pedestrianisation the shops along New Street were in a very dilapidated state with many charity shops and vacant units. Now there are hardly any vacant units and most of the shops are occupied by national multiples. The City Centre Manager has only been in post since the second phase of pedestrianisation. He felt that New Street now offered a very attractive shopping environment and this would improve further still once the other development work was complete. He was also conscious that much of the city centre resembled a building site at the present time because of the Bull Ring development but said that considerable effort had gone into keeping disruption to a minimum. He said that retailers had expected a negative impact as a result of development work but that this has not been the case. Visitors to the city centre were also increasing as a result of attractions such as Millennium Point which has exceeded the number of visitors anticipated. He also said that there had been a 30% increase in retail outlets in the city centre in the last five years and a

10% increase in the catchment area, which indicates that Birmingham is now having a far wider geographical appeal.

The Verdict

Although there was great difficulty in collecting a consistent data set to show the retail performance of Birmingham city centre before and after the first phase of pedestrianisation, data trends indicate a positive improvement in performance as a result of both phases of pedestrianisation. To reinforce this statement the focus group consensus was that the environment and quality of shops in the city centre have improved dramatically since the first phase of pedestrianisation. The City Centre Manager also feels that traders have witnessed benefits as a result of the improvements to New Street. It should be pointed out that the pedestrianisation of New Street is only one part of a package of measures to improve Birmingham city centre. Developments occurring at the same time of both phases of pedestrianisation such as the Mailbox, Millennium Point, Brindley Place and Broad Street have played a part in the increased vitality and viability of the city centre. Owing to this it is impossible to extract the direct benefit of pedestrianisation on the data obtained.

It is expected however that the retail performance of Birmingham city centre will increase further as remaining development work is completed. The opening of the new Bull Ring shopping centre in particular will have even greater impacts on the retail offer and further transport measures will continue to improve access into and around the city centre.

Figure 4: Causal Loop diagram showing the interrelationships of key factors with regards to Birmingham City Centre

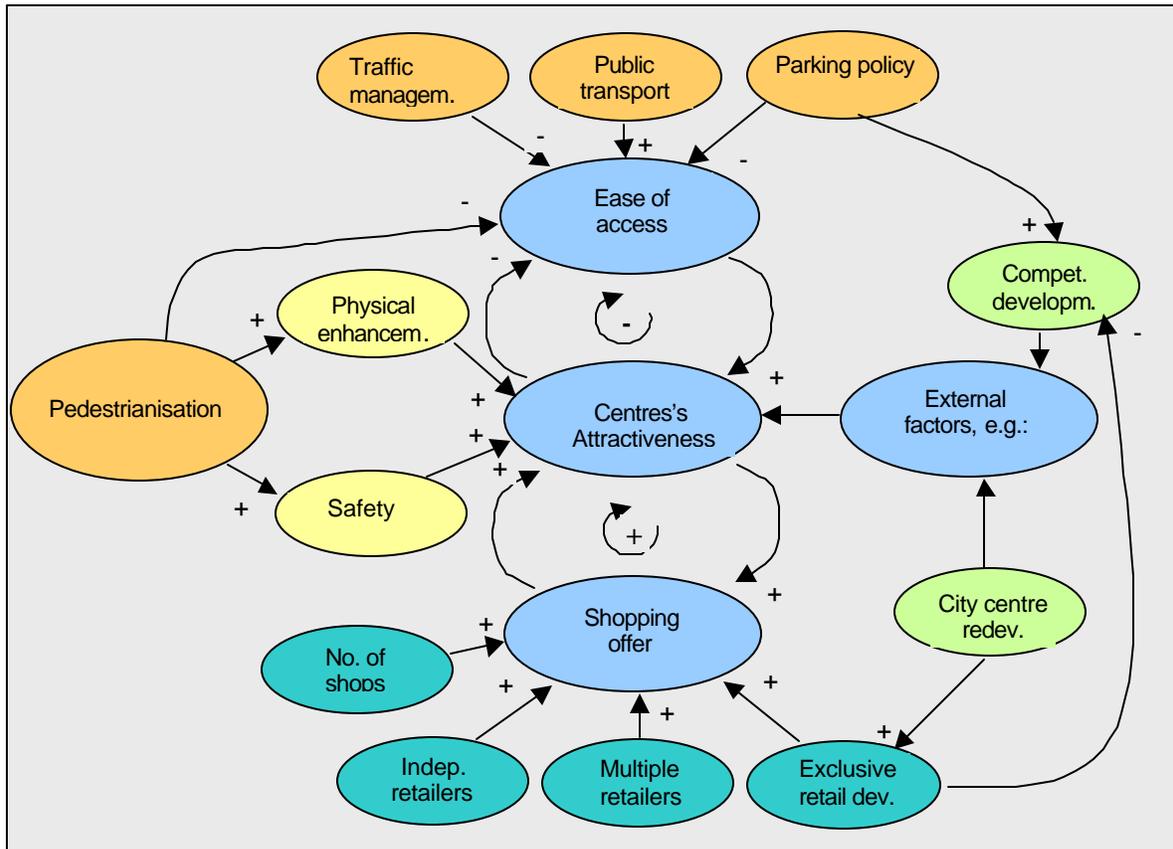


Figure 4 gives an overview of the main impacts of sustainable transport policies in Birmingham city centre with regards to ease of access, attractiveness and shopping offer. It can be seen that:

- There have been 4 types of transport measures implemented in the centre (pedestrianisation of the main shopping street, traffic management measures, public transport improvements and increases in parking charges), which have resulted in physical enhancement and safety improvements
- Whilst increased parking charges have encouraged people to shop in alternative destination (shown by the positive link to competing development), city centre redevelopment, encourages more people to shop in the city centre (shown by the negative link to competing development)
- The shopping offer in Birmingham is very positive with regard the number and types of shops.
- Physical enhancement and exclusive retail development, brought about through pedestrianisation and city centre redevelopment, have done much to improve the attractiveness and strengthen the role of the city centre.

3.2 Edinburgh

Edinburgh is the capital city of Scotland, with a population of around 450,000 (1996 estimate); furthermore, many people from Lothian, Fife and the Borders come to the city to work and shop. The city's economy is based on a modern service industry. Banking, finance and tourism are all extremely important, with manufacturing making up just 10% of employment. There is a large knowledge economy with three universities and a number of higher and further education institutions. Edinburgh is also the seat of the Scottish Parliament and, accordingly the base for the headquarters of many financial and non-governmental organisations.

Retail

Edinburgh city centre is recognised as the focal point for shopping and related services in south east Scotland, occupying a position at the top of the retail hierarchy. It continues to trade very successfully, with high volumes of customers throughout the year. Princes Street is the undisputed prime-shopping frontage with rental levels far surpassing other city centre locations. Princes Street and St. James Centre are home to virtually all of the city's major department stores. When last surveyed in 1996/97, city centre floorspace stood at 241,500 square metres (gross), which amounts to 27% of the city total. The composition is heavily orientated towards non-food shopping with fashion, leisure goods, personal goods and 'lifestyle' shopping providing the main backbone. Edinburgh faces competition from other centres such as Glasgow, Newcastle and Stirling. The main edge-of-town centres are 'The Gyle' Centre, which has a high turnover for comparison goods, Newcraighall, and Cameron Toll where sales are particularly high for convenience goods.

Transport Measures

In order to make better provision for the extremely high pedestrian flows on Princes Street, the council removed general traffic from the north carriageway in 1996. The extra road space was given over to pedestrians by providing wider footways (see Figure 5 below). Initially, this reduced overcrowding near to the shops and brought about welcome reductions in road accidents and air pollution. It is now held, however, that the increased footway has once again reached capacity.

Public transport access to the city centre shops has also been given greater priority through the introduction of 'Greenways' routes on five main arterial routes into the centre in 1997/98. These routes are reserved for buses at specific times of day which has resulted in improved journey times and additional bus passengers.

Figure 5: Widened footways for pedestrians along Princes Street



Source: TTR Ltd. 2001

The Data

Retail performance is difficult to compare before and after pedestrian priority took place along Princes Street (and the Greenways were implemented) because no consistent system of monitoring has been in place. There have, however, been retail studies carried out in 1986, 1998 and 2000. Data from before and after transport measures were introduced shows that rental levels have increased slightly. Rental values also increased substantially between 1996-98 in the Waverley Shopping Centre and George Street reflecting retailers' willingness to consider alternative sites to Princes Street. Yield⁷ levels however also show a slight increase. Further data was collected as part of the 1998 Retail Strategy but this is only for the 'after' period of implementation. Data shows that turnover has increased between 1998-2000 marginally. The data in the Lockwood Survey gives an indication of the overall trend in turnover between 1993-1998 and indicates that city centre performance is average.

Travel data⁸ show that between 1985 and 2000 there has been a big increase in the number of shoppers arriving by foot and a decline in car trips to the city centre by shoppers. There has also been a large increase in the number of shoppers who travel to the city centre by train, reflecting improvements to train services. There has however been an overall decline in bus usage.

The store manager at the Boots store on Princes Street reported that footfall has not increased in the store for a very long time. Turnover also declined during the study period but it was pointed out that a change of management and a change in inventory happened around this time. It was also thought that the development of Newcraighall and Craighall might have had an impact on sales. Other stores at the St James Centre and Shandwick Place had refits around the time that measures were implemented; Shandwick Place showed a dramatic increase in sales

⁷ Retail yields are seen to demonstrate long-term investor confidence. Yields are expressed as a percentage. Note: The lower the yield figure for a retail centre is, the higher is investor confidence; this means that a yield increase shows an undesirable trend.

⁸ City of Edinburgh Council. October 2000. 'Edinburgh and Lothian Shopping Surveys'

The Users

Owing to the close proximity of residential areas in Edinburgh, many of the focus group participants were able to walk or catch the bus into the city centre for shopping purposes. These modes were definitely the preferred options during the week as the price of parking was thought to be too expensive. On Sundays however, when parking was free, a few participants said that they changed their travel habits and used the car. The cost of parking was therefore a major deterrent in using the car for shopping trips.

Participants felt that the quality and range of shops along Princes Street has declined in recent years. They said that outlets were dominated by the major retailers, who, they suspected, could afford the high rents that the Street commanded. Although the majority of participants were positive about the priority measures, they felt that the extension of pavements along Princes Street had resulted in the Street becoming even busier. Rose Street and George Street were therefore chosen as alternative shopping areas by many participants because they were less busy and housed a number of independent retailers, which they preferred. Following on from this, participants felt that Princes Street offered little variety and that they could just as easily purchase equivalent items in other shopping destinations such as Glasgow and 'The Gyle' (in Edinburgh). They also thought that the general appearance of shops along Princes Street had deteriorated.

The group did, however, appreciate the removal of the eastbound traffic along Princes Street. They felt more comfortable as a result of the removal of buses close to the pavements. Participants were also positive about the Greenways in Edinburgh and the savings in journey times that they had brought. They wanted to see real time passenger information systems introduced and said that this would encourage them to use the buses more, as would more stringent enforcement of bus lanes. Improvements to public transport had however also made it easier for participants to travel to 'The Gyle' shopping centre just outside the centre.

The Professionals

The Projects Leader and the Senior Research Officer at Edinburgh City Council said that the pedestrian priority measures in Edinburgh had been met with a mixed response originally but after implementation there had been overwhelming support. They were also aware that footfall had increased to fill the additional capacity provided for along Princes Street during peak hours. It was acknowledged that Edinburgh, was a highly popular and unique shopping destination but this in itself did not prevent a number of shortcomings being identified by shoppers. In particular it had been revealed that shoppers dislike the lack of independent retailers in the city centre and this is one aspect to be addressed in order to compete with other shopping destinations such as Glasgow and Newcastle

The Verdict

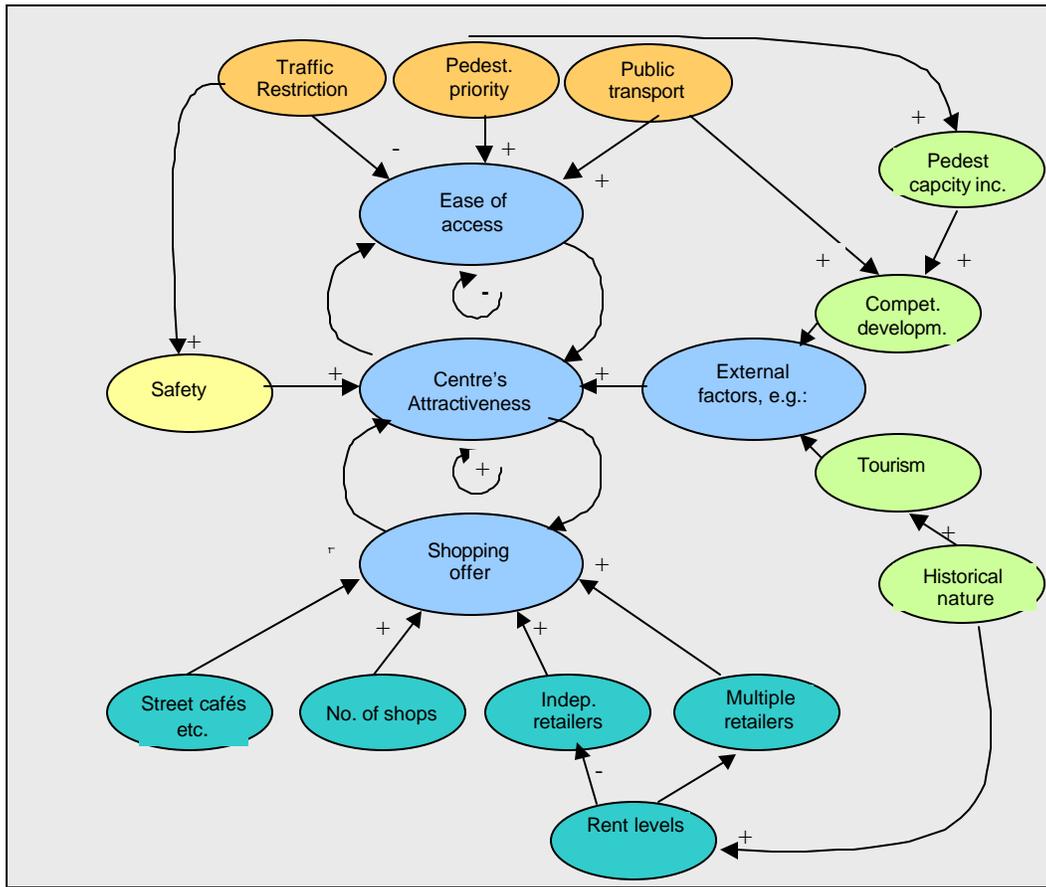
Edinburgh offers a unique shopping environment due to the historical aspect of the city. Rents are very high due to the land values, which are among the highest outside London and so even though rents appeared to have increased after transport measures were implemented

in Edinburgh, the yield also increased. This indicates that confidence in the city was not necessarily high.

