Shoppers and how they travel

liveable neighbourhoods

INFORMATION SHEET LN02

Over ten years ago, retailers in the Austrian city of Graz were asked how they thought their customers travelled to the shop, and shoppers were then interviewed to determine the reality. The results were fascinating: retailers hugely overestimated the importance of the car, and underestimated how many of their customers walked, cycled and used public transport [1].

Sustrans' researchers have now replicated the Graz study on two neighbourhood shopping streets in Bristol. Once again, we found that retailers overestimate the importance of the car. We also found that they overestimate how far their customers travel and underestimate how many shops each customer visits.

These findings have real significance for business planning – as well as land use and transport. It is traditional for retailers to pursue more car access and parking, and to resist measures to promote walking, cycling and public transport use – although pedestrian shopping areas tend to be commercially most successful. Our findings suggest that retail vitality would be best served by traffic restraint, public transport improvements, and a range of measures to improve the walking environment.

Know your customer

As part of the VIVALDI project, Bristol City Council is working to improve a number of arterial bus routes into the city. The routes concerned run through important local shopping areas, and traders in these areas have expressed concern that the works might have negative impacts on their businesses.

To help traders understand the behaviour of their customers, and to ensure that future transport planning is based on real data rather than supposition, Bristol and Sustrans investigated how customers travel to two important shopping zones on the VIVALDI bus routes. One of these has already seen the implementation of a Showcase bus route; the other is due for treatment in the future.

The Gloucester Road survey site: a sociable shopping experience

Retailers in Graz overestimated the importance of the car for customer travel
(from Traffic Restraint and Retail Vitality, Sustrans 2003)

CIVITAS Cleaner and better transport in cities

Sustrans' Liveable Neighbourhoods programme works with local residents and other partners to create high quality urban environments which promote sustainable travel behaviour and are safe, pleasant places to live in and visit. Sustrans is the UK's leading sustainable transport charity and works on practical projects to encourage people to walk, cycle and use public transport to benefit health and the environment.

National Cycle Network Centre, 2 Cathedral Square, College Green, Bristol, BS1 5DD

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Shoppers and how they travel

The researchers interviewed 126 retailers and 840 customers, using a standard questionnaire. Customers were asked:

- how far they travel to these shopping streets (ie, how far away they live)
- what mode of transport they use (walk, cycle, bus or car)
- how many shops they visit at one time (as a measure of how committed they are as a customer to the whole street)

Traders were asked to estimate their customers' behaviour according to these same measures, so giving a valuable insight into how customer behaviour compares with the traders' perception.

Shoppers live locally

Although both of these streets are urban arterial roads, with relatively limited parking, traders assumed that most of their customers were visitors to the area. They estimated that just 12% of customers lived within half a mile, and 40% more than two miles away. In reality, 42% had travelled less than half a mile and 86% had travelled less than two miles. Most customers are local.

Most shoppers walk

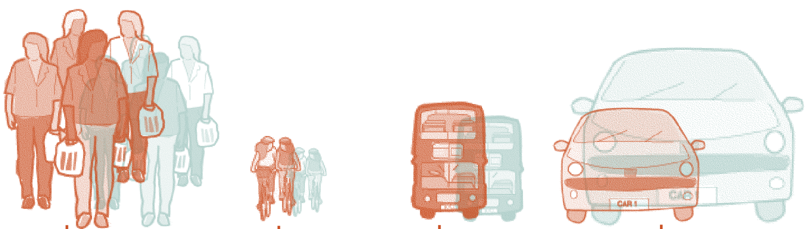
Retailers overestimated the importance of car-borne trade by almost 100%; they estimated that 41% of their customers arrived by car, whereas only 22% had done so. In fact, more than half of shoppers walked to the shops. Walking to neighbourhood shops, and meeting friends and acquaintances there, is an enjoyable social activity, as well as an efficient way of shopping.

Moving away from the car

Interviews with traders, shoppers and neighbours show that local people would like to see the impact of traffic reduced. This is not surprising – many people now have

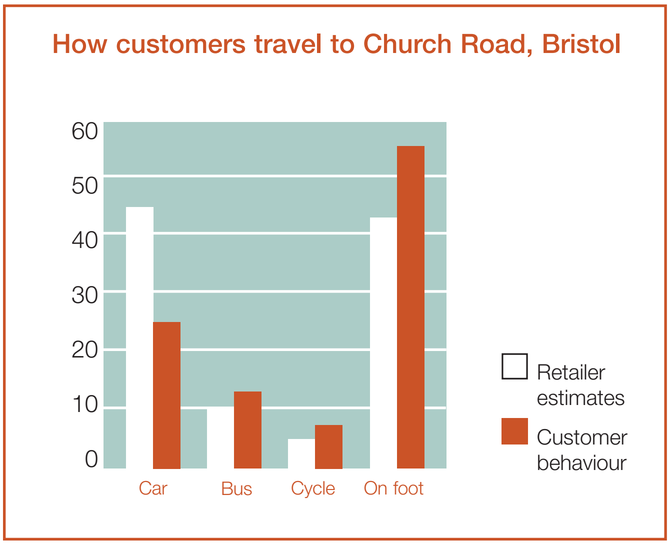
24,500 potential customers live within half a mile of the Gloucester Road survey site

