

## APPENDIX 4

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### ANALYSIS OF VISITOR SURVEY RESULTS



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### Methodology

1. A market research firm (NEMS) was instructed to conduct face-to-face surveys with a random sample of visitors to the six study centres (Epping, Loughton High Road, Waltham Abbey, Loughton Broadway, Chipping Ongar and Buckhurst Hill), in June 2009. The full tabulated data are presented **Volume 3**.
2. In each centre, the surveys were undertaken on different days of the week and at different times of the day to ensure a representative sample of pedestrians. Where there are markets (i.e. Epping, Road, Waltham Abbey and Loughton Broadway) it was ensured that half of the survey samples were undertaken on a market day, and the other half – on a non-market day. In addition, interviewers were not asked to interview at any specific locations in each of the centres; instead they were asked to use a variety of different sampling points.

**Table 1 Visitor Survey Locations**

Town	Survey days
Epping	Wednesday 10 June (50 interviews) Monday 15 June (45 interviews) Tuesday 16 June (5 interviews)
Loughton High Road	Tuesday 9 June (50 interviews) Saturday 30 June (50 interviews)
Waltham Abbey	Tuesday 9 June (50 interviews) Friday 12 June (49 interviews) Wednesday 17 June (1 interview)
Loughton Broadway	Thursday 11 June (48 interviews) Monday 15 June (52 interviews)
Chipping Ongar	Tuesday 16 June (50 interviews)
Buckhurst Hill	Tuesday 16 June (50 interviews)

3. Visitors were questioned by NEMS surveyors using a standard visitor survey questionnaire. This questionnaire covers the following general issues:
  - the trip characteristics: mode of transport to the centre; the intended length of stay to the centre; the frequency of visits to the centre;
  - the purpose for visiting the centre;
  - the likes and dislikes about the centre;
4. Specific questions cover shopping and leisure facilities:
  - the ways in which the centre could be improved for shopping and leisure activities;

- the types of leisure facilities which are lacking or overprovided for in the centre, and where additional leisure facilities could be located;
5. In total, NEMS completed 500 successful interviews, which can be broken-down as follows:
    - Epping - 100;
    - Loughton High Road - 100;
    - Waltham Abbey - 100;
    - Loughton Broadway -100;
    - Chipping Ongar - 50; and
    - Buckhurst Hill – 50.
  6. In this Appendix, the key results from these visitor surveys are explained for each town centre.
  7. The results of the street survey are weighted in two ways: by pedestrian count only, and by pedestrian count and frequency of visit. The weighting by pedestrian count only is referred to in our analysis as ‘trips’ – the survey results having been weighted by pedestrian count per survey location, in order to achieve a fair share of responses for each survey location (that is, a survey of ‘trips’). The second weighting is referred to as ‘people’ – that is, no account is taken in this weighting of the number of interviews achieved at each survey location. The ‘people’ weighting is instead weighted by the inverse of the frequency of the visit, in order to down-weight the potential for over-representation in the survey from more frequent visitors. This approach to weighting follows the advice in URPI’s (Unit for Retail Planning Information Limited) Information Brief 91/2, which states:

*‘Since people who shop more frequently are more likely to be interviewed than those who shop less frequently, they will be over-represented in a sample of shopping trips. To correct this over-representation, each respondent’s data should be weighted, using a weight less than one for frequent shoppers, and a weight greater than one for infrequent shoppers.’*
  8. The headline findings from the results are presented in Sections 2 and 3 below. For Question 1 (mode of travel to centre) we provide commentary in relation to both the ‘trips’ and the ‘people’ weightings. For the remaining questions, we confine our commentary to the ‘people’ weighting, since these questions generally relate to more qualitative issues for which the precise survey location of respondents does not skew the results.
  9. NEMS successfully completed 500 interviews with visitors to the six study centres. Of the 500 interviewees, 99% complied with a request to specify their home postcode.