Another result of the historical nature of Edinburgh is the high number of tourists who visit the city throughout the year. As the professionals pointed out, there has already been an increase in the number of people on the walkway in Princes Street, to fill the extended capacity, in peak hours. This has undoubtedly done much to increase the vitality of the city centre. Edinburgh also developed a 'café culture' around 15 years ago, far earlier than a lot of cities and this encourages people to mingle in the city centre, and this also adds to the vitality of the city.

On the viability front however, there is no consistent data available to assess the viability of the city centre and compare the situation before and after pedestrian priority measures were implemented. Whilst there is nothing to suggest that the city centre is in decline, Deliverable 3 (The Survey Report) found that turnover figures were average. Boots data also revealed that turnover in the store on Princes Street actually decreased during the period of study and footfall in the store had not increased in a long time. This position was also reinforced during the focus group discussion, in which participants said that they believed that Princes Street had lost its appeal over the last few years. The dominance of multiple retailers had meant that variety along the Street had been lost. They also felt that the atmosphere had decline, despite the removal of eastward bound traffic, as the Street was too crowded with pedestrians. This has directly resulted in many of the group preferring to go elsewhere in the city to do their shopping.

Figure 6: Causal Loop diagram showing the interrelationships of key factors with regards to Edinburgh City Centre



The causal loop diagram for Edinburgh City Centre, shown in Figure 6 shows the main impacts of implemented sustainable transport policies with regards to ease of access, attractiveness and shopping offer. The causal loop diagram indicates that:

- There have been 3 types of transport measures implemented (traffic restriction, pedestrian priority and public transport improvement), with traffic restriction, providing the only negative relationship to improving access
- Pedestrian priority measures have had the effect of increasing pedestrian capacity, which has encouraged users to shop elsewhere (shown by the positive relationship to competing developments)
- Public transport improvements in the city centre have resulted in improved access to the city centre but also to competing development
- There are various external factors at play in Edinburgh, a major source of these is the historical aspect of the city, a positive link in the diagram, shows how this factor has the effect of increasing rent levels in the city centre.
- Increased rent levels in the city centre have been to the detriment to independent retailers in the city centre (shown by the negative link) but have not been as much of a threat to the multiple retailers.

3.3 Hove

Before the local government reorganisation, which resulted in the creation of the unitary authority Brighton-Hove, the Borough of Hove used to be part of East Sussex County Council. The total population of Brighton-Hove is around 250,000, of which nearly 70,000 live in Hove. Brighton-Hove is a regional focus for shopping, employment and tourism. In addition, it is home to an important conference centre and two universities.

Retail

Hove's retail centre around George Street is not classified according to the national hierarchy of centres and its function is similar to that of a large district centre. The retail offer comprises comparison as well as convenience goods and a range of cafes / bars / restaurants and services. The retailers include local branches of national retailers and independent local retailers. There are few vacancies, but a relatively large number of charity shops. The main competing shopping destinations are Boundary Road in Portslade-by-the-Sea and out-of-town supermarkets for convenience shopping and Brighton city centre and other nearby centres such as Worthing and the regional shopping centre Bluewater for comparison shopping. Brighton city centre is classified as a major regional centre.

Transport Measures

The Council commissioned a 'Central Hove Study' in 1998 to help revitalise the central Hove area, which was perceived to be in decline. Based on earlier work, the study recommended the pedestrianisation of George Street as a core scheme, complemented by a number of other measures.

An experimental Traffic Regulation Order (TRO) was made in March 1998 which restricted access to George Street between the hours of 10 am and 4 pm from Monday to Saturday. As a complementary measure, disabled parking and loading bays were provided on the surrounding streets close to George Street. The scheme was made permanent after a public inquiry in summer 1999. Environmental enhancements, including repaving of the whole street creating a level surface, installation of benches and planting of trees, were completed in summer 2001. Also in summer 2001, parking in Brighton-Hove was decriminalised and controlled parking zones were introduced in the area surrounding George Street.

Figure 7: Pedestrianised George Street, Hove



Source: TTR Ltd. 2001

The Data

The data available for Hove is not entirely conclusive. Pedestrian flows were down dramatically in 1998 compared to 1997, but the 1998 counts took place at a time when World Cup football was being shown on TV and in one case when the weather was bad. In 1999 and 2000 (for the latter year there is no data available for George Street itself) figures improved overall, but without reaching the 1997 level in most locations. In some locations there were dramatic increases.

Vacancies on George Street have increased from 2 to 4 units. Turnover was not monitored from a large enough sample to have meaningful results; a survey conducted by the Hove Business Association among members showed a decrease in turnover immediately following the introduction of the scheme. Yield increased from 8.5 to 9.5 between 1994 and 1998, but has gone back down to 9 since the second half of 1999.

Customer views surveys showed high levels of satisfaction with the scheme.⁹

The Boots store was extended in the after year, so that the data showing an increase in sales is misleading. The manager stated that turnover was down by around -3% following the scheme, but that it now seems to be back to normal.

The Users

Users were very positive about the scheme. Despite the fact that most used to drive and still drive to shop in George Street nobody wanted to see cars allowed back into George Street. Most found that they spend more time and visit more outlets now. George Street was less

⁹ Oscar Faber. 1998. *Hove Centre Area Study*. Appendix 8 to P. Bloxham's Proof of Evidence for the Public Inquiry into the Brighton & Hove (George Street, Hove) (Experimental Closure) Order 1998

popular now for brief visits, for which it is no longer seen as convenient. Even those that were initially opposed to the idea had now positive attitude towards the scheme. They hoped that the quality of the shops would now improve and that fewer charity shops would be present. Their perception was that George Street was now very busy, particularly on Saturdays. People welcomed the increased safety the scheme brought and only criticised that cars are admitted again after 4pm. This rule was introduced to allow disabled drivers better access to the shops in George Street.

Despite the overwhelmingly positive reception of the scheme among users, it became clear that the majority of the group still mainly used the car to shop in George Street, even though a few now sometimes use public transport following the introduction of flat fares. To that extent, the wider aim to encourage the use of more sustainable transport modes, as expressed in the Public Inquiry into the scheme and the LTP, has not been achieved. This was despite most people having a relatively high opinion of the quality of public transport services in Brighton-Hove.

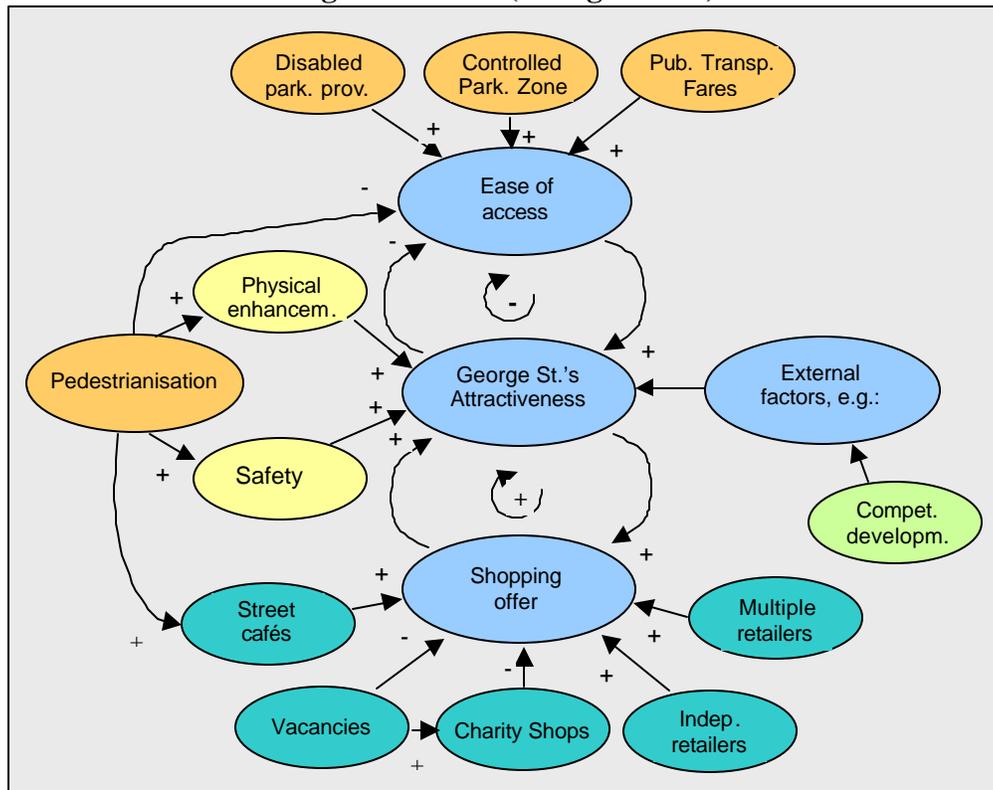
The Professionals

It was stated that George Street had been in continuing decline as a shopping location since the mid 1980s, when important anchor stores in central Hove closed down and that the efforts to improve the situation are now showing signs of fruition. The scheme was seen to have achieved all its transport and regeneration objectives. It was stated that the majority of the traders were initially against the scheme, but that this has changed now and only few were still very opposed. The Business Support Executive said that many traders are willing and interested to co-operate with the Council and other parties to help improve the situation in George Street. There are currently attempts to brand Hove as a free-standing attractive location for shopping and going out.

The Verdict

The pedestrianisation of George Street can cautiously be regarded as a success. Users felt very positive about shopping in George Street and the recent environmental enhancements will make it even more likely that people will spend more time and as a result probably also more money in George Street. There is a small concern that George Street will lose a proportion of trade because customers who would have just come into the centre to quickly buy one or a few items may now choose alternative destinations where they can still drive to. This may affect some stores more than others, dependent on different customer profiles, and could ultimately lead or have lead to the closure of some stores. Other businesses however are set to benefit from the increased passing trade, so that overall the effect could be expected to be a positive one. The change in retailer opinion from widespread opposition to majority support as perceived by the Business Support Executive also supports this interpretation. In so far, it could be assumed that some of the changes which would indicate a negative trend, e.g. the increase in vacancies between 1998 and 2000 are less a sign of decline than a result of a changeover. Given a historic pattern of decline, the results should, therefore, be seen in a positive light.

Figure 8: Causal Loop diagram showing the interrelationships of key factors with regard to Hove (George Street)



The causal loop diagram for George Street, shown in Figure 8, shows the main impacts of implemented sustainable transport policies with regards to ease of access, attractiveness and shopping offer. As shown in the causal loop

- the main measure, pedestrianisation of George Street, was complemented by several other transport measures; mainly the provision of disabled parking spaces, the introduction of a controlled parking zone and restructured public transport fares.
- these measures have overall had a positive effect on access to the centre, despite the obvious restriction imposed by the pedestrianisation .
- the shopping offer includes independent as well as multiple retailers, a mix which contributes to the centre’s attractiveness. There are however a number of vacant units and a large number of charity shops, which are seen to reduce the quality of the shopping offer.
- the pedestrianisation has had a very positive impact on the perception of safety and enabled environmental enhancements which improve the overall quality of the shopping experience. It also enabled cafés and bars to provide outside seating, which enhances the overall offer of the centre.

3.4 Ipswich

Ipswich, the county town of Suffolk, has a population of approximately 117,000. The town is a long established and growing inland port that continues to handle bulk freight transport. It is

a regional shopping and commercial centre. The population of the town and its immediate hinterland is some 150,000, which is expected to rise to 160,000 in the next ten years.

