

4 KEY FINDINGS FROM VISITOR SURVEYS

Visitor Survey Methodology

- 4.1 One of the key indicators of vitality and viability identified in Annex D (A11) of PPS4 is customers' and residents' views and behaviour. To contribute to this research, an on-street survey of 100 visitors was undertaken in Epping, Loughton High Road, Waltham Abbey and Loughton Broadway, and 50 visitors each in Chipping Ongar and Buckhurst Hill.
- 4.2 The full visitor survey results are presented at **Volume 3**. Both weighted and un-weighted are presented for mode of travel to the centre to make the results more representative. For the rest of the indicators we have only used un-weighted data. (URPI, Information Brief 91/2, April 1991):
- 'Since people who shop 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. The simplest weight to use is the reciprocal of the trip frequency. That is, each respondent's data should be divided by the frequency with which that person visits the shopping centre. This is similar to the Politz-Simmons weighting method sometimes used to adjust for not-at-home bias in household interviews. Data from a person who shops three times a week should be weighted by a half, data from a person who shops once a fortnight should be weighted by two.'*
- 4.3 The detailed reporting of the visitor surveys can be found at **Appendix 4**. In this section the key findings from the visitor survey are presented focusing on customer satisfaction ratings, customer behaviour, suggestions for improvements and cultural offer.

Mode of Travel

- 4.4 The most popular mode of travel to all of the centres was by car, with the exception of Buckhurst Hill, where most people arrived on foot (46%). The second most popular mode of travel for Epping, Waltham Abbey, Loughton Broadway and Chipping Ongar was by foot. But for Loughton High Road the second most common mode of travel is public transport. On the other hand, Chipping Ongar and Buckhurst Hill have the lowest usage of public transport - 0% for Buckhurst Hill and 2% for Chipping Ongar.
- 4.5 A summary of the most common modes of transport for the six centres is summarised below (using the un-weighted survey results):
- **Epping:** 56% arrived by car/van/taxi; 30% walked; and 8% used public transport.
 - **Loughton High Road:** 49% arrived by car/van/taxi; 25% used public transport (bus and train); and 16% walked.
 - **Waltham Abbey:** 47% arrived by car/van/taxi; 45% walked; 5% used public transport, and 2% arrived on a bicycle.
 - **Loughton Broadway:** 40% arrived by car/van/taxi; 38% walked; and 14% used public transport;

- **Chipping Ongar:** 52% arrived by car/van/taxi; 46% walked; and 2% arrived by bus.
- **Buckhurst Hill:** 46% arrived on foot; 36% arrived by car/van/taxi; and 14% used a bicycle.

Frequency of Visits

4.6 **Table 4.1** presents the frequency of visits for food and grocery shopping and **Table 4.2** presents the frequency of visits for non-food shopping. These data use the un-weighted results.

Table 4.1 Frequency of Visits for Food and Grocery Shopping (un-weighted)

Centre	Between 4 and 7 days a week	Between 1 and 3 days a week	Once or twice each month	Less often than once a month	Never
Epping	15%	60%	10%	8%	6%
Loughton High Road	5%	70%	3%	4%	6%
Waltham Abbey	14%	57%	12%	4%	13%
Loughton Broadway	21%	44%	12%	5%	17%
Chipping Ongar	26%	38%	18%	4%	12%
Buckhurst Hill	20%	64%	10%	0%	6%

Source: Volume 3 and Appendix 4.

Table 4.2 Frequency of Visits for Non Food Shopping (un-weighted)

Centre	Between 4 and 7 days a week	Between 1 and 3 days a week	Once or twice each month	Less often than once a month	Never
Epping	4%	34%	40%	8%	13%
Loughton High Road	0%	14%	13%	60%	12%
Waltham Abbey	1%	11%	17%	22%	47%
Loughton Broadway	3%	19%	14%	41%	22%
Chipping Ongar	0%	12%	24%	36%	22%
Buckhurst Hill	12%	52%	10%	4%	22%

Source: Volume 3 and Appendix 4.

4.7 The survey results are a reflection of the accessibility of the centres as well as the retail offer. In general terms, it is noted that:

- **Food and grocery shopping:** the smaller centres (Loughton Broadway, Chipping Ongar and Buckhurst Hill) attract visitors more regularly (4-7 days a week) due to the localised function of these centres. The larger centres (Epping, Loughton High Road and Waltham Abbey) attract visitors less regularly (1-3 days a week) due to the trend

to visit larger centres for a weekly bulky food shop. The exception is Buckhurst Hill that benefits from a large Waitrose in the town centre. The Sainsbury's store in Chipping Ongar is small and therefore is more likely to serve regular top-up shopping (as well as some bulk food shops), whilst the Loughton Broadway Sainsbury's store is dated and positioned on the edge of the centre and thus less likely to attract shoppers to the centre itself.

- **For non-food shopping:** non-food shopping is a less regular activity and the results reflect this trend. Buckhurst Hill attracts the highest number of regular visits (1-3 days a week) due to its specialist fashion offer and the high density of the surrounding residential areas. Epping is the next most popular destination for regular non-food shopping, but the trend for Loughton High Road is for a less frequent visit (less than once a month).