## **Epping**

### ***Trip Characteristics***

10. The majority of visitors questioned travelled to Epping by car as the driver (54%), with a very small proportion of visitors (2%) who arrive at the centre as car passengers. A high proportion of visitors questioned visit the centre on foot (30%). The majority of those questioned visit Epping once a week (34%) or two-three days a week (31%). 17% visit the centre 4 to 6 days a week.

### ***Purpose of visiting the centre***

11. The main purpose for visits to the centre is food and grocery shopping. Those buying food items account for 42% of respondents, whilst those buying non-food items account for only 14% of respondents. 17% of visitors go to Epping for personal services – banks, hairdressers, etc.

### ***Likes and Dislikes***

12. The convenient location of the centre is the main thing that respondents (22%) like about Epping town centre. Its character and atmosphere are also reasons that respondents like the centre (19%). 19% of visitors also liked the centre because of its friendly and polite people.
13. In terms of aspects of the centre that are disliked by respondents, the majority of those surveyed state there is nothing in particular (31%), or have no opinion (26%). Traffic and road congestion was another aspect of the town centre which was disliked by 9% of visitors.

### ***Shopping***

14. The majority of visitors (75%) are either very satisfied or satisfied with the overall range and quality of shops in Epping Town Centre. 44% of respondents could not think of a way to improve the centre. 10% thought it could be improved by more parking, 6% by cheaper parking and more shelter from rain/wind. 5% of visitors would like to see a better offer of shops in general.

### ***Leisure and Environmental Quality***

15. The majority of respondents (29%) never visit Epping town centre in the evenings, whereas 19% visit it once a week. The majority of those who do visit eat out (52.8%) or go to bars and pubs (45.3%). Over 75% of respondents were either very satisfied, or satisfied with the centre's performance as a location for dining, and 48% were very satisfied, or satisfied with the centre's pubs and bars offer.
16. The environmental quality categories comprise cleanliness, personal safety, quality of buildings, shelter from weather and pedestrian/vehicular safety. Most respondents found Epping to be 'good' under a number of categories suggesting that most find Epping to have a pleasant environment. Some categories which were found to be 'satisfactory' by

the majority of respondents include ease of cycling access; access for people with disabilities; and shelter from the weather.

17. The majority (over 70%) found the ease of movement around the centre on foot to be good. The location of car parks was good or very good for 55% of respondents. More than 70% of visitors found that the quality of buildings and the townscape is good or very good.

## **Loughton High Road**

### ***Trip Characteristics***

18. The majority of people (38%) travelled to Loughton High Road by car as the driver, 16% travelled on foot to the centre.
19. 42% of the respondents visit the centre two to three days a week, 23% visit one day a week and 1% once every two weeks.

### ***Purpose for visiting the centre***

20. The main reason for people visiting Loughton High Road was to buy food items (20%), whereas only 8% of respondents were there to buy non-food items. 19% of respondents were in Loughton High Road to work, and 14% - to meet someone.

### ***Likes and Dislikes***

21. The main reason for liking Loughton High Road is due to the convenient location (35%), and 14% appreciated its atmosphere and character. 20% responded that there was nothing in particular they liked about the centre.
22. Lack of choice of national multiples was one of the strongest dislikes of the centre – 21%. Other aspects disliked included traffic and road congestion, lack of choice of independent shops, inadequate range of leisure facilities and lack of clean/secure toilets.

### ***Shopping***

23. Overall 43% of respondents were satisfied with the overall range and quality of shops in Loughton High Road, 14% were neutral and 33% were dissatisfied with the shops the centre has to offer.
24. When asked how to improve the Loughton High Road town centre respondents felt that having more national multiple retailers (32%); more/better places to eat (19%); and more priority for pedestrians (15%) would help.