Shoppers' choice of travel modes in Bristol study



55% (42%) | 10% (6%) | 13% (11%) | 22% (41%)

Actual mode of customer travel
(Shopkeepers estimates in brackets)



experience of traffic-free local shopping, often in other European countries. Everyone enjoys shopping in an environment free from the noise, speed, pollution and threat of motor traffic.

The Bristol East Side Traders (BEST) group has studied the area around Church Road, the survey site where bus route improvements are now due, and prepared detailed recommendations for measures to improve the area as a commercial zone and the quality of environment it offers local people.

BEST Enterprise Manager Ian Lawry says "we do face a dilemma; many customers still come by car, and some local businesses would like to see more parking spaces provided, but at the same time the busy and polluted road is a disincentive to shoppers, walking access and crossings are poor, and many traders want environmental improvements."

The Sustrans survey found that only a quarter of shoppers come to Church Road by car, while almost two thirds walk and cycle. Traders, who are clearly very conscious of the transport mix and the need for an attractive retail street environment, nonetheless overestimated the importance of the car by 80%. This misperception creates the risk of mistakes in transport and planning policy.

Changing the road hierarchy

The Sustrans results are closely corroborated by a shopper survey done in the area by Shepherd Epstein Hunter, in 2003. This found that 69% of respondents walked or cycled to the shops, and interestingly that 58% wanted "better traffic control along Church Road". The BEST report suggests considering "a shift in the Road Hierarchy in favour of the pedestrian user".

However, for individual traders, the top priority, by a huge distance, was more car parking (48%). This disparity between the traders' preferences and those of their customers replicates findings in other cities. It may lead traders to push for transport planning decisions which are not in their best interest.

Traders may overestimate the importance of the car because of uncertainty about where customers are travelling from and how they shop. Almost half of the Church Road customers interviewed live within half a mile of the shops, and almost three quarter under a mile. The traders' perception was that 17% came from under half a mile – they underestimate the importance of this local market by almost two thirds.

Many shopping streets need wider pavements

The bicycle is often overlooked - in the UK at least - as a transport mode for shopping

These local customers are also very loyal. Traders believed that as many as one in four shoppers would visit just one store (perhaps the vision is, parking outside) whereas in reality only 13% did so. They thought less than one in ten would visit more than three stores; remarkably, almost 30% did so.

So the picture is of local shoppers, mainly walking to the shops, and visiting a number of stores. Interestingly, this is also a picture of healthy, physically active lifestyles, populous streets and informal contact with other local people. This is the picture that urban planners, public health specialists and community leaders want to see. Sustrans' view is that we should do all we can to support and grow this active, community based local market. Measures to do so are described in the BEST action plan – "widening of the footway, removal of obstructions, resurfacing works, drop kerbs, tactiles etc … and a shift in the Road Hierarchy in favour of the pedestrian user". In other words, restraint of motor traffic.

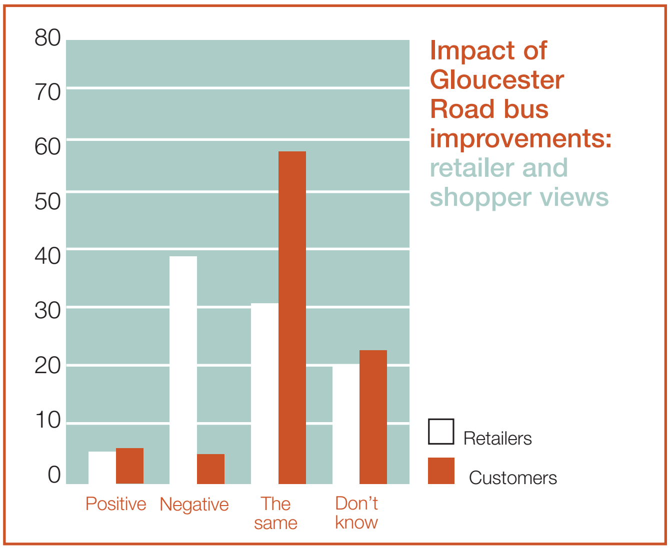
Shoppers' attitudes to bus route improvements

The planned bus route improvements would have an impact on private motor traffic. While they would improve public transport access to the Church Road businesses, this is not the primary objective. Not surprisingly, local traders are concerned that the net impact on their business might be negative. So the survey looked at how traders and their customers viewed the proposed changes, and the picture in Gloucester Road where works have already been carried out.