4.8 This data provided an indication of the role and function of the centres. However the results should be treated with caution since they are not linked with spending patterns. The main trend evident is that smaller centres serve a regular everyday function with the larger centres accommodating the more irregular shopping trips. This is consistent with the role and function of large centres vis-à-vis smaller centres. One notable trend is the regular use of Buckhurst Hill. This is due to the combined benefits of specialist fashion offer and a large Waitrose store in the centre. Coupled with the relative affluence of the surrounding area and the high density of population, Buckhurst Hill is used regularly for both food and grocery shopping and non-food shopping.

Main Purpose of Visits

4.9 The visitor survey asked about the main purpose of visit on the day of survey and the top three responses for each centre are as set out in **Table 4.3** below. Most people go to Epping, Loughton High Road and Loughton Broadway to buy food and grocery items. On the other hand, most visitors to Chipping Ongar go there for work; in Waltham Abbey the main purpose of visits is for personal services; and to buy comparison items in Buckhurst Hill.

Table 4.3 Main Purpose of Visit to Centre (un-weighted)

Centre	Top 3 Responses - % of Total Responses in Each Centre		
	1	2	3
Epping	To buy food and grocery items (42%)	For personal services (17%)	To buy non-food goods (14%)
Loughton High Road	To buy food & grocery items (20%)	Work (19%)	To meet someone (14%)
Waltham Abbey	For personal services (32%)	To buy food and grocery items (12%)	To visit the market (9%)
Loughton Broadway	To buy food and grocery items (33%)	For personal services (16%)	Work (12%)

Chipping Ongar	Work (32%)	To buy food and grocery items (24%)	For personal services (14%)
Buckhurst Hill	To buy non-food goods (28%)	To buy food & grocery items (26%)	For personal services/to meet someone (14%)

Source: Volume 3 and Appendix 4

Environmental Satisfaction

4.10 The pedestrian survey also sought customer satisfaction ratings in relation to five environmental factors, as set out in **Table 4.4** below.

Table 4.4 Assessment of Environmental Quality (% of people)

Centre	Environmental Factor - Top Response (as a % of Total Responses in Each Centre)				
	Cleanliness of shopping streets	Personal safety / lighting / policing issues	Quality of buildings / townscape	Shelter from weather	Pedestrian / vehicular safety issues
Epping	Good or very good (63%)	Good or very good (64%)	Good or very good (58%)	Satisfactory (53%)	Good or very good (60%)
Loughton High Road	Good or very good (50%)	Good or very good (46%)	Satisfactory (50%)	Poor or very poor (33%)	Satisfactory (39%)
Waltham Abbey	Good or very good (53%)	Good or very good (45%)	Good or very good (45%)	Poor or very poor (42%)	Good or very good (71%)
Loughton Broadway	Satisfactory (57%)	Satisfactory (60%)	Satisfactory (60%)	Poor or very poor (46%)	Satisfactory (50%)
Chipping Ongar	Good or very good (52%)	Good or very good (58%)	Good or very good (50%)	Satisfactory (36%)	Good or very good (54%)
Buckhurst Hill	Satisfactory (58%)	Satisfactory (62%)	Satisfactory (72%)	Satisfactory (48%)	Satisfactory (90%)

Source: Volume 3 and Appendix 4

4.11 It is noteworthy that:

- Epping and Chipping Ongar were, overall, the highest performing centres, receiving high numbers of 'good or very good' responses for environmental factors within the centre;
- Waltham Abbey achieved the highest visitor satisfaction for pedestrian/vehicular safety issues (71%);
- The lowest performing centre was Loughton Broadway, with 'satisfactory' and 'poor or very poor' responses only. This is especially in relation to 'shelter from the weather'.

Likes and Dislikes

- 4.12 The pedestrian survey also canvassed customer likes and dislikes and satisfaction with respect to the range and quality of shops in the centre; the findings are set out in **Table 4.5** below.
- 4.13 The majority of centres were liked most of all because of their convenience - Epping, Loughton High Road, Loughton Broadway and Buckhurst Hill. Waltham Abbey and Chipping Ongar were most liked because of their character and atmosphere. Visitors to all centres, with the exception of Loughton Broadway, appear to be happy with the centres, with more than 25% of visitors stating that there is nothing they dislike about them. In Loughton Broadway, the lack of choice of national multiples was the main point of 'dislike' for 28% of visitors.

Accessibility Satisfaction

- 4.14 The pedestrian survey also sought customer satisfaction ratings in relation to eight accessibility factors, as set out in **Table 4.6** below. The findings reveal that:
- Most centres receive an average percentage of 'good or very good' and 'average' ratings for location and security of car parks (between 42% and 68%);
 - Location of rail/tube station - high percentages of 'don't know' responses for Waltham Abbey and Chipping Ongar, where there are no rail or tube stations. In terms of the security of stations, 'good or very good' and 'satisfactory' responses were received, within the range of 49% and 62%;
 - 70% of respondents in Loughton High Road do not know about cycling access to the centre
 - Waltham Abbey received 83% of 'good or very good' responses for the amount/quality of pedestrianisation; it is followed by a 78% score of 'satisfactory' responses for Buckhurst Hill;
 - Waltham Abbey again leads in terms of ease of movement around the centre on foot - it received 88% 'good or very good' responses. This is not surprising, given the pleasant and safe pedestrian core of the centre.
 - In terms of disability access, the majority of responses were 'don't know' for three of the centres. Exceptions are Epping and Buckhurst Hill, where 43% and 58%, respectively, responded that facilities are 'satisfactory'.