### ***Leisure and Environmental Quality***

25. 18% of respondents visit Loughton High Road in the evening two to three days a week, and 14% visit it one day a week. The main purpose for these evening visits are for visiting bars and pubs (57%) and for eating out in the centre (35.7%). 47% of visitors were satisfied with the centre as a location for dining.

26. In terms of environmental quality cleanliness of streets was considered good by 50% of respondents and satisfactory by 40%. Personal safety/ lighting/ policing issues had a majority thinking it was good (46%), 37% felt this was satisfactory.
27. Quality of buildings was thought to be satisfactory by 50% of respondents, good by 31% and poor by 9%. 14% of visitors thought that shelter from weather was good in Loughton High Road; 32% thought it was satisfactory, 33% thought it was very poor and 14% found it was very poor.
28. In terms of pedestrian/ vehicular safety issues, 39% found that the centre is satisfactory, 30% responded that it was poor, and 14% considered it good.
29. The location of the underground station was considered to be good by 45% of visitors, very good by 18%, and satisfactory by 24%. 41% of the respondents thought the security of rail/ bus station was good and 32% felt it was satisfactory. 15% of people didn't know about the security of the rail/ bus station.
30. Ease of cycling was thought to be satisfactory by 14% and 70% of respondents did not know. The amount/ quality of pedestrianisation were considered good by 28% and satisfactory by 27% of respondents. Ease of movement around the centre on foot was considered good by 34% respondents and 25% thought it was satisfactory. Access for people with mobility, hearing or sight disability was considered poor by 31% of respondents, 36% of respondents answered don't know to this question.

## **Waltham Abbey**

### ***Trip Characteristics***

31. The majority of visitors questioned travelled to Waltham Abbey by car as the driver (42%), only a small proportion travelled as a passenger by car (5%). The number of visitors travelling by foot was a high proportion in Waltham Abbey (45%).
32. Many respondents visit Waltham Abbey (31%) one a day a week, and two to three days a week (31%). 11% of the interviewees visit the centre every day.

### ***Purpose for visiting the centre***

33. The main reason for people visiting the centre is to use services within Waltham Abbey. Services (e.g. bank, building society, hairdressers) account for 32% of visits, to buy food and grocery items accounts for 12%, and to visit the market accounts for 9%. 7% of respondents visited the centre to buy non-food items.

### ***Likes and Dislikes***

34. Many respondents liked the character and atmosphere of Waltham Abbey (35%). 25% enjoyed its convenient location, and 20% rated its friendly and polite people as an important factor. 20% of respondents felt that there was nothing in particular that they liked about the centre.

35. In terms of dislikes within Waltham Abbey, 33% of respondents felt that there is nothing in particular that they don't like. 26.6% of respondents did not like the lack of independent shops in the centre. Lack of choice of national multiple retailers, as well as the quality of shops in general also appear to be an issue for 17% of respondents.

### *Shopping*

36. The majority of shoppers were satisfied with the range and quality of shops within Waltham Abbey (37%). 16% of respondents were neutral to the shopping offer and 31% of people were dissatisfied with the range and quality of shops the centre has to offer.

### *Leisure and Environmental Quality*

37. A very high proportion of respondents never visit Waltham Abbey centre in the evening (62%). 1% visit four to six evenings a week and 10% once a month. The main purposes for people visiting Waltham Abbey in the evenings were to use the pubs/bars (48%) and eating out (40%).
38. As a location for dining, 16% of visitors were very satisfied, and 64% were satisfied with Waltham Abbey. 20% had no opinion on this matter.
39. In terms of environmental quality, the majority of respondents surveyed in Waltham Abbey felt the cleanliness of shopping streets was good (53%), 27% of respondents found it to be satisfactory and 10% saw it as poor. Personal safety/ lighting/ policing issues had a slightly lower rating. 45% of respondents felt it was good and 16% of respondents felt it to be poor.
40. Quality of buildings/ townscape had a majority of respondents feeling it was good (45%), only 16% of people replied that it was poor. Shelter from the weather had a majority of respondents selecting poor (42%). 26% of respondents feel Waltham Abbey has satisfactory shelter from the weather.
41. The majority (58%) of respondents found the location of car parks in Waltham Abbey good. 33% responded that security of car parks is good. The majority of people (69%) responded that they didn't know about the location of rail/ bus station and 19% of people thought they were in a poor location. There was a similar response for security of rail/ bus station, 74% didn't know and 11% thought it was poor. When considering ease of cycling access the majority of respondents (41%) didn't know and 28% felt ease of cycling access was good.
42. When asked about the quality/amount of pedestrianisation 67% of respondents said it was satisfactory in Waltham Abbey. Ease of movement by foot around the centre was mostly considered good (80%). The majority of people (40%) thought that access for people with mobility/ hearing/ sighting disability was good, 24% were unsure.