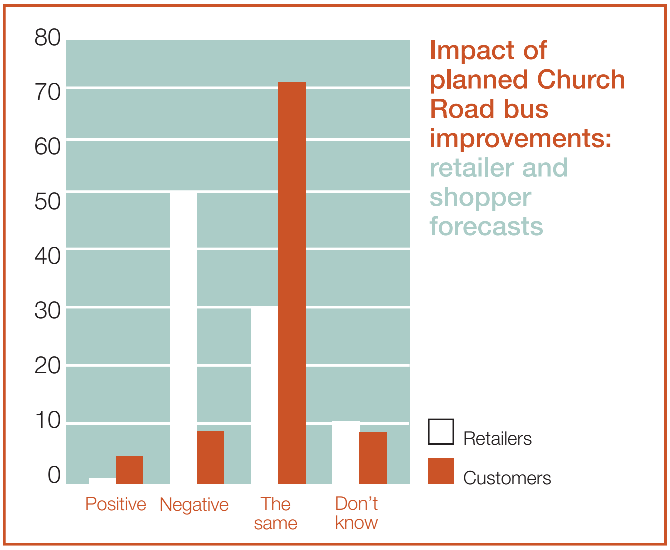
In Church Road, just two percent of traders could envisage a positive impact from the planned improvements, and over half expected their business to be harmed. It is very difficult for a local authority to carry out works in the face of such concern. Among customers however, the balance between positive and negative was much closer; 7% positive and 10% negative. Three quarters thought things would not change. Given that the public are generally cynical about local authority transport measures, and the negative publicity fostered by opponents of the bus route improvements, this lack of concern might be interpreted almost as a vote of confidence.

Shopping locallly can be a real part of community life

Pedestrians visit more shops. We have no evidence that they buy less than car drivers



Impact of Gloucester Road bus improvements: retailer and shopper views



Impact of planned Church Road bus improvements: retailer and shopper forecasts

In Gloucester Road, where much of the planned work is complete, 40% of traders felt the changes had harmed their business. However, when shoppers are asked, 7% claim to shop there less, 8% more, and a massive 59% unchanged. The increase is not statistically significant, of course, but traffic restraint elsewhere in Europe has tended slightly to reduce retail turnover during the first year, before a positive move as customers adjust to the improvements[2], so it is reasonable to expect that these figures will improve. It is difficult, however, to reconcile the negative trader response with the lack of concern expressed by customers.

Please note that traders were not asked "are your takings up or down?", as this might be due to other variables. They were asked "In your opinion, what effect has the Showcase bus route had on trade on Gloucester Road?". One in five responded "Don't know"; it is of course very difficult to isolate the impact of this one variable.

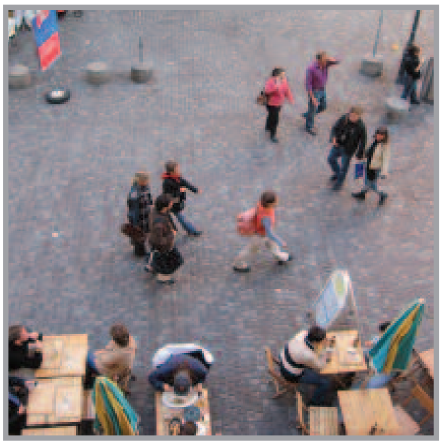
Pedestrians are great customers

Neighbourhood shopping areas often evolved before the era of mass automobile ownership. They are from a time when journeys to local shopping centres would be predominantly on foot. Planners sought to promote accessibility in neighbourhood units within a city, and shopping was usually placed in the centre of the neighbourhood unit to minimise the walking distance from the surrounding residential area[3]. Both of the survey areas have dense residential catchments, and although they now find themselves bisected by major arterial roads, most shoppers still walk.

It is very instructive to analyse how many businesses a shopper will visit, according to their mode of travel. Cyclists and car users make four times as many single-shop visits as pedestrians – on foot, it is so much easier to call in to another shop on the same trip. So almost four out of five pedestrian shopping trips take in two to five shops, compared with three fifths of car or bike trips.

Bus-borne shoppers behave more like pedestrians than car users, with more than three quarters of them visiting two to five shops during each shopping trip. The figures suggest that many car-borne shoppers are "drive-thru" shoppers, stopping to pick up one item on the way to their eventual destination, rather than people for whom shopping is their main purpose for visiting the area. This will have a negative impact on a busy retail street, which is likely to be disproportionate to the extra business that it generates.