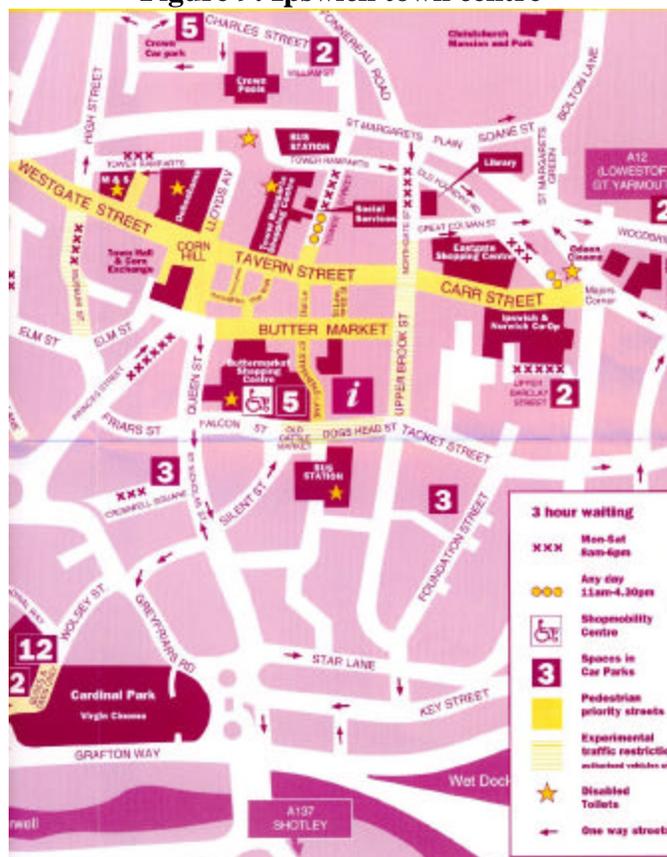
Retail

Ipswich is classified as a 'regional' centre; the nearest other regional centre is Colchester, which is a major competing centre along with Cambridge and Norwich. Lakeside, a regional super-centre is also a competitive shopping destination and is located only 60 miles away. The retail centre in Ipswich is concentrated along Westgate/Tavern Street and spreads into the Butter Market, a parallel shopping street, via a number of small passages. The Butter Market accommodates the Buttermarket shopping centre, which has gradually filled with mainly small independent local retailers and a food court since it opened in 1991. The Tower Ramparts shopping centre is located along Tavern Street and contains the mainstream multiples. Overall, retail offer in Ipswich comprises mainly comparison goods and a range of cafes, pubs and restaurants. The eastern part of the town centre town along Carr Street houses many discount shops. This area is separated from the main shopping area by Upper Brook Street where traffic was permitted until an experimental restriction (buses and authorised vehicles only) was introduced over the last year.

Transport Measures

The pedestrianisation of the Butter Market was carried out in 1996. It was the intention that the pedestrianisation would funnel some of the shoppers from Westgate/Tavern Street, which was pedestrianised in 1988, into the Butter Market and the Buttermarket shopping centre. The work was completed as part of a Section 106 agreement with the owners of the Buttermarket shopping centre. Under the pedestrianisation scheme, the street was closed to general traffic except to local, not national, traders with special permits.

Figure 9: Ipswich town centre



Source: Ipswich Borough Council, 2000

This measure is part of the ‘hub and spoke’ approach to traffic management that the Borough Council has adopted in Ipswich. The ‘hub’ is the town centre, and the ‘spokes’ are the radial corridors into the town centre. Ipswich has five principal roads into the town and these are being treated to improve public transport, cycling and walking. The improvements for public transport include priority measures for bus lanes. These benefit existing bus services, the buses serving the two Park and Ride sites in Ipswich, as well as the nationally acclaimed Superoute 66 bus service.

Within the town centre, the aim is to create a pedestrian dominated environment with a gyratory system that will carry only vehicles requiring essential access. Currently a new bus circulatory scheme is being implemented between 1999-2001. The scheme is designed to make it easier for pedestrians, cyclists and buses to move around the town centre by minimising the amount of non-essential traffic on certain streets. As part of this, an experimental scheme restricting access to traffic, introducing one-way streets, traffic claming measures and pedestrian improvements has already been introduced.

The Data

Rent levels have increased since pedestrianisation of the Butter Market. Yield figures in the year immediately following the pedestrianisation show a rise, but since then they have continually been decreasing. These figures would therefore contradict the rising rent levels,

but it should be taken into account that these figures would relate to the town centre as a whole and include areas which are on the periphery to the pedestrianised core. There was however a small rise in vacant property levels in the year following the pedestrianisation but, similarly, this was generally confined to the peripheral shopping area, separated from the main pedestrian core. The Lockwood data shows that takings have declined between 1993-8, but this conclusion was made from a limited sample of shops; turnover is not monitored by the Borough Council or the Town Centre Manger. Travel data shows that the number of cars in the town centre have declined and buses have increased. A shopper attitude survey, commissioned by Ipswich Borough Council¹⁰, showed that the majority of respondents viewed Ipswich as being an above average shopping destination. They viewed the pedestrianised core very positively but felt that areas away from the core were neglected and in danger of becoming isolated.

Boots data shows that takings in the Buttermarket shopping centre store increased despite there being inventory changes and changes in management. The store in Tavern Street shows a decline in takings but the store manager said that this situation was attributable to the opening of out of town developments at Copdock and Martlesham Heath, rather than the pedestrianisation of Butter Market.

The Users

The main concern amongst local residents appeared to be the cost of parking. The high price of parking means that shoppers are not encouraged to stay for longer than they need in Ipswich. Pedestrianisation is seen as a positive measure and users wanted to see the scheme extended into neighbouring streets as currently there is a feeling that Ipswich is limited to one main shopping street. They also thought that buses travelled too close to shoppers in areas such as Upper Brook Street. Users also thought that the emergence of a 'café culture' would complement pedestrianisation measures.

The high cost of parking in the town centre did not however seem to deter shoppers from driving into the town centre as bus fares were also perceived to be expensive. Many said that they would use buses more if fares were cheaper. Park and Ride was thought to be a cheaper way of travelling into the city centre for visitors and workers, rather than local shoppers, as the location of sites meant that many would have to travel out of the town in order to catch services and travel back in again. Colchester was seen as an alternative shopping destination because parking was said to be cheaper and offered more variety, although the shops in Ipswich were felt to be improving.

The Professionals

The council's transport engineer said that the pedestrianisation of Butter Market was designed as an extension to the first phase of pedestrianisation that had taken place along Tavern Street/Westgate Street, with the aim of funnelling shoppers into this area. Transport policies are part of a series of strategies planned until 2006 and although there are no specific

¹⁰ Ipswich Borough Council. 1999. 'Ipswich Town Centre Attitude Study.'

modal split figures for trips into the city centre for shoppers, it is believed that more people come to the town by bus now. This is as a result of measures, such as the introduction of the Superoutes.

The Buttermarket shopping centre was designed to be an upmarket fashion-led shopping destination but was opened in the middle of the recession in the early 1990s. Many units were consequently left empty and the shopping centre had to lower the profile of its shops. The town is slowly recovering and the primary shopping street Westgate/Tavern Street now accommodates good quality mainstream multiples. The Butter Market has always been the secondary shopping street but it is intended that the second stage of pedestrianisation will enable the Buttermarket shopping centre to become an anchor at the bottom of the town centre and will attract mainstream multiples. The shopping area eastward from Carr Street is viewed very much as the cheap end of the town centre as it mainly accommodates discount stores. Although this street is pedestrianised it is segregated from the pedestrianised area of Westgate/Tavern Street by Upper Brook Street, which has a heavy flow of buses.

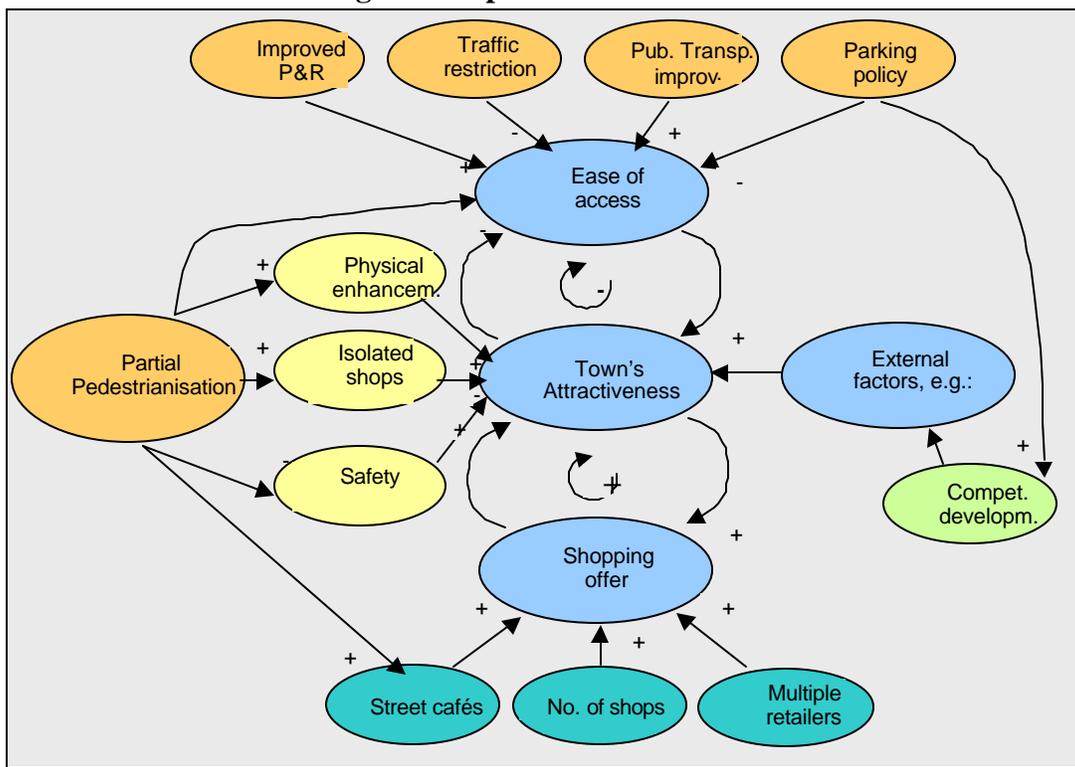
Pedestrianisation is seen as a success by the transport professionals in Ipswich and this is put down to the fact that the scheme has been designed to the highest of quality and is also well maintained.

The Verdict

Although there is no consistent data to say that pedestrianisation has had a positive effect on the performance of retail outlets in Ipswich, both the transport professionals and the retailers see the pedestrianisation of Ipswich as acting as a catalyst to the improvement of the shopping area. Although there is no consistent monitoring of turnover carried out in Ipswich, to measure viability, there has been an increase in mainstream multiples and street cafés over recent years. The focus group participants also thought that the quality of shops has improved in the town. Furthermore, they felt that pedestrianisation has ultimately improved the shopping environment and want to see further areas incorporated into existing schemes. Car usage in Ipswich seems to have decreased and this is thought to be a result of sustainable transport policies in the town.

When looking at the town centre as a whole, the area east of Carr Street is not as successful because Upper Brook Street separates it from the main pedestrianised core. This street is now subject to an experimental traffic restriction scheme in which buses still have permitted access. Shoppers now feel threatened by the heavy flow of buses and this street effectively separates the eastern side of the town from the pedestrianised core. Consequently, many shoppers do not venture beyond Upper Brook Street and so Carr Street is not as viable and accommodates discount stores and a number of vacant properties. It is viewed as the cheaper end of town.

Figure 10: Causal Loop diagram showing the interrelationships of key factors with regards to Ipswich Town Centre



The causal loop diagram in Figure 10 shows the main impacts of sustainable transport policy Ipswich with regards to ease of access, attractiveness and shopping offer in the town centre. Generally, it can be seen that:

- There have been 4 main types of transport measures implemented in Ipswich (partial pedestrianisation, improved Park & Ride services, traffic restriction, public transport improvements and increased parking charges)
- There is a negative relationship to partial pedestrianisation and safety (in this case users cited the example of Upper Brook Street where the end of the pedestrianised core is reached and where buses are permitted)
- Partial pedestrianisation of the town centre has also had the effect of isolating the shops outside of the pedestrian core, which has a negative effect on the town centre as these shops are more likely to be discount stores, which cannot afford the higher rents that the core streets command
- Increased parking charges in the centre have encouraged shoppers to shop elsewhere at competing developments (a number of participants cited Colchester as a popular shopping destination because of cheaper parking)
- Pedestrianisation has brought about the emergence of a ‘café culture’ in Ipswich, which has boosted the appeal of the town centre

3.5 Oxford

The City of Oxford has a population of around 140,000 with a catchment area of between 0.5 and 1 million people. It is a 'young' city with 38,000 students and at 20% twice the national average of people aged between 16 and 24. In addition, Oxford is host to around 5 million visitors per year. Oxford is the seat of both Oxford City Council and Oxfordshire County Council, the latter being the Highway Authority. A large number of higher education facilities, including two Universities, are located in Oxford and dominate the land use pattern in the city. The considerable heritage value of the University has provided a major tourism industry which places considerable pressure on the city centre, given that development is constrained by the high proportion of historic buildings.