## Loughton Broadway

### *Trip Characteristics*

43. The majority of visitors questioned travelled to Loughton Broadway on foot (38%). This is closely followed by people who arrive in the centre as drivers of private vehicles (36%). 12% of visitors arrive in Loughton Broadway by bus.
44. Many respondents visit Loughton Broadway two to three days a week (28%). 8% visit it every day, 15% - four to six days a week, and 3% - never.
45. The main reason for people visiting the centre is to buy food and grocery items (33%). Services (e.g. bank, building society, hairdressers) account for 16%, and going to Loughton Broadway for work accounts for 12% of visitors.

### *Likes and Dislikes*

46. Many respondents liked the convenient location and nearness of Loughton Broadway (42%). 'Nothing in particular' (30%) and 'don't know' were the other two most popular responses.
47. In terms of dislikes within Loughton Broadway, the response with the highest percentage is the lack of choice of national multiple retailers (28%); and 18% of respondents feel that there is nothing in particular that they do not like.

### *Shopping*

48. The majority of shoppers were satisfied with the range and quality of shops within Loughton Broadway (34%). 16% of respondents were neutral to the shopping offer and 32% of people were dissatisfied with the range and quality of shops Loughton Broadway has to offer.

### *Leisure*

49. A very high proportion of respondents never visit Loughton Broadway in the evening (66%). Very few respondents visit Loughton Broadway in the evening, 12% visit 1 evening a week and 5.0% once every 2 weeks. The main purposes for people visiting Loughton Broadway in the evenings were to use the pubs/bars (48%), eating out (40%) and shopping (16.7%).
50. 23.1% of respondents were neutral about being satisfied with the dining in Loughton Broadway, 34.6% of respondents were satisfied and 19.2% were dissatisfied. 11.5% of respondents had no opinion about evening entertainment in Loughton Broadway.
51. In terms of environmental quality, the majority of respondents surveyed in Loughton Broadway felt the cleanliness of shopping streets was satisfactory (57%), 23% of respondents found it to be good and 15% saw it as poor. In terms of personal safety/ lighting/ policing issues 60% of respondents felt it was satisfactory, 19% of respondents found it to be good and 14% felt it to be poor.

52. Quality of buildings/ townscape had a majority of respondents feeling it was satisfactory (60%), only 14% of people replied that it was good and 19% thought it was poor. Shelter from the weather had a majority of respondents selecting poor (46%). 22% of respondents feel Loughton Broadway has satisfactory shelter from the weather.
53. The majority (42%) of respondents found the location of car parks in Loughton Broadway satisfactory. 45% responded that security of car parks is satisfactory. The majority of people responded that the location of underground/rail station was good (53%) and 26% of people thought they were satisfactory. For security of underground/rail station, 40% of respondents thought it was good and 18% did not know. When considering ease of cycling access the majority of respondents (64%) didn't know and only 6% felt ease of cycling access was good.
54. When asked about the quality/amount of pedestrianisation 48% of respondents said it was satisfactory in Loughton Broadway. Ease of movement by foot around the centre was mostly satisfactory (50%). The majority of people (30%) were unsure of access for people with mobility/ hearing/ sighting disability, 28% of respondents felt it was satisfactory.
55. When asked about how Loughton Broadway could best be improved, 28% of respondents stated that it needed more national multiple retailers. 14% felt more shelter from the wind and 11% felt more independent shops would improve the centre.