Table 4.5 Aspects Most Liked/Disliked about the Centres (unweighted)

	Top 3 Responses - % of Total Responses in Each Centre					
	Like Most			Dislike Most		
	1	2	3	1	2	3
Epping	Near/ convenient (2%)	Character/ Atmosphere (19%)	Friendly/polite people (19%)	Nothing in particular (31%)	No opinion (26%)	Road Congestion (9%)
Loughton High Road	Near/ convenient (35%)	Nothing in particular (20%)	Character/ atmosphere (14%)	Nothing in particular (47%)	Lack of choice of national multiples (21%)	Road congestion/lack of choice of independent shops / inadequate leisure facilities/lack of clean toilets (7%)
Waltham Abbey	Character/ Atmosphere (35%)	Near/ convenient (25%)	Friendly/ Polite people (20%)	Nothing in particular (33%)	Lack of choice of independent shops (26%)	Run down appearance of town centre (18%)
Loughton Broadway	Near/ convenient (42%)	Nothing in particular (30%)	No opinion (11%)	Lack of choice of national multiples (28%)	Nothing in particular (18%)	No opinion (11%)
Chipping Ongar	Character/ Atmosphere (54%)	Friendly/ Polite people (26%)	Green space (22%)	Nothing in particular (34%)	Too noisy (12%)	Expensive parking (10%)
Buckhurst Hill	Near/convenient (70%)	Character/ Atmosphere (12%)	Nothing in particular (12%)	Nothing in particular (26%)	Shops too small (12%)	No opinion (10%)

Source: Volume 3 and Appendix 4

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Table 4.6 Assessment of Accessibility (un-weighted)

Accessibility Factor - Top Response (as a % of Total Responses in Each Centre)								
Centre	Location of car parks	Security of car parks	Location of rail/tube station	Security of rail/bus station	Ease of cycling access	Amount/quality of pedestrianisation	Ease of movement around centre on foot	Access for people with mobility/hearing/sight disabilities
Epping	Good or very good (55%)	Good or very good (58%)	Good or very good (51%)	Good or very good (51%)	Satisfactory (47%)	Satisfactory (48%)	Good or very good (75%)	Satisfactory (43%)
Loughton High Road	Satisfactory (47%)	Satisfactory (37%)	Good or very good (63%)	Good or very good (49%)	Don't know (70%)	Good or very good (29%)	Good or very good (37%)	Don't know (36%)
Waltham Abbey	Good or very good (69%)	Good or very good (42%)	Don't know (69%)	Don't know (74%)	Don't know (41%)	Good or very good (83%)	Good or very good (88%)	Good or very good (45%)
Loughton Broadway	Satisfactory (42%)	Good or very good (45%)	Good or very good (62%)	Good or very good (44%)	Don't know (64%)	Satisfactory (48%)	Satisfactory (50%)	Don't know (30%)
Chipping Ongar	Good or very good (68%)	Good or very good (66%)	Don't know (72%)	Don't know (74%)	Satisfactory (40%)	Good/very good/satisfactory (36%)	Good or very good (68%)	Don't know (42%)
Buckhurst Hill	Satisfactory (52%)	Satisfactory (52%)	Satisfactory (70%)	Satisfactory (62%)	Don't know (48%)	Satisfactory (78%)	Satisfactory (80%)	Satisfactory (58%)

Source: Volume 3 and Appendix 4

Suggestions for Improvements

4.15 **Table 4.7** below sets out the most frequent responses relating to suggested improvements in each of the centres. Better choice of shops and more national multiples were the top ways to improve three of the town centres. Epping and Chipping Ongar had no specific suggestions for improvement. For Buckhurst Hill, more parking was a key possible improvement.

Table 4.7 Most Frequent Suggestions for Improvement in Each Centre

Centre	Top 3 Responses - % of Total Responses in Each Centre		
	1	2	3
Epping	None (44%)	More Parking (10%)	Cheaper Parking/ More shelter from wind (6%)
Loughton High Road	More national multiple retailers (32%)	Don't Know/ More/better eating places (19%)	More priority for pedestrians (15%)
Waltham Abbey	Better choice of shops in general (45%)	More independent shops (28%)	Better quality of shops (18%)
Loughton Broadway	More national multiple retailers (28%)	None Mentioned (15%)	More shelter from wind (14%)
Chipping Ongar	None Mentioned (28%)	Cheaper Parking (16%)	More Parking/More, better eating places/improve pedestrian/vehicular safety issues (12%)
Buckhurst Hill	More parking (20%)	More independent shops/better choice of shops in general (18%)	Don't know (16%)

Source: Volume 3 and Appendix 4