The city's manufacturing industry is dominated by car manufacturing, based in Cowley. The launch of the new Mini by BMW appears to have underpinned a revival of this sector.

Retail

In the retail hierarchy of centres, Oxford functions as a regional centre. The nearest major regional centres are Reading and Cheltenham. Apart from these, other competing centres are Banbury, Swindon and – to a lesser extent – Milton Keynes, all of which have seen substantial investment in the retail sector over recent years. The retail sector in central Oxford is dominated by comparison goods shops with few convenience goods shops and a comparatively low level of restaurant and other food and drink uses. The number of retail outlets in the city centre is relatively small for a city of this size at around 340 and constrained by the built form of the city centre with the presence of the colleges and the fact that a large proportion of the buildings are listed. For these reasons, there are generally very few vacancies and at the same time strong demand from retail operators to locate in Oxford. Therefore, rents in Oxford are among the highest in the country.

Transport Measures

The Oxford Transport Strategy was developed in 1993 in reaction to increasing transport pressures on the city centre and expectations of rising future traffic levels. The Oxford Transport Strategy consists of around 90 different individual measures. These were planned to be implemented over a period of initially 6 years, which was later extended to 9 years. The first few years into the strategy were dedicated to the implementation of measures that would reduce the traffic pressure on Oxford city centre. These included the extension and creation of Park & Ride sites, bus priority measures, capacity increases at ring road junctions, upgrading of bus services and cycle routes, as well as reducing the car parking space available in the city centre and improving pedestrian facilities.

Traffic restriction measures were introduced in the central area in June 1999. All through routes through the historic centre were blocked for car traffic and are now for access only. The most prominent features of the scheme were the complete pedestrianisation of Cornmarket Street (only making provision for cycles and deliveries in the evening and morning) and daytime access restrictions on High Street for cars. In addition, the western end of Broad Street has also been pedestrianised and a number of streets have been

designated as bus priority routes. To discourage diversion of traffic, complementary traffic calming measures have been undertaken in neighbouring East Oxford and in the Science Area.

Due to delays, the planned environmental improvement works on Cornmarket Street have only begun recently and will not be completed before spring 2002.

Figure 11: Cornmarket Street, Oxford



Source: TTR Ltd. 2001

The Data

The data for Oxford city centre shows a largely positive development: rising rents, continuing low yield, higher footfall (except for Cornmarket Street), higher public transport usage, higher car park usage, improved air quality. It however also indicates lower turnover among the retailers that are part of the City Centre Management's turnover monitoring panel. It has recently begun to rise substantially, though it has not yet reached 'before' levels again. Vacancy rates are traditionally very low in Oxford, but have recently started to rise, albeit in very modest proportions.

The Boots store was substantially extended in the 'after' year; a direct comparison is therefore difficult. Post-extension year-on-year sales figures were very positive for the first quarter of 2001/2, but slumped dramatically when the environmental improvement works began in June 2001.

The survey work commissioned by the Rescue Oxford (ROX) initiative¹¹¹² indicated a sharp reduction in takings among city centre retailers who participated in the survey. The data contained in the Lockwood Survey would suggest that Oxford city centre's recent performance is about average, similar to many other bigger centres. Oxford has consistently

¹¹ ROX - Rescue Oxford. 2001. *Newsletter*. March 2001

¹² ROX - Rescue Oxford. Press Release: "Make Oxford Friendlier" Say Retailers as New Survey Slams OTS for Failing the City. Accessed 20/08/01, www.dailyinfo.co.uk/polcaus/transport_strategy/oxtrans.html

been among the top five in the 'retail centre hierarchy' tables (based on yield figures) in the Property Market Reports of the Valuation Office and was at the top of the list in autumn 2000.

The Users

Shoppers are to some degree dissatisfied with the situation in Oxford; many stated they avoid Oxford city centre for certain types of shopping trips. The centre is perceived to be too busy and some think the types of shops are too exchangeable, whilst others think there are not enough national multiples. Similarly there were some that thought there are now too many cafés in the centres - for others there were not enough cafés. A possible explanation for this, and many aspects of the perceived malaise in Oxford, is that the city centre is dominated by the demands of students and tourists, leading to strong provision of pubs, restaurants and similar outlets. As a city, however, Oxford still has pockets of comparative urban deprivation, but the city centre, given high rent levels, lacks the low cost outlets which less affluent cities might offer.

Generally the criticisms were familiar and often reflect national developments, rather than just Oxford specific ones (e.g. the closure of small independent retailers, replaced by multiples, coffee shops or mobile phone shops, etc). There was however a clear indication that certain groups are more likely to shop elsewhere. These were predominantly those with small children, who find parts of Oxford city centre and many shops hard to access and those for whom it is important to be able to drive near where they want to shop and park there.

Criticism was not directed against the pedestrianisation element of the Oxford Transport Strategy, but against the parking pricing policy and some of the other access restrictions. The pedestrianisation was supported, but people were still very critical of the number of delivery vehicles and the lack of seating and trees. There was also dissatisfaction with the progress of the improvement works. Generally there was a feeling that Queen Street, which is a major through-route for buses, should also be fully pedestrianised.

Only a minority of the participants used the car to travel into Oxford for shopping; the most popular modes were walking, cycling and public transport. In so far, it can be assumed that the Oxford Transport Strategy achieves its objectives. However, the side-effect is that those who are not willing to switch from the car to the bus or another mode travel elsewhere to shop, often substantial distances.

To get an idea of the effectiveness of the consultation and public relations programme associated with the Oxford Transport Strategy, participants were asked whether they had been aware of the changes before they happened. For most respondents this appeared to be true for the major changes such as the pedestrianisation of Cornmarket Street and the closure of High Street.

The Professionals

The City Centre Manager thought that the pedestrianisation and the Oxford Transport Strategy would have a positive effect on the city centre in the longer term after a settling-in

phase. According to his experience, retailers are split in their views on the Oxford Transport Strategy, with many of the national multiples supporting the scheme, whilst many small independent retailers feel threatened by it. The City Centre Manager felt that central Oxford may lose some customers through the changes. These would probably come from among those that live in Oxfordshire, but at some distance from the city and for which it is as easy to go to Reading or elsewhere instead. He however expected that those living in or close to Oxford, as well as visitors from outside the County, would be unaffected.

Additional Sources

The retail performance study¹³ that was commissioned to address concerns over the retail sector compares Oxford's retail sector with that of four peer group towns and cities (Bath, Cambridge, Norwich, Worcester) and concludes that there is no indication that the Oxford Transport Strategy has had a negative impact on retailing in Oxford.

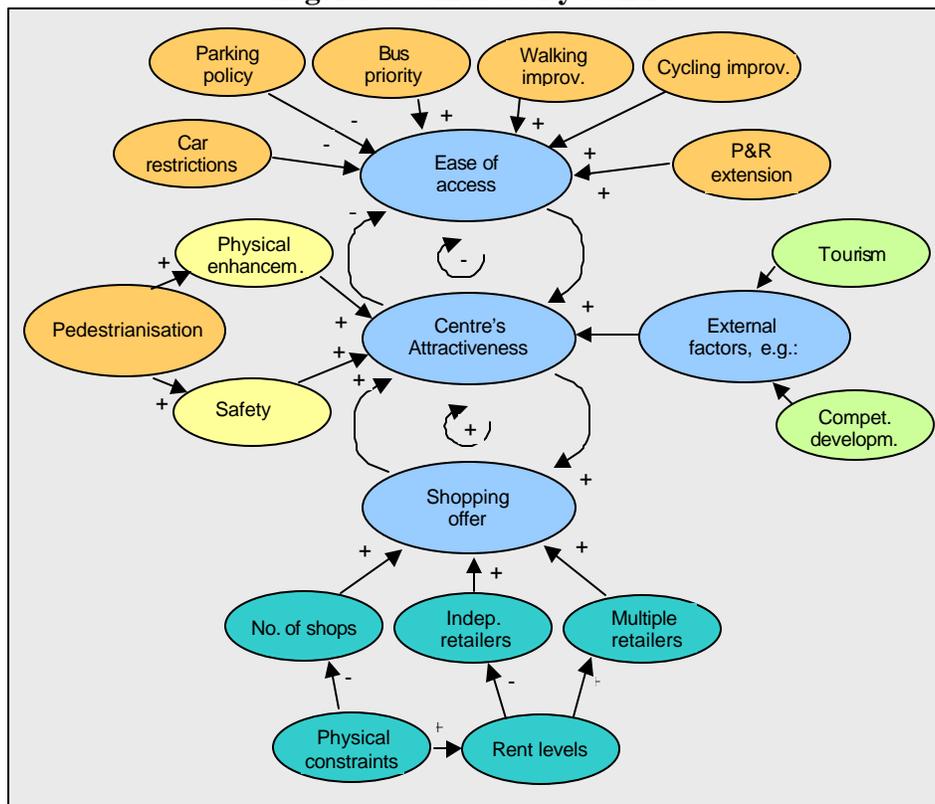
The Verdict

It is difficult to interpret the developments in the retail sector in Oxford on the basis of the different, sometimes contradictory, sources. The dramatic reductions in takings as described in the ROX survey are not substantiated by the Boots data or the data from the quantitative indicators, which both suggest a more balanced or even positive trend. The information gained from the manager of the Boots store on Cornmarket Street indicated thriving business for the first quarter of 2001/2. This is probably largely a result of new product ranges in the store, but could to some degree be ascribed to the effect of the pedestrianisation. For the following quarter, there was a dramatic slump in takings which coincided with the start of the environmental improvement works on Cornmarket Street. The effect of these works will probably be felt by most retailers along the Street. It can however be assumed that these negative effects will only be felt as long as the works are on-going.

The results of the group discussion can however be taken as a warning sign, as it seemed to be quite common among participants to avoid shopping in Oxford for a number of reasons, many of which were to some extent transport related. These participants were residents of Oxford, a group of which the City Centre Manager did not expect a 'withdrawal' from shopping in Oxford. The example of Oxford suggests that it is important that traffic restraint measures are combined with improvements in the shopping centres, e.g. environmental / landscaping improvements or an improved retail offer. There appears to be some frustration among users at the current retail offer, which is, as was also stressed by the City Centre Manager, very constrained. With the added barrier of high parking charges, this leads to the effect that some people may shop elsewhere instead. The completion of the enhancement of the newly pedestrianised areas as well as the provision of additional retail floorspace, as planned (e.g. the extension to the Westgate Centre) should however strengthen Oxford's retail function.

¹³ Oxfordshire County Council. 2001. *Oxford Retail Performance Study*. Carried out by CB Hillier Parker. July 2001

Figure 12: Causal Loop diagram showing the interrelationships of key factors with regard to Oxford City Centre



The causal loop diagram in Figure 12 shows how measures introduced as part of the Oxford Transport Strategy influence the centre’s attractiveness as a whole and which other factors are important in determining its performance. Generally, it can be seen that:

- there have been a wide range of transport measures which improved access to the centre by non-car modes. These were mainly bus priority measures, Park & Ride extension and improvements, measures that improve walking links and improved cycling infrastructure.
- there have been two main measures which reduce access to the centre by car, namely the pedestrianisation and partial pedestrianisation of city centre streets as well as other restrictions on car access and through traffic.
- the pedestrianisation contributes to the overall attractiveness of the centre by making it safer for shoppers and by enabling enhancements to the centre.
- there are two important external factors which have a strong influence on the health of the centre, one of which is Oxford’s role as a prime tourist destination. The other is competing development such as major retail investment in Reading.
- The historic built form of the centre imposes physical constraints which limit the availability of retail floor space and keep rents high. This impacts negatively on the shopping offer by limiting the overall number of shops and because the rental levels put pressure on independent retailers, which are seen as important to preserve a distinct retail character.

3.6 Sheffield

Sheffield is a leading regional city centre in the north of England with a population of around 500,000. As part of an Objective 1 designated area of South Yorkshire; Sheffield has many problems associated with the general industrial decline of the sub-region's coal industry and, more directly, of the city's steel industry. Sheffield One (one of the only three pilot Urban Regeneration Companies in England) has been tasked with spearheading the regeneration of Sheffield City Centre; part of this effort will be focused on transforming the range of shopping, leisure and cultural destinations.

Retail

Sheffield is classified as a major regional centre, as is the Meadowhall Regional Shopping Centre, its major competing neighbour which is located to the north of the city centre. Meadowhall draws its customers from a more extensive catchment area than the city centre and has overtaken the city centre in sales of clothing and footwear. In other categories, however, such as furniture, household goods, electrical and DIY goods, Sheffield city centre accounts for a much higher proportion of expenditure than Meadowhall. In the 1970s Sheffield was ranked amongst the top ten shopping centres in the country by total sales but is now no longer regarded as among the top northern centres. Other competing centres in the region include Doncaster and Wakefield. Within Sheffield itself, the two main shopping areas are Hillsborough to the north west of Sheffield and Crystal Peaks, built in the 1980s, which is located south east of the city centre.