## Chipping Ongar

### *Trip Characteristics*

56. The majority of visitors questioned travelled to Chipping Ongar by car as the driver (50%), only a small proportion travelled as a passenger by car (2%). The number of visitors travelling by foot was a high proportion in Chipping Ongar (46%).
57. Many visitors visit Chipping Ongar (28%) 1 day a week. 28% of respondents visit 2 to 3 days a week and 26% visit 4 to 6 days a week.

### *Purpose for visiting the centre*

58. The main reason for people visiting the centre is for work (32%).
59. Reason for visiting to buy food and grocery items had a figure of 24% and non-food items 6%. A reasonably high number of people visited Chipping Ongar for personal services (e.g. bank, hairdresser, solicitor) (14%).

### *Likes and Dislikes*

60. Many respondents liked the character/atmosphere of Chipping Ongar (54%). Both friendly/polite people (26%) and green space/area (22%) had a high response. 20% of respondents said they liked everything about the centre and 16% of respondents liked the historic buildings. Only 8% said there was nothing in particular that they liked about Chipping Ongar.

61. In terms of dislikes within Chipping Ongar, 34% of respondents feel that there is nothing in particular that they don't like. 12% of respondents said that it was too noisy and 10% disliked the expensive parking. 10% of respondents also didn't like the road congestion in the centre.

### *Shopping*

62. The majority of shoppers were satisfied with the range and quality of shops within Chipping Ongar (58%). 22% of respondents were dissatisfied with the shopping offer and 18% of people were neutral to the range and quality of shops Chipping Ongar has to offer.

### *Leisure*

63. A very high proportion of respondents never visit Chipping Ongar centre in the evening (54%). Very few respondents visit Chipping Ongar centre in the evening, 14% less often than once a quarter and 12% visit 1 day a week. The main purposes for people visiting Chipping Ongar in the evenings were to use the pubs/bars (37.5%), eating out (50%) and social clubs (12.5%).
64. 62.5% of respondents were satisfied with the centre's performance for a location for dining. 12.5% of respondents were neutral and 12.5% were dissatisfied. 12.5% of respondents also had no opinion about dining in Chipping Ongar. 26% of respondents were satisfied with the pubs/bars on offer in Chipping Ongar. Only 6% were dissatisfied and 48% of respondents have no opinion on the pubs/bars on offer.
65. In terms of environmental quality, the majority of respondents surveyed in Chipping Ongar felt the cleanliness of shopping streets was good (52%), 32% of respondents found it to be satisfactory and 8% saw it as poor. When asked about Personal Safety/ lighting/ policing issues, 58% of respondents felt it was good and 10% of respondents felt it to be poor.
66. Quality of buildings/ townscape had a majority of respondents feeling it was good (50%), only 4% of people replied that it was poor. Shelter from the weather had a majority of respondents selecting satisfactory (36%). 32% of respondents feel Chipping Ongar has good shelter from the weather and only 10% think it has poor shelter. When asked about Pedestrian/Vehicular safety issues, 54% of respondents said it was good and 16% thought it was poor.
67. The majority (68%) of respondents found the location of car parks in Chipping Ongar good. 64% responded that security of car parks is good.
68. When asked about the quality/amount of pedestrianisation 36% of respondents said it was good in Chipping Ongar. Ease of movement by foot around the centre was mostly considered good (66%). The majority of people (42%) were unsure of access for people with mobility/ hearing/ sighting disability, 36% of respondents felt it was good.
69. When asked how Chipping Ongar could best be improved, it was felt by 16% of respondents that the centre would benefit from cheaper parking, 12% felt more parking and 12% felt more/better eating places would improve the centre.