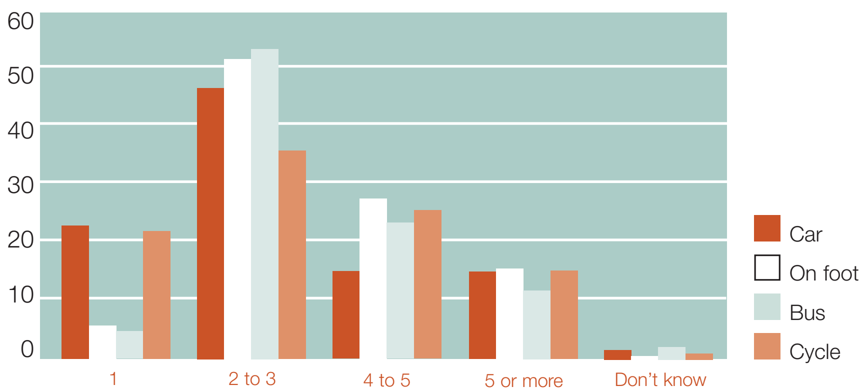
"I'll just be a minute", the negative impact of drive-thru shoppers on a busy retail street may be out of all proportion to the extra business they bring



Many people enjoy continental traffic-free spaces (Zurich)

Who visits most shops?

Number of businesses visited by mode of travel



This evidence indicates that it would be advantageous to local businesses to support measures aimed at attracting more pedestrians and bus passengers to the local shopping centre rather than car users. Major investment in the walking environment, such as wider pavements and traffic restraint measures, should result in attracting more regular, dedicated custom to the area and have a positive impact on retailers and customers alike.

Further reading

Sustrans, 2003, *Traffic restraint and retail vitality* reviewed studies in several UK cities, as well as the Graz study which first brought to light the disparity between retailers' interest in the car and their customers' much broader travel choice.

Ecolane, 2001, *The Impact of Pedestrianisation on Retail Economic Activity* argued that "There is strong evidence of the proven benefits of limited road closures" and that" a large number of studies conducted in Europe and elsewhere show that levels of retail activity are generally improved". However the report also noted that "there can be a reduction in turn-over during a transition period of 1-2 years".

Environ, 1992, *Paved with Gold?* Looked at transport and business in Leicester, and noted that "car borne shoppers are not of overriding importance to trade in Leicester City centre. Numerically, bus passengers are far more important".

Halcrow Fox, 2000, *Central Edinburgh Traffic Management Scheme: Pedestrian Surveys* found that most people arrived by bus (39.5%), followed by people travelling on foot (25.2%). The car had less than 25% of the total transport spread.

Patrick Lingwood, 2000, *Walking in Towns and Cities, Select Committee on Environment, Transport and Regional Affairs* is forthright. "the range and quality of facilities offered by local centres, especially the availability of food shops, is an important determinant of the extent to which people use neighbourhood centres, rather than travel to centres elsewhere. The availability of facilities is substantially more important than other transport related factors such as public transport or parking".

Transport for London, 2004, Retail Monitoring: Shopper Satisfaction Survey 2004

Transport and Travel Research Ltd, 2002, The Impact of Sustainable Transport Policies on the Travel Behaviour of Shoppers- Final Report

Transport for London, 2004, Making London a Walkable City

For more information
www.vivaldiproject.org

References

1. **Socialdata, 1991,** *Sanft Mobilitat*
2. **Ecolane, 2001,** *The Impact of Pedestrianisation on Retail Economic Activity*
3. **Patrick Lingwood, 2000,** *Walking in Towns and Cities, Select Committee on Environment, Transport and Regional Affairs*

Photo credits: Sustrans staff

Most British cities have given top priority to the car...

... but people enjoy a more human environment for shopping

What is VIVALDI?

VIVALDI is a €40 million, four-year project, co-funded by the EU CIVITAS initiative. It involves five European cities: Bristol; Bremen (Germany); Nantes (France); Aalborg (Denmark) and Kaunas (Lithuania). Bristol City Council co-ordinates the project, and other local partners include Sustrans, Dial-a-Ride, First Bus and the University of West of England.

The VIVALDI initiatives in Bristol include improved "showcase" bus corridors, the Dings home zone, clean fuel vehicles, improved transport information, TravelSmart individualised travel marketing campaigns, new walking and cycling routes and a range of other improvements.

Further information

For further information on the **Bristol retail travel study**
visit **www.sustrans.org.uk/liveableneighbourhoods**
email **liveableneighbourhoods@sustrans.org.uk**
or call **0117 926 8893.**

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