A recent review and audit of Sheffield's current retail offer (see Sheffield One, 2000) and position in the retail hierarchy has confirmed that Sheffield's retail offer is neither keeping pace with other leading city centres such as Leeds, Manchester and Newcastle, nor keeping up with dynamic smaller places such as Nottingham and Leicester.

Transport Measures

The first phase of the Supertram from the city centre to the Meadowhall Regional Shopping Centre was opened in May 1994 for commercial operation. Phase two was opened later in 1994 to a temporary terminus, south of the city centre; it became fully operational in 1995. The Supertram comprises three lines, meeting in the city centre, one of which runs to Meadowhall. It covers a total track length of around 30 km, of which over half a mile passes through one of the most sensitive parts of the city. It passes through a conservation area, by a large number of listed buildings and through three city squares. One such square was Castle Square where the opportunity was seized to create a new pedestrianised square. The implementation of the Supertram did not however come without a price, the construction period of the Supertram lasted five years from 1990-95 and caused much disruption to the city centre.

Figure 13: The Sheffield Supertram



Source: TTR, Ltd. 2001

Prior to the operation of the Supertram, Castle Square comprised a large post war traffic roundabout with an extensive pedestrian subway network. This network had deteriorated into a series of dilapidated, vandalised and graffiti covered tunnels and the 1960s traffic layout had increasingly severed Haymarket and Angel Street from the core of the city centre. Structural failure of parts of the Square led to the decision of infilling it. This decision provided the opportunity to create a completely redesigned space and the opportunity to re-establish the pedestrian flows between Fargate and Haymarket. Much of this additional pedestrianisation is shared with the tramway, which enables the service to be segregated from other traffic within the pedestrian preference zone of the city centre. A bus service route now runs parallel to the Supertram route.

The Data

Rent levels were found to have decreased between 1990-98 in the city centre, which was attributed to the opening of Meadowhall. Similarly, during the same period yields increased whilst those of the major competing city centres such as Leeds, Manchester and Newcastle decreased. Between 1990-95, there was also a 5-year dip in sales, when some stores reported as much as a 30% drop in sales; this corresponds to the construction period of the Supertram. Turnover for the city centre is now thought to be on the increase, but, as the Masterplan Report, produced by regeneration agency Sheffield One shows, the city is still lagging way behind its competitors.

Footfall figures show that average pedestrian flows in the city centre fell by 40% between 1989-98. There were also more vacancies in the city centre in 1997 than in 1991 whereas vacancy rates in Meadowhall decreased. Retailer representation in the middle of the 1990s also indicated that Meadowhall was the preferred location. Between 1990 and 2000, four major department stores disappeared from the city centre, so that the number of department stores fell from five to one. Some of these stores relocated to Meadowhall. All of these indicators are in line with the findings of the Lockwood Survey, which found that the majority of stores had takings which were below inflation and declining, but in 2000, takings reportedly improved.

Boots data also reveals a major decrease in average weekly turnover between 1991/2-1997/8 at both The Moor and High Street stores, despite there being no significant changes in inventory. The store manager at The Moor store attributed the fall in sales figures to a combination of the introduction of the Supertram and the Meadowhall development. In his opinion the Supertram had enabled easier access to Meadowhall.

The Users

The majority of participants in the focus group discussion found that the one way system in Sheffield was confusing and contributed to traffic congestion in the city centre. Controlled access within the city centre itself also exacerbated this problem, as many drivers did not know where they were allowed to go. They also felt that parking in the city centre was very expensive. The price of parking also constrained the number and variety of shops that car drivers could visit. These factors presented a major deterrent to shopping in the city centre amongst the car drivers and encouraged them to shop elsewhere, most notably at Meadowhall where it is more convenient and free to park.

There were fears about the security of car parks around the city centre, especially for Park and Ride services. Many participants maintained that travelling by car was still more convenient and argued that Park and Ride was more useful for people living outside Sheffield. The entire group also showed concern over the decline of Sheffield in recent years both in terms of the quality and appearance of shops, adding that Meadowhall offered a much higher standard of shops.

Many participants expressed a willingness to use the Supertram or train services into the city centre but none of them lived near to any of the tram routes or train stations. Controlled access for buses has meant that it is now more difficult to get to the shops, as the buses no longer stop outside the shops. Safety was also a big concern for shoppers, as they did not like the subways and the fact that the tramways are not segregated from the pedestrian areas. They also felt that the pedestrianised streets had encouraged more skateboarders and youths during the day. Security of parking and storage facilities was also a major concern of the cyclists within the group as well as the condition of cycle lanes.

The Professionals

The construction period of the tram lasted 5 years and caused a major disruption to the city centre but officers believed that the associated works, such as improvements to the pedestrian environment, were positive outcomes. Meadowhall was held as a strong threat to the city centre which hit the city centre at a time of recession. The combination of these three factors has meant that since the early 1990s, vacancy rates in the city centre have gone up, pedestrian flows have decreased and turnover has gone down. Many studies had been carried out prior to the opening of Meadowhall but there have been no 'after' studies to compare the results. Similarly, there have not been any studies to assess the impact of the Supertram on the retail performance of the city centre.

Although access to commercial data of the shops in the city centre is hard to obtain, the turnover of the main department store is seen as a good barometer of city centre performance.

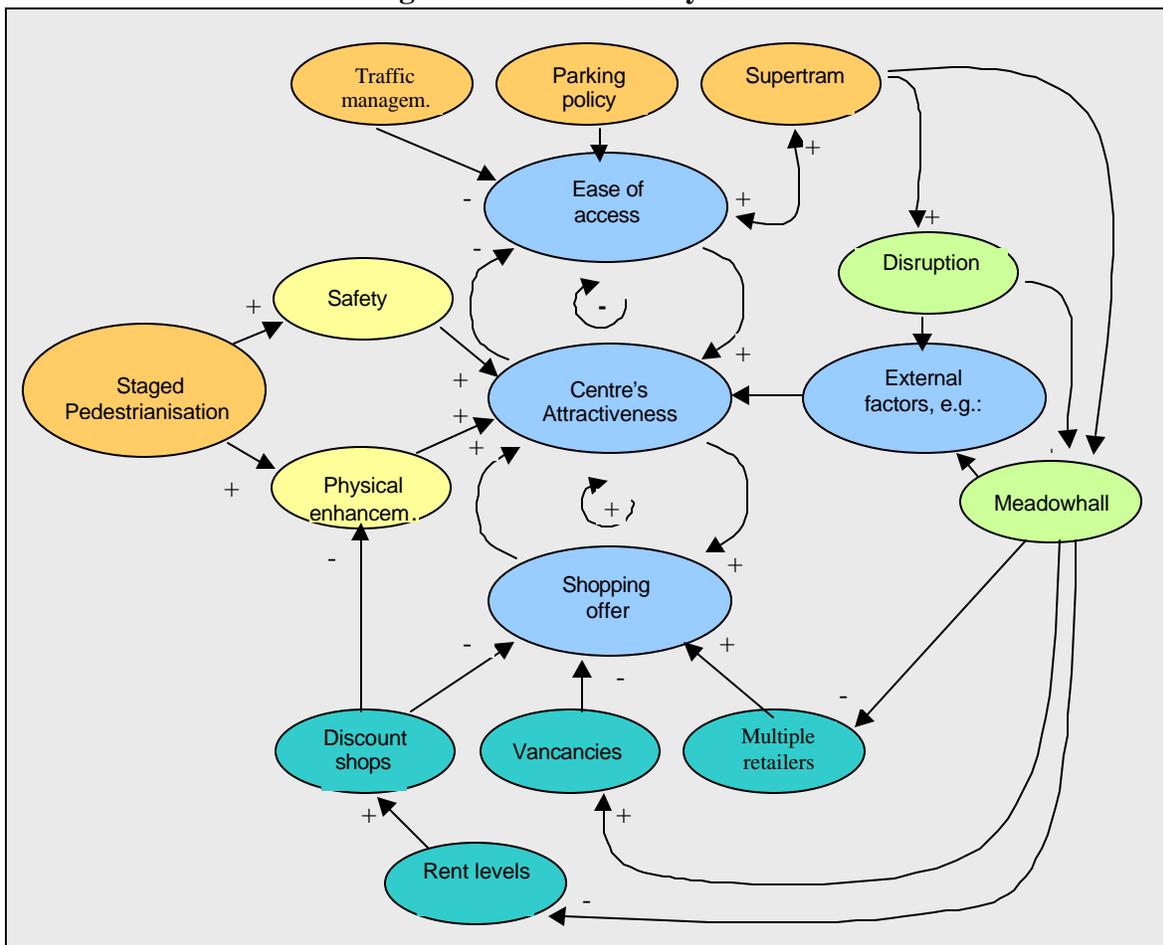
Figures show that turnover has gradually been picking up since the mid 1990s but this is not happening at a significant rate. It is hoped that the new retail quarter, set out in the Masterplan Report, will help the performance of the city centre by creating more small and medium sized shops.

The Verdict

It is virtually impossible to isolate the long-term effect that the Supertram and pedestrianisation measures have had on city centre performance in Sheffield. This is owing to the fact that it coincided with the opening of Meadowhall and also because the construction period for the tram lasted 5 years and caused much disruption to the city centre. Monitoring data for before and after periods are therefore measured over an elongated period. The indicators available give a negative picture of retail performance since the beginning of the 1990s, and although there are recent signs of improvements, these are relatively slight.

Furthermore, focus group participants immediately pointed out the declining quality of Sheffield city centre, particularly with regards to the disappearance of department stores and the emergence of numerous discount stores.

Figure 14: Causal Loop diagram showing the interrelationships of key factors with regards to Sheffield City Centre



The causal loop diagram in Figure 14 provides an overview of the impact of sustainable transport policies with regard to ease of access, attractiveness and shopping offer in Sheffield. It can be seen that:

- There have been four main types of transport measures. These have included, traffic management, increased parking charges, the implementation of the Supertram and pedestrianisation, which has occurred at different time periods
- There are two significant external factors, which have had huge impacts on city centre measures; these have been the construction of Meadow hall and the disruption caused by the Supertram construction process.
- The Supertram and the disruption that it caused, during the implementation period, has caused many shoppers to shop at Meadowhall (this is depicted by positive links in the causal loop diagram)
- Meadowhall has had a negative effect on rent levels in the city centre and on the presence of multiple retailers. In the first instance rent levels have decreased and secondly, multiple retailers have relocated to Meadowhall. This has enabled discount stores to locate in the city centre by taking advantage of cheap rents and vacant units
- The shopping offer in Sheffield is not as strong as shown in the causal loops for other case study areas. This is as a result of the increased vacancies and emergence of discount shops (both giving negative links to the shopping offer loop).
- Increased vacancies and the emergence of discount shops also have had a negative effect on the attractiveness of the city centre; this has been detrimental to any physical enhancement brought about through pedestrianisation.

3.7 Winchester

Winchester is a historic city with a population of around 35,000. It is located around 15 miles from Southampton and is the seat of Hampshire County Council as well as Winchester City Council. The County Council is the largest local employer. Winchester is an important tourist destination due to its historic importance and its cathedral. A dominant feature in the city centre is the historic King Alfred's College. There is a student population of around 3000 in the city.

Retail

Winchester is classified as a 'sub-regional' centre in the national retail hierarchy of centres, the nearest 'major regional' and 'regional' centres are Southampton, Salisbury and Portsmouth. Southampton's retail position was strengthened significantly in 2000, when the West Quay shopping centre opened. The main shopping area of Winchester is relatively confined with the majority of shops being located in High Street. Most of the shops are in historic buildings, but to the north of High Street there are some more recent retail units; a modern shopping centre – 'The Brooks' – and a purpose build precinct opposite it. There are no retail warehouse parks or similar large scale out-of town retail outlets which sell comparison goods apart from supermarkets in or in the immediate vicinity of Winchester, but there is a retail park at Hedge End, north-east of Southampton.

Transport Measures

The Winchester Movement and Access Plan (WMAP) was initiated in 1989 as a joint project of the City and County Councils in response to growing demand for travel. Further road building was rejected as a solution, as it did not appear to be technically appropriate or politically achievable. The strategy first received support from the national government in 1994/95. It was set out to have a 10 year life-span: 1994-2004. WMAP aims to provide improved infrastructure for public transport, cycling and pedestrians and to manage demand for access by car. Its vision is to create a city with pedestrian priority throughout, with good accessibility maintained by public transport and a network of on-and off-road cycle routes.

Park & Ride and the designation of a Special Parking Area are key elements of the strategy. The provision of a second P& R site, which is a cornerstone of the strategy, was delayed. As a result, in 1997/98 and 1998/99, an increased emphasis was put on measures facilitating pedestrian and cyclist movement and making it safer, as well as improving access for people with mobility impairments. Demand management measures were also introduced. A large scale Controlled Parking Zone was introduced in 1996/97 and reviewed in 1997/98. In 1999, the western end of High Street and Jewry Street, a main through route, were narrowed from two lanes to one lane of traffic with the gained space given over to pedestrians. Traffic calming was introduced in many residential streets to prevent rat-running and improve safety.

WMAP targets are a 20% reduction in traffic levels by 2020 in the WMAP area (against a 1998 base), to increase use of public transport by 50%, to increase walking by 40% and to increase cycling in line with the national target (i.e. quadruple 1996 levels by 2012).