## **Buckhurst Hill**

### ***Trip Characteristics***

70. The majority of visitors questioned travelled to Buckhurst Hill by foot (46%). 34% travelled to the centre by car as the driver and only a small proportion travelled as a passenger by car (4%).
71. Many visitors visit Buckhurst Hill (40%) 2 to 3 days a week. 16% of respondents visit everyday and 16% visit 2 to 3 days a week.

### ***Purpose for visiting the centre***

72. The main reason (28%) for people visiting the centre is to buy non-food goods.
73. Reason for visiting to buy food items had a figure of 26%. A reasonably high number of people visited Buckhurst Hill to meet someone (14%) and for personal services (e.g. bank, hairdresser, solicitor) (14%)

### ***Likes and Dislikes***

74. Many respondents liked the convenient location of Buckhurst Hill (70%). 12% of respondents said they liked the character/atmosphere of the centre. 12% of respondents also felt that there was nothing in particular that they liked about the centre.
75. In terms of dislikes within Chipping Ongar, 26% of respondents feel that there is nothing in particular that they don't like. 12% of respondents said that the shops are too small.

### ***Shopping***

76. The majority of shoppers were neutral in terms of the range and quality of shops within Buckhurst Hill (42%). 24% of respondents were satisfied with the shopping offer and 16% of people were dissatisfied with the range and quality of shops Buckhurst Hill has to offer.

### ***Leisure***

77. The majority of respondents never visit Buckhurst Hill in the evening (30%). 28% of respondents visit Buckhurst Hill once every month and 20% one day a week. The main purposes for people visiting Buckhurst Hill in the evenings were to use the pubs/bars (25.8%) and eating out (51.6%).
78. 45.2% of respondents were satisfied with Buckhurst Hill as a location for dining. 41.9% were neutral and only 3.2% were dissatisfied. 26% of respondents were satisfied with the bars/pubs on offer in Buckhurst Hill. 16% were neutral and only 4% were dissatisfied. 38% of respondents had no opinion about the bars/pubs on offer in the centre.
79. In terms of environmental quality, the majority of respondents surveyed in Buckhurst Hill felt the cleanliness of shopping streets was satisfactory (58%), 26% of respondents found it to be good and 12% saw it as poor. When asked about Personal safety/ lighting/ policing issues 62% of respondents felt it was satisfactory and 16% of respondents felt it to be poor.

80. Quality of buildings/ townscape had a majority of respondents feeling it was satisfactory (72%), only 18% of people replied that it was good and 10% felt that it was poor. Shelter from the weather had a majority of respondents selecting satisfactory (48%). 42% of respondents feel Buckhurst Hill has poor shelter from the weather.
81. 90% of respondents thought that pedestrian/vehicular safety issues in Buckhurst Hill were satisfactory and only 4% saw them as poor.
82. The majority (52%) of respondents found the location of car parks in Buckhurst Hill satisfactory. 52% responded that security of car parks is satisfactory. The majority of people (70%) responded that they thought the location of underground/ rail station was satisfactory and 26% of people thought it was in a good location. When asked about the security of the underground/ rail station, 62% thought it was satisfactory and only 10% thought it was poor. When considering ease of cycling access the majority of respondents (48%) didn't know and 44% felt ease of cycling access was satisfactory.
83. When asked about the quality/amount of pedestrianisation 78% of respondents said it was satisfactory in Buckhurst Hill. Ease of movement by foot around the centre was mostly considered satisfactory (80%). The majority of people (58%) thought that access for people with mobility/ hearing/ sighting disability was satisfactory and 22% of respondents felt it was poor.
84. When asked how Buckhurst Hill could best be improved, it was felt by 20% of respondents that the centre would benefit from more parking. 18% also felt a better choice of shops in general would improve the centre.