Figure 15: Narrowed High Street, Winchester



Source: TTR Ltd. 2001

The Data

No immediate conclusions can be drawn from the data that is available for Winchester, but it indicates a slightly negative trend. Car park usage and footfall were down; in the case of footfall dramatically (around –20% from 1999 to 2001). This could be partly due to the fact that the weather on the Friday in both 2000 and 2001 was not good (overcast with showers), but the figures are not much better for the Saturdays, when the weather was better. The 2001 figures could also be affected by the reduction in tourist numbers which occurred as a result of the foot & mouth crisis according to the City Centre Manager. The pedestrian flow figures are at odds with the perception of the users as expressed in the group discussion, which stated that the centre is generally very busy, as well as the impression gained by the study team when visiting Winchester. Both at weekdays and weekends, the High Street appeared to be very busy. The city centre manager also did not perceive a dramatic reduction in footfall.

Boots turnover decreased by a substantial amount, although this is seen to be a result of the closure of its ‘cookshop’ and external competition. The vacancy rate in the centre stayed the same, not counting the units in the relatively new Brooks Centre. When the Brooks Centre is included, vacancies have decreased. The focus of vacancies within the centre has however shifted. While vacancies are going down in Broadway (3 → 1) and Jewry Street (4 → 1), the King’s Walk Arcade and surrounding area appears to be in decline as indicated by a rise in vacancies (1 → 4). The improvements with regard to vacancies on Broadway and Jewry Street could well be linked to the environmental enhancements and the reduced traffic levels that followed the introduction of transport measures on these roads. The increase in vacancies in and around the King’s Walk Arcade is in one case due to relocation to the Brooks Centre.

The Users

Participants in the group discussion liked the centre of Winchester and were reasonably happy with Winchester as a shopping destination. They found however that the mid-range retail offer they are interested in has been decreasing over the last years, whilst new shops tended to cover the top and bottom ends of the market. They all also used other shopping centres. There was general agreement that Winchester city centre is very busy at most times and that it can be difficult to find car parking spaces in convenient locations. This seems to contradict the results of the footfall surveys, which indicate much reduced pedestrian flow figures.

The key characteristic participants liked about Winchester was that a large part of the centre is pedestrianised, which makes the stay pleasant and enables outside seating at food and drink outlets and encourages activities such as busking. Participants were however not aware that the more recent changes in the transport system are all part of one strategy. They tended to look at each measure as a separate development, therefore they were surprised to be asked about comprehensive recent changes. The implicit objective of WMAP though, to reduce car traffic in the centre of Winchester, by reducing road capacity and making access more difficult, but not impossible, was sensed by some of the participants who felt that car users were not encouraged to travel into the centre.

Nevertheless, the car was still the dominant mode respondents used to access the centre. This was despite the fact that some acknowledged that they personally could use another mode, usually walk. Public transport received bad marks in Winchester, it was seen as inconvenient and too expensive.

The Professionals

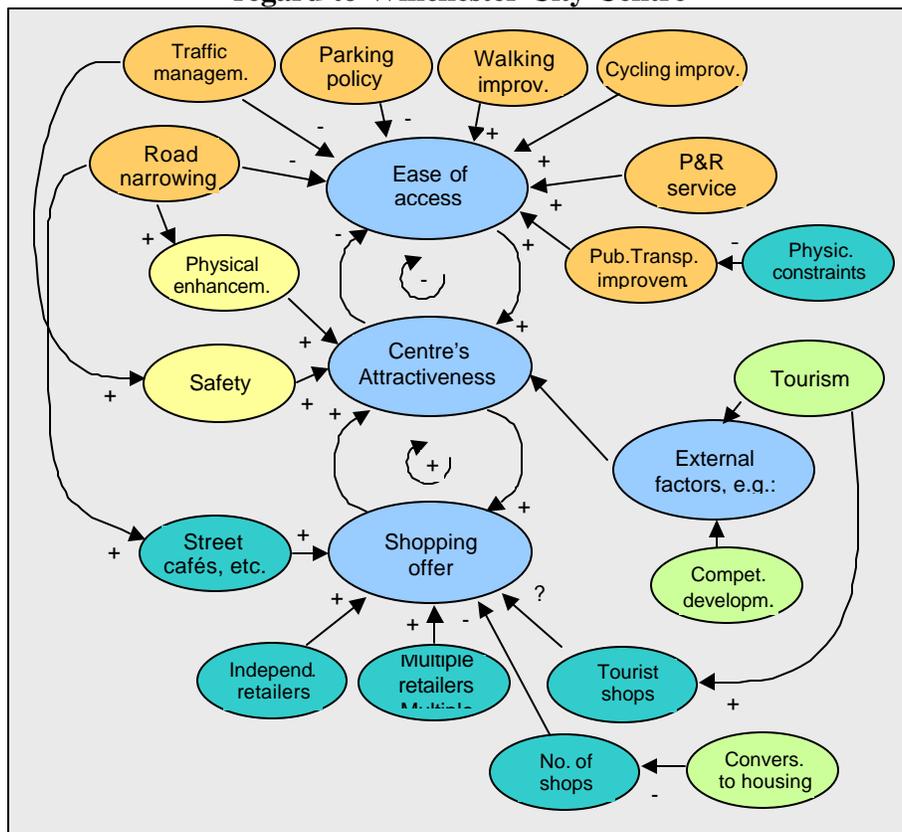
The City Centre Manager thought that retail conditions in Winchester were slightly difficult at present, as it had been hit to some extent by the recent Foot & Mouth crisis. The impression was however that this effect was the same in other small towns and cities. He compared the performance of retailers in Winchester and Salisbury which is in a similar situation and said that Winchester was hit less badly by the general downturn in expenditure than Salisbury. He also stated that Winchester was less hit than was feared by some by the opening of the West Quay centre in Southampton. He suggested that the shopping experience in both places was so different that they do not really compete with each other.

The Transport Area Strategy Manager felt that WMAP was successful in achieving its car traffic reduction aims and that it made the centre much more pedestrian and cycle friendly. He said that at the heart of the strategy was the idea not to prevent cars from getting anywhere, but just to make it a little bit more inconvenient, to the advantage of other modes. He felt that most of the retailers in Winchester tended to oppose proposals at first when they are introduced, but appreciated most developments later on. There was no significant opposition to the large-scale reduction of free on-street parking spaces and most traders, where there are still on-street spaces would not mind to see them go, if that meant that it would be possible to have outside seating, wider pavements, etc.

The Verdict

It appears that the incremental approach to the transport strategy for Winchester taken by Hampshire County Council has been successful in obtaining public and retailer acceptance as well as achieving many of its transport objectives. Hampshire County Council was in a comparatively advantageous position due to the fact that traffic restraint has a long history in Winchester, going back to the 1970s, when the core part of High Street was pedestrianised and the one-way system was introduced. The retail sector in Winchester appears reasonably healthy but the yield figures would suggest that Winchester has lost its position among the top most lucrative UK shopping centres. However, yield is calculated on the basis of actual property transactions, which means for a small centre like Winchester that the figure could be derived from a very small number of transactions. This means that the average figure can easily be distorted. The yield could also be affected by the increased availability of retail floorspace following the opening of the Brooks Centre. From the interviews and the group discussion it would appear that this trend for yield is not related to the changes in the transport system.

Figure 16: Causal Loop diagram showing the interrelationships of key factors with regard to Winchester City Centre



The Causal Loop in Figure 16 shows how elements implemented as part of the Winchester Movement and Access Plan impact in different ways on the city centre and which other factors play an important role. It can be seen that

- there are a number of measures that reduce access to the centre by car, including road narrowing, traffic management and parking policies. These are however relatively mild and do not pose a severe disincentive to travel to the centre by car.
- these are complemented by a variety of measures that improve access by other means, mainly walking, cycling and Park & Ride provision. There are also attempts to improve public transport, but these are limited through the physical constraints of the historic centre which reduce scope for bus priority measures.
- the ‘car-taming’ measures improve the perception of safety and allow physical enhancements of the centre and widened pavements enable use for outside seating.
- external influences on Winchester city centre are mainly tourism, which forms an important part of the economy and competing developments, mainly the West Quay development in Southampton.
- the shopping offer is made up of independent and multiple retailers, but includes an increasing number of shops that are considered as tourism related. These enhance the shopping offer for visitors, whilst this development is seen as undesirable from local shoppers viewpoint. The shopping offer is also threatened by an increasing number of shops in peripheral parts of the centre that are converted to housing, due to the enormous pressures in Winchester’s housing market.

4 ANALYSIS: COMMON FACTORS, DIFFERENCES AND KEY INFLUENCES

4.1 Did the transport measures achieve a change in behaviour?

Achieving a move towards more sustainable travel is a more or less explicit objective of transport policy underlying all the measures covered by our case studies. Whilst for many local authorities the primary concern is to persuade commuters to travel less by car, it is in most cases also considered as desirable that shoppers and other town centre users do the same. However, the emphasis is often on ‘enabling’ these groups to do so, rather than to provide disincentives.

To assess the actual extent to which the transport measures in the case studies have caused shoppers to change the way they travel into the centre it would be necessary to have ‘before’ and ‘after’ mode split data for journeys into the centre for shopping purposes. Data that meets these specific requirements is not available. Therefore we have to rely on mode split data covering all journey purposes where that is available and otherwise draw cautious conclusions from the findings of the group discussions, which of course can only be taken as an indication.

Historically, the image of Birmingham city centre is of congestion and segregation characterised by road and subways. The centre now sees significant interchange between local bus and rail services servicing large parts of the conurbation and hinterland. Cross-city train services opened in the early 1980s have been improved to feature Train and Ride services with free car parks at most stops. Bus based Park & Ride services has also been improved: radial and cross city bus routes have been upgraded to include a new Showcase service and 30km of bus lanes have been installed over the last 5 years, helping improve reliability and efficiency of services. Furthermore, the City Centre Manager said that even though at one point the city council were criticised for being ‘anti-car,’ policies are now less stringent and new development in the city centre is set to provide adequate parking. As a consequence of these sustainable transport policies, the recent visitors survey conducted in the city centre¹⁴ revealed that well over half of the visits to the city centre are made by public transport (mainly bus, coach or train). Many of those with regular access to a car choose public transport to visit the city centre. Around a quarter of trips into the city centre are by car and two thirds of cars users are accompanied by at least one other person. The survey also found that car and particularly train usage increase with distance as bus patronage declines but only 50% of regular users from the outer areas of the Birmingham region travel in by car. The commuters amongst the focus groups participants, seemed to use shop in the city centre during the week, as part of their lunch hour, and many of these used the train to get to get to work. With regards to weekends, they would not consider to using the bus to travel into the centre to do their shopping as recent changes to services had made travelling by bus very confusing. The group did not seem to have any complaints about the cost of parking many

¹⁴ Birmingham City Council. March 1999. ‘Birmingham City Centre: Users and Their Views,’ Birmingham City Council

and did experience problems with finding parking spaces. Despite this most preferred to travel to other shopping destinations because they perceived the city centre to be too crowded at weekends. The roads and large roundabouts were major deterrents to cycling into the centre to go shopping. It would appear therefore that the car, as can be implied from past impressions of the city centre, no longer dominates travel into the city centre. The travel data suggests that the trains seem to be a popular mode of travel to the city centre in Birmingham, and even though the bus was not popular amongst the commuters in the focus group, the data also suggests that the majority of visitors use public transport to do their shopping.

In Edinburgh, the focus group discussions revealed that the cost of parking in the city centre acted as strong deterrent to driving into the city centre for shopping purposes. Similarly, travel data supports the view that the car travel for shopping trips has declined. The City Council has conducted two surveys of shoppers behaviour in Edinburgh; the first survey was conducted in 1985¹⁵, and the second survey was published in October 2000¹⁶. The latter survey shows that since the first survey date, the city centre has witnessed a big increase in the percentage of shoppers arriving by foot, and a significant increase in the use of the train. Furthermore, the proportion of shoppers who travel by car has declined substantially. The survey has also found that there has been a decline in bus usage but sustainable modes of transport as a whole (public, transport, walking and cycling) now accounts for two-thirds of shoppers' travel into the city centre. Ironically, a few members of the focus group stated that they took advantage of recent changes in the bus services to travel to alternative shopping destinations in the city centre, like the Gyle.

The pedestrianisation of George Street in Hove was primarily intended to help regenerate the area, but was also seen as a means to encourage more sustainable travel. There is no relevant mode split data on this issue, but the findings of the focus group suggested that this objective has not been achieved. The majority of participants still use the car to travel to George Street, the only difference being that they now have to walk from where they parked to the pedestrianised area. There was some indication of increased public transport use, but this was as a result of the simplification and reduction of bus fares, rather than the pedestrianisation scheme. Similarly, one participant also stated to use the bicycle more, but this was due to improved cycling infrastructure.

Although there have been no specific surveys to show how shoppers travel to Ipswich town centre, screenline counts show that car travel has decreased slightly between 1995-2000, but this is for all types of journeys, during peak hours. The Borough Engineer explained that there were a series of comprehensive transport strategies for Ipswich under the TPP and LTP Programmes. These had brought about considerable improvements in travel (i.e. bus priority and service improvements, improvements to rail services and measures to encourage walking and cycling as part of the Travelwise campaign), which had provided strong incentives to switch from the car to other forms of travel. The focus group participants indicated, however, that restrictive measures such as increased parking fares made them more likely to shop elsewhere, rather than using the bus to travel into the centre. Although the majority of participants said that they did not use buses, they said that if fares were cheaper they would

¹⁵ City of Edinburgh Council. 'Draft Retail Strategy for Edinburgh City Centre,' A report to the Economic Development Committee of the City of Edinburgh Council, 12 October 1998

¹⁶ City of Edinburgh Council. October 2000. 'Edinburgh and Lothian Shopping Surveys'

definitely consider using the bus. Park and Ride services seemed to cause much confusion as to their purpose, as participants concluded that they would have to travel out of the town in order to use them. They thought therefore that they were of more benefit to users from outside the town. Lack of cycle spaces and theft were the main reasons why the group would not consider cycling into the town centre.

Mode split data for Oxford indicates a significant reduction in journeys into the centre that are undertaken by car and a corresponding rise in journeys by public transport. The findings of the focus group also support this picture. Only very few participants stated they would often drive into the centre for shopping purposes. It can therefore be concluded that the Oxford Transport Strategy has led to some move towards more sustainable travel modes among shoppers. It also appears that it led to some diversion of shopping trips by car that would normally have ended in the centre to competing centres.

Modal split data for Sheffield, produced for the LTP in 2000, shows that travel by private vehicle has reduced slightly between 1995-2000, bus travel has decreased and tram usage has begun to increase. The Masterplan Report by Sheffield One¹⁷ addresses the weakness of the bus service within the central area. The study suggests that this issue be addressed by the creation of a new inner-city bus service running on an inner-loop connecting the ring of emerging central area neighbourhoods with the Midland Station, Supertram and the regenerated city core. It also notes the difficulties of access by car and states that reconsideration of the complex and confusing one-way system is a priority for action. Unsurprisingly, confusing traffic arrangements, high parking charges and lack of parking spaces were the main points of contention during the focus group discussions. These three factors resulted in the majority of participants feeling that it was easier to shop at Meadowhall. With regards to public transport, none of the group used the tram, as it did not serve the area where they lived and buses were too expensive. The quality of cycle routes and storage facilities were the main reasons for participants not choosing to cycle into the city centre. As was the case in Ipswich, the travel data referred to for Sheffield is not exclusively for travel into the city centre for shopping purposes. Under this circumstance, and the lack of before and after data, it is not possible to say if the transport policy in Sheffield has encouraged shoppers to change their travel habits. It would seem, using the focus group discussions, as a basis that shoppers in Sheffield find it easier to travel to Meadowhall than try to access the city centre.

Mode split data for Winchester excludes journeys under one mile and is therefore, because of the small size of the city, likely to understate the importance of walking and cycling. For shopping journeys into the city centre, it is hence likely to be misrepresentative. The focus group participants expressed a preference for travelling into the centre by car, despite acknowledging that they could use other modes. Participants in this focus group however were very homogenous and are unsuitable to give an indication of travel behaviour more generally.

¹⁷ Sheffield One. December 2000. 'Sheffield City Centre Masterplan Report,' Sheffield One.

4.2 What was the influence of the transport measures on the relative success of the centre?

Birmingham city centre has been subject to many positive changes over the last decade, which will all have had an effect on the performance of shops in central Birmingham. Due to the lack of quantitative data for the periods around both the first and second phases of pedestrianisation, we have to base our judgement on how far the positive developments were triggered by the pedestrianisation schemes, largely on the views of the users. The focus group participants felt extremely positive about the effect the pedestrianisation has had on the city centre. Ironically, the main criticism was that as a result of pedestrianisation, the city centre has become almost too popular. This has had the effect of making the streets too crowded so that some users chose to visit less attractive, but less crowded shopping destinations instead. Whilst the role of city centre redevelopment in attracting more people into Birmingham cannot be ignored, it can cautiously be concluded that the extensive pedestrianisation in central Birmingham has had a positive impact on the retail sector, through raising the overall environmental quality of the shopping area and attracting visitors to the new developments into the shopping area.

According to the participants of the focus group and the Edinburgh Council officers, the widening of the pavements in Princes Street has led to an increase in pedestrian flows to the extent that the widened pavements have now also reached their capacity. This would normally suggest that there has also been an increase in retail activity, as this is seen to be closely linked to footfall. This was not reflected in the turnover data for the Boots store on Princes Street, but there could be several reasons for this, some of which are internal to the store. The main reason why local shoppers were dissatisfied with Princes Street, was due to the fact that they found the shopping offer unattractive, with too few distinctive shops, and that they thought the area's appearance is getting more run down. It is not possible to determine the impact of the transport measures along Princes Street on the retail sector with certainty, but it is likely that the effect was neutral to possibly slightly positive. Edinburgh is also, similar to Oxford, in the respect that there have been elements of car restriction, but the centres have not had any major physical enhancement measures implemented. Although these are planned for Oxford, Princes Street in Edinburgh has not had the sort of improvements seen on the Royal Mile. The Borough Council in Ipswich maintain that support for, and the success of pedestrianisation in the town centre, has been due to the quality of the streetscape and the high priority placed on maintaining it to a high standard.

George Street, Hove's traditional shopping centre, had been in decline for a number of years when the pedestrianisation scheme was implemented. The quantitative data that was available does not present a clear picture, but judging from the views of shoppers, which were shared by professionals, the overall impact of the scheme on the trading of shops and other uses along the street can be regarded as slightly positive.

Ipswich appears to be a successful retail centre, despite the fact that quantitative indicators did not immediately show improvements. It seems to be likely that the earlier pedestrianisation measures along Westgate/Tavern Street appear to have had a positive impact and have acted as a catalyst to attracting in mainstream multiples; this area is now referred to as the 'Golden Mile.' Interestingly, Carr Street and the eastern part of the town

centre, illustrates to some extent the situation before pedestrianisation was implemented, as Ipswich suffered quite severely from the recession in the 1990s, shown by the fact that the Buttermarket Shopping Centre (opened in 1992) has never been fully occupied. The eastern part of town is regarded as the 'cheap end' as the majority of discount stores and many vacant units are located here. Although Carr Street is also pedestrianised, it is separated from the pedestrianised core by Upper Brook Street, which still carries traffic. The traffic along this street creates such a bad environment for shoppers that it effectively acts as a boundary, over which the majority of shoppers do not venture. Upper Brook Street is now subject to an experimental traffic restriction scheme, although it does not apply to buses. It now remains to be seen if the pedestrianisation of the Butter Market and traffic restrictions along Upper Brook Street will attract more shops, and therefore more shoppers, in the Butter Market itself and the eastern end of town, so that they may share the evident success of Westgate/Tavern Street.

Oxford city centre scores well in terms of vitality as well as viability indicators, but users of the centre expressed many criticisms. An important reason for the discontent of users in Oxford is that the shopping offer is seen as not sufficiently attractive and that the centre is too crowded. There is also frustration about various transport related issues such as parking pricing, congestion and the number of buses going through the central area. The pedestrianisation measures were however seen as positive and, if anything, the criticism was that they did not go far enough. As in Ipswich though, there seem to be grounds for concern regarding the performance of the more peripheral areas in the centre following the implementation of the Oxford Transport Strategy. Overall it does not yet appear to be possible to assess the impact of the Oxford Transport Strategy on central Oxford's retail performance.

The problems that Sheffield's centre has been experiencing and which are reflected in users' views as well as the quantitative data available are likely to stem from a number of reasons. The most important change that negatively affected central Sheffield was undoubtedly the opening of the Meadowhall shopping centre. This makes it difficult to determine the effect of other changes that coincided with it. The timing of the introduction of the supertram however may have made a difficult situation worse. As was stated by retail professionals, the disruption caused by the building of the supertram added to the losses in turnover that occurred during that period. This effect of works related to transport measures was also experienced in other case studies, where the duration of the disruption was much shorter than in Sheffield. The supertram in general was viewed positively; it is however also claimed that, because the it also serves Meadowhall, it contributed directly to reducing the numbers of customers of city centre shops by making it easier to get to Meadowhall. Another criticism raised with regard to transport measures was that through the pedestrianisation of the main shopping areas, which also excluded buses, access to the shops has become more inconvenient. This is a relatively uncommon complaint related to pedestrianisation schemes in general, but one which remains significant. The importance of this issue has been recognised in Sheffield and are part of a package of measures proposed in the Masterplan Report by the regeneration company Sheffield One. Whereas it is not possible to quantify the magnitude of the impact the building of the supertram and associated measures has had on the retail sector in central Sheffield it can be assumed that the timing and routing may have added to problems evolving at the time.

The Winchester Movement and Access Plan follows a stepwise approach which appears as a logical consequence from the city's long history in traffic management and is therefore not seen to result in dramatic changes in the centre's transport system. Neither the retail professionals nor the shoppers regarded the transport measures as a significant influence in the retail core's performance. There are however signs that recent measures did help to regenerate a peripheral area of the centre, which used to be cut off by a very busy road, which has now been 'tamed'. An indication of this is the dramatic reduction in vacant properties in that area.

4.3 Which retail centres can be considered as successful?

Figure 17 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 17: 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>	-	+

It can be seen that while Oxford was a strong performer according to many of the quantitative indicators we looked at, the response from the focus group participants was not so positive. In contrast, the situation for Winchester and Hove is nearly a mirror image of this; whilst both centres were highly rated by users, their performance looked less impressive when measured through quantitative indicators. In only two cases were user views and quantitative indicators very consistent. This is true for Birmingham, where both sources indicated a healthy and successful centre and for Sheffield, where there seems to be no doubt that the centre was struggling. In the case of Birmingham, the quantitative indicators do not directly correspond with the 'before' and 'after' periods of the two pedestrianisation phases, as the respective data was not available. Instead, it was necessary to look at the general trend over the period between the two phases of pedestrianisation.

It has to be borne in mind, that, whilst the quantitative indicators, with the exception of Birmingham, reflect the periods before and after the implementation of transport measures

relatively accurately, the views of the focus group participants may have been influenced to some degree by how they feel about the respective centre today. In some cases considerable time has passed since the implementation of the measures or, in the case of Birmingham, they were introduced in phases, so that the views of the users may not be as accurate regarding the timing. In the cases where measures were introduced relatively recently like Edinburgh, Oxford, Hove and Winchester, this is less relevant.

With regard to those centres where there is a clear discrepancy between their performance in terms of viability indicators like yield and rent and users' views, one cannot completely discount the possibility that this may partly be caused by a time-delay inherent in such indicators. In the light of these findings we may have to question the use of one specific 'after' year for all indicators. Instead, it may be useful to measure those indicators that take some time to show change, for example yield, rent, retailer representation, after a longer period from implementation (for example up to 2 years). This however would inevitably also increase the 'background noise' influencing these indicators.

Even if we assumed that viability indicators might take longer to show changes, it is unlikely that they would deteriorate significantly for Oxford or Edinburgh in the short term. This is because of the two centres' traditionally strong position which is influenced by their function as major tourist destinations and, particularly in Oxford's case, by the constraints which limit the amount of retail floorspace available.

It is acknowledged that the qualitative findings are based on the views of a small number of people and may not reflect the views of local shoppers as a whole - however, if the relative discontent that local shoppers expressed in the focus group discussions regarding both Oxford and Edinburgh centres were found to be widespread, this needs to be taken seriously. Local shoppers constitute a more reliable and sustainable customer base than tourists do and centres will need to monitor how these in particular respond to changes.

The case study data collected for Ipswich also resulted in a somewhat inconclusive picture. The quantitative indicators portrayed a very different situation to the perception of the centre given by the users, in the year immediately following the pedestrianisation. It is likely this is in part due to the time-delay factor referred to earlier. Despite this, however, Ipswich still shows signs of inconsistencies. Data shows low yields and strong rental growth, so that it now matches shoppers' perception of the centre (in both the Attitude Survey and the focus group discussion, shoppers were generally pleased with the town centre. Furthermore, the consensus of the focus group participants was that the shops in Ipswich were improving as a result of the emergence of good quality mainstream multiples). Whilst this would suggest strong retail performance, other data (i.e turnover and vacancies) portray a more negative picture. This can be attributed to methods of data collection which aggregate figures for the town centre as a whole, which in this case includes parts of the town that are isolated from the main core, and are less successful.

5 CONCLUSIONS

5.1 Introduction

The purpose of this section is to draw out conclusions from the analysis section of the study. The conclusions are, where possible, illustrated with examples from the case studies to ensure a realistic perspective. In order to present a systematic approach, this section will firstly draw conclusions from the specific case studies considered in the study. Secondly, it will summarise the key issues which need to be taken into consideration, when formulating and implementing transport policy, in order to ensure that impacts are beneficial rather than detrimental to retail performance. Finally, the implications of these are considered for both large and small centres.

5.2 Conclusions from Case Studies

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 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 relative dependence on the car is unsurprising given the need for shoppers to convey goods and, often, children. The use of the car by shoppers may be further reinforced by parking policies which focus on curbing peak hour demand, this releasing spaces for short stay purposes later in the day. 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.

5.3 Key issues affecting how transport measures impact on the travel behaviour of shoppers and the retail sector

Whilst it is concluded above that sustainable transport measures per se do not have a substantial negative or positive impact upon the travel behaviour of shoppers, or the performance of the retail sector, the study identified a very wide range of issues which are of importance in influencing individual behaviour, and which should be reflected in policy formulation and implementation.

From the findings of the case study work, it appears that the type of transport measures implemented plays a very important part in determining the impact that transport measures have on the travel behaviour, and attitudes, of shoppers and consequently the performance of the retail centre. These can broadly be categorised into three types of measure:

- Traffic Management (i.e. restricted access)
- Improvements to access to the centre
- Physical enhancement

Most of the case study areas have decided to implement a type of traffic management measure, which has usually involved some form of restricted access for cars. This type of

measures may have involved changing the road system layout or revising parking policies. In addition to traffic management measures, local authorities may also have chosen to improve access to the city centre, for example, through improvements to public transport services, and in the case of Sheffield, the construction of a tram system. The third type of measure implemented in the case study areas are measures designed to improve the ease and attractiveness of using the centre, so that the shoppers feel that there is a benefit to shopping in the centre rather than elsewhere. To illustrate this point, the pedestrianisation along New Street in Birmingham now provides a high quality physical environment, where shoppers feel safe.

Figure 18 below sets out the key issues related to each type of transport measure:

Figure 18: Key issues relating to the transport measures

TYPE OF TRANSPORT MEASURE	KEY ISSUES
Traffic management	<ul style="list-style-type: none"> • How does the implementation of the measure(s) change access to the centre by car (including parking provision), public transport, walking, cycling? • If access becomes more difficult for some modes, is this compensated by adequate improvements for other modes? • Would those for whom access is made more difficult or impossible be able to benefit from improvements to other modes? • Are those for whom access will improve likely to make use of it to travel to the centre to shop? • How do measures affect access to the peripheral parts of the centre?
Improvements to access to the centre	<ul style="list-style-type: none"> • Are public transport services geared towards commuters or do they favour shoppers? • Do Park & Ride services serve local people as well as visitors? • Do public transport services serve the whole of the local population? • Do public transport services stop near to the shops within the city/town centre? • Can a balance be achieved between supplying transport services to the city/town centre and to competing developments? (i.e. is there scope for transport operators and retailers to work together on promotional activities?) • Are public transport prices competitive with parking charges?
Physical enhancement	<ul style="list-style-type: none"> • How pleasant is the stay in the centre? (aesthetics, pollution, etc) • How easy is it to move between different parts of the centre? • Are there seats and facilities for people with restricted mobility? • How safe is it to move within the centre? • Is the area maintained to a high standard? • Will improvements in one part of the centre mean a decline in another part?

In addition to these, there are also important key issues related to external factors, which may sometimes be outside the local authority’s direct influence, such as competing retail developments within the same or a neighbouring local authority and, with greatly varying relevance, tourism. These factors, however, have all had an effect on the performance of both the transport measures and retail performance in the case study areas. The key issues relating to external factors are therefore worth consideration. Generally, the four most important external factors are:

- Disruption¹⁸ caused by the implementation
- Competing developments
- Media support
- Tourism

Even though external factors such as competing developments and the tourism economy are usually not linked to transport measures, the case studies have shown that there can still be some interrelationship between them. For example, in Sheffield, disruption has been caused by implementation works of the transport measures, and competing development (i.e. Meadowhall) has benefited from the Supertram, at the expense of the City Centre. In Edinburgh, tourists have helped to fill the extended walkways to capacity in peak hours, therefore making the city centre feel too crowded for shoppers.

Figure 19 below sets out the key factors with regard to the external factors:

Figure 19: Key issues relating to External Factors

EXTERNAL FACTORS	KEY ISSUES
Disruption	<ul style="list-style-type: none"> • What is the extent of the disruption caused by any works related to the measure? • Which areas will be affected? • For how long will they be affected? • How can it be made least damaging? • Will some retail outlets suffer more excessively than other?
Competing developments	<ul style="list-style-type: none"> • How does the competing shopping offer compare to the city/town centre • What is the quality of public transport services to the competing development? • How do parking charges compare?
Media	<ul style="list-style-type: none"> • Are the media fully informed of the changes to transport measures? • Has the support of the media been sought? • Is there a delegated person in charge of releasing information to the media? • Has the support of the media been obtained?
Tourism	<ul style="list-style-type: none"> • Is there enough bus service capacity to accommodate tourists? • Are there enough parking spaces for tourists as well as shoppers? • Are tourists shoppers? Are policies in place to attract tourists into the shops? Does this distort the shopping offer?

¹⁸It is acknowledged that whilst disruption is not entirely external to transport measures, it is not usually associated with the long-term transport system

5.4 Important considerations in implementing transport measures

Based on the findings of this study, it can be stated with relative certainty that measures that reduce car access to a shopping centre are more likely to benefit a centre than to harm it. The only city proving to be a clear exception to this and showing a clear disbenefit was Sheffield. In the Sheffield example, however, there were major external factors at play; these were the excessive disruption caused by the Supertram works and the continuing strength of Meadowhall. There are, however, important lessons to be learnt to improve the likelihood that measures prove economically successful. These are described separately for larger and smaller centres:

Large centres

In larger centres, it would normally already be impossible for people to park outside shops in the main shopping street, so that pedestrianisation has a much reduced immediate effect on how they would access high street shops. Therefore such pedestrianisation schemes are likely to receive a positive response, if they make people's stay more pleasant and safe. This usually means that buses must also be banned from the street and that comprehensive environmental enhancements need to be put in place.

Whilst environmental enhancements have a great potential to win people over, they unfortunately come at the price of often considerable disruption during the period in which they are put in place. As access restrictions in themselves already cause some disruption as people have to adapt to them, it seems advisable to complete any related building work as quickly as possible to minimise the disruption period and show the benefits as soon as possible.

Acceptance is a lot more difficult to achieve if measures go beyond a simple pedestrianisation scheme and aim at discouraging car use for shopping trips into the centre in favour of other modes. Examples of this are restrictive parking policies and large scale access restrictions. As these measures actually tend to reduce the accessibility of the centre, there is a need to offset this by increasing accessibility by other modes. This has to be done in a way that benefits those people for whom access was made more difficult.

Park & Ride systems are often cited, rightly as important public transport improvements, but due to their peripheral location, they benefit almost exclusively outside visitors and longer distance commuters. Therefore they need to be complemented by improvements for people travelling shorter distances. These need to be highly visible and of a very high standard, so that people feel they get something in return for giving up the right to drive into the centre. Even with these important supplementary measures in place, it has to be accepted that some customers, who cannot be persuaded not to use a car, will shop elsewhere if they find accessing the centre by car too difficult or too expensive.

Particular consideration needs to be given to the treatment of the edges of a pedestrianised area. The example of Ipswich has shown that more peripheral areas can suffer following pedestrianisation schemes. This can be the case even if the access situation for the peripheral area itself remains unchanged. Due to the greater ease with which shoppers can move within

pedestrianised areas, it is comparatively harder to access areas outside it and a perceptual boundary is created. A lot of attention should therefore be given to creating very obvious and convenient links between treated areas and other parts of a centre.

Another area that needs to be considered carefully is the impact a scheme may have on smaller independent retailers and bulky goods retailers. Whereas multiple retailers can usually cope with a limited period of reduced turnover due to disruptions; such disruptions can be very harmful for independent retailers who rely on the income from only one or a few stores. Prior to a scheme's implementation it would therefore be advisable to assess the vulnerability of independent retailers and discuss possible mitigating measures with them. Bulky goods retailers are often regarded as relying on car access, as customers would want to take bought items home with them by car. Where such retailers are affected by access restrictions, assistance in setting up a delivery service, possibly covering many retailers, could be helpful.

Smaller centres

Even for smaller centres people generally seem to accept that not being able to drive straight to the shop they wish to visit is a price worth paying for the increased attractiveness and safety a pedestrianised centre, or one with reduced car traffic, can offer.

Due to the fact that the shopping offer in smaller, and in particular in district centres, is often relatively exchangeable, these areas are more vulnerable to losing customers to competing centres. Also, because of the limited size of the centre, customers will be less willing to accept inconvenience in accessing the centre. Whilst the use of more sustainable modes of transport should be encouraged and made easy, the scope for discouraging car travel is more limited as these areas are likely to have less extensive public transport services. Policies that provide disincentives to travel to the centre by car need to be introduced carefully and take account of the local situation.

Where councils have decriminalised parking, parking policies offer a range of opportunities. Pricing strategies for parking usually favour short stays in order to discourage use by commuters, often set up as a pay-and-display system. This is however often criticised as discouraging customers from spending more time and money in the centre, as they risk being fined if they spend longer than they intended to. A solution to this is the introduction of more pay-on-exit systems, with prices that still favour shorter stays, but where people cannot incur fines. These are however only suitable for confined car parks and can obviously not apply to on-street parking.

As in larger centres, there is a need to assess in advance the disruption caused by the measures and how it can be minimised. Again, there is a need to identify businesses that are likely to be particularly vulnerable and discuss mitigation measures.

6 RECOMMENDATIONS

The final section presents the recommendations of the study based on the finding of this report, Deliverable 3 'Survey Report' and also the discussions held at a final Workshop on 24th January 2002, which was attended by government policy makers, researchers, transport officers, a city centre manager and a representative of the retail sector. The recommendations focus on two areas: the implementation of transport schemes and monitoring of their wider impact on the retail centre.

6.1 Transport schemes that support town centres' health

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. In 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 a number of major external factors. The following recommendations for transport schemes are therefore put forward:

- Traffic management measures (such as car restriction policies and parking polices) 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 ease of movement within the centre as well as the general quality of the stay in the centre.

6.2 Scheme monitoring that works

Monitoring the impact of transport policies that goes beyond the immediate transport effects and includes the economic impact 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. 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. At the same time retailers may have formed a different verdict based on the results of sales figures.

Both the case studies and the discussion at the workshop pointed to the fact that indicators expressed through quantitative data are by no means easy to interpret and that many indicators have to be seen in context with others. There have been cases for example, where P&R usage decreased, which would be interpreted as a negative trend, but it turned out that bus ridership went up for the same period, because people chose to travel by bus for the whole journey, which indicates a positive development.

As could be seen from the case studies, it is very useful to complement the 'hard' data gathered through the indicators by qualitative data, as this can shed light on the underlying motivations and attitudes. We acknowledge that undertaking regular focus group discussions may stretch local resources, but it is possible to think of less expensive ways to set up a mechanism to obtain qualitative information, for example discussing these issues with local community groups.

The following recommendations are put forward for the monitoring of the wider impact of transport measures:

1. 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

Suggested indicators include:

- Turnover: an important indicator as it directly reflects retailer interest. It also complements vitality indicators such as pedestrian flows. A panel survey including a sufficiently large number of retailers located in different parts of the centre was found to be the most useful approach. Multiple retailers were considered more suitable for inclusion in the panel than small independent retailers as their methods in measuring turnover are perceived as more reliable and consistent. It is likely to be sufficient to collect indexed data in order to ensure that no commercially sensitive data is required. The turnover data could usefully be complemented with an additional indicator: average transaction value. The main drawback with this approach would be that as the range of stores in the centre changes, the panel composition may change, often with the loss of the worst performers.

- Shopping rents: the rental level for shops is a useful indicator that is easy to collect. It reflects the demand for floorspace in the retail centre, but needs to be seen in the context of the overall amount of floorspace available.
- Pedestrian flows: these are an important vitality indicator, but are easily influenced by external factors such as weather and special events. A year on year change may therefore be less meaningful than looking at the development over several years. To obtain a clearer picture, pedestrian flows should be analysed street by street
- Vacancy rates: in order to be able to identify whether some areas within a centre may be in decline whilst others are doing well, vacancy rates should be collected separately for different parts/streets of the retail centre.

Data for the following indicators is less readily available, they are therefore considered as optional:

- Modal split to the city centre for shopping trips: this indicator is not listed in PPG6 and is rarely collected, but would be able to provide very useful information on how transport measures affect the specific travel behaviour of shoppers. It should cover all main modes.
 - Shopper views surveys: although this is an indicator which requires resource intensive data collection, it would provide data well suited to complement the indicators listed above, even if this data could only be collected bi-annually. It would also allow to identify important characteristics, for example how important tourism is as an influence on shopper numbers.
2. There appears to be a case for establishing a framework for the collection of all or some of these indicators at the regional level, for example through the Regional Development Agencies, as these are likely to be seen as more objective by local stakeholders and some retailers may be more willing to supply commercial data to such an agency. As the actual collection of the data may be easier at the local level, a compromise could be that the Regional Development Agencies compile and hold the data for all centres in their region. This approach would have the additional benefit of enabling a comparison between the retail performance of different centres within the region, within the context of regional changes.
 3. The indicators should be published and be made readily accessible to all professionals (for example transport officers, planning officers as well as the retail sector).
 4. The co-operation with the retail sector should be sought in establishing a consistent approach to the collection of retail data to ensure support among retailers in providing the necessary data.