Drivers do not spend more, but they cost more: incentivising access to UK shopping centres by public transport and walking

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Summary

- What retailers think about cars & parking
- The behaviour of shoppers in centres owned by The Mall Corporation
- Similar experience from other UK Centres
- Conclusions

What retailers think about cars & parking

What most retailers believe

Study	Bus		Car		Walk		Bike	
	Actual %	Shopkeepers Perception %	Actual %	Shopkeepers Perception %	Actual %	Shopkeepers Perception %	Actual %	Shopkeepers Perception %
Graz	16	12	32	58	44	25	8	5
Bristol	13	11	22	41	55	42	10	6

What experience shows

- York – retailers reported 20-30% increase in turnover following pedestrianisation
- Hass-Klau 1993 – ‘many [German] towns show increases in the region of 20-40%’ after pedestrianisation
- There is even a ‘knock-on’ positive effect upon retailers <u>outside</u> the pedestrianised area
- A Leicester study showed that vacancy rates are higher where there is higher traffic flow

The behaviour of shoppers in centres owned by The Mall Corporation

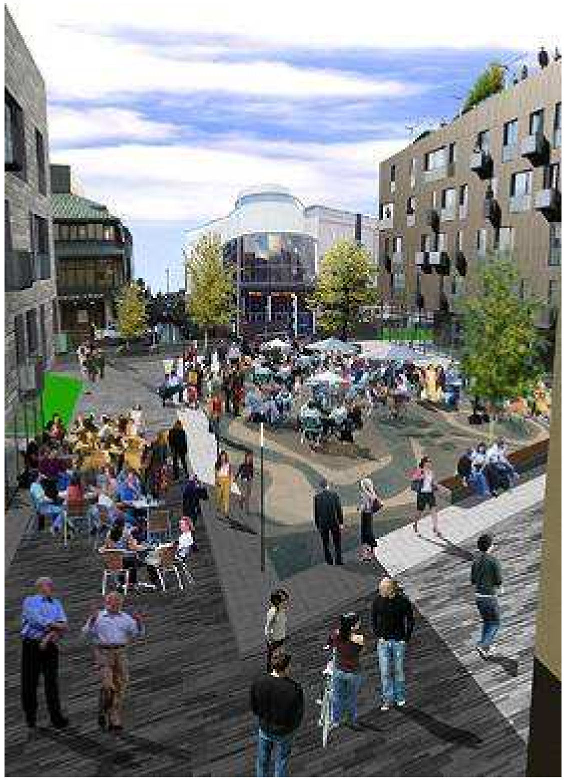
The Mall Corporation

- The largest portfolio of branded shopping centres in the UK
- 17 sites
- All in town and city centres
- All centres have substantial paid-for car parking. Most car parks are owned by The Mall, but some are council owned (and therefore lack investment)
- We have looked at six of them
- We will feature four


Norwich


Uxbridge


Walthamstow

Ilford



Sutton Coldfield


Bristol

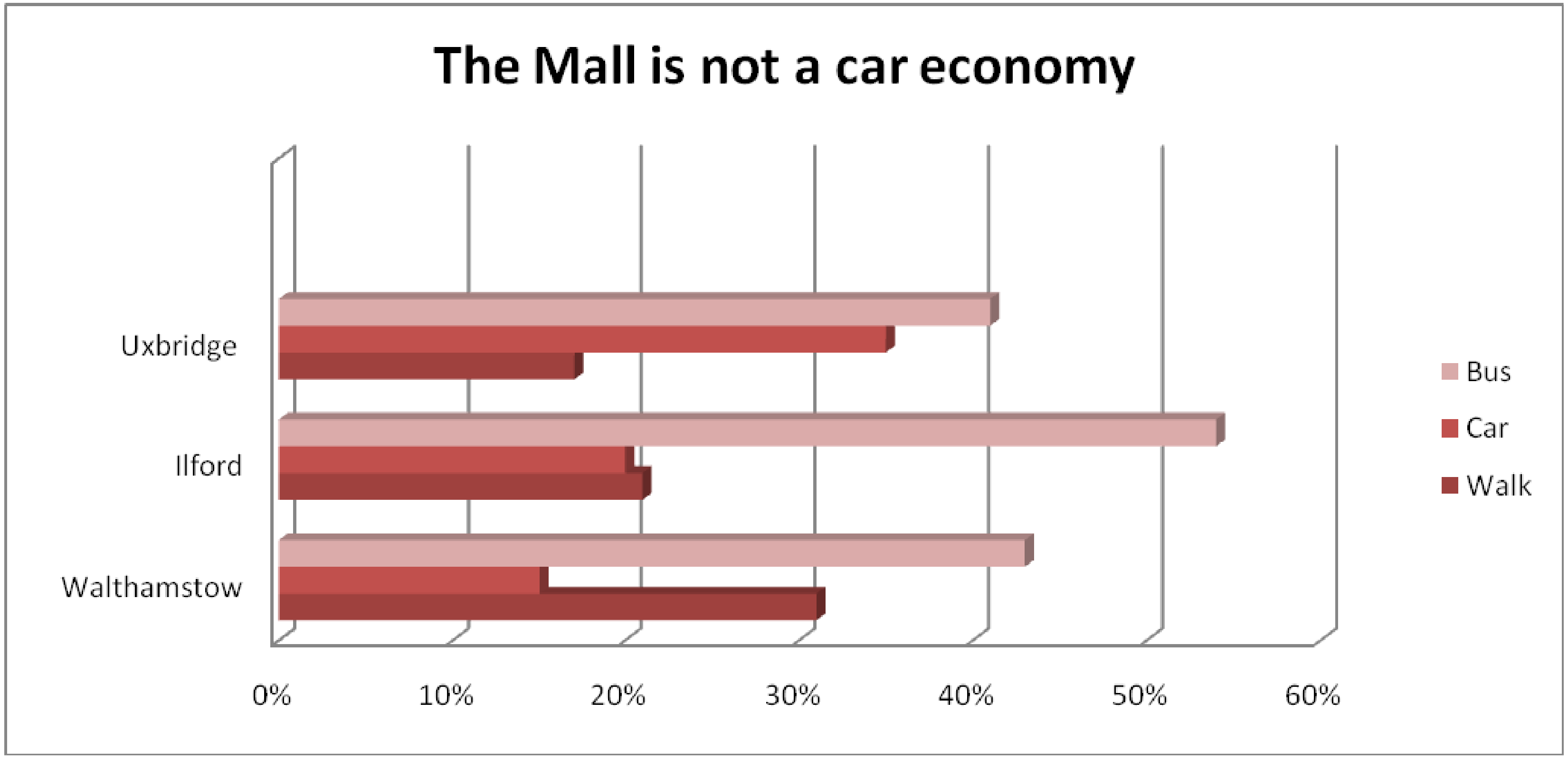
The Mall Corporation

- Norwich – historic, cathedral city
- Bristol – thriving big development city
- Walthamstow – upcoming city-centre area dominated by the young
- Ilford – east London suburb
- Uxbridge – university-dominated market town
- Sutton Coldfield – wealthy dormitory town in Birmingham

Conditions of survey

- Data from ROI Group
- Exit survey (doesn't include those <u>not</u> shopping)
- Minimum 300 full interviews per centre per year
- Negligible number of cyclists

Survey findings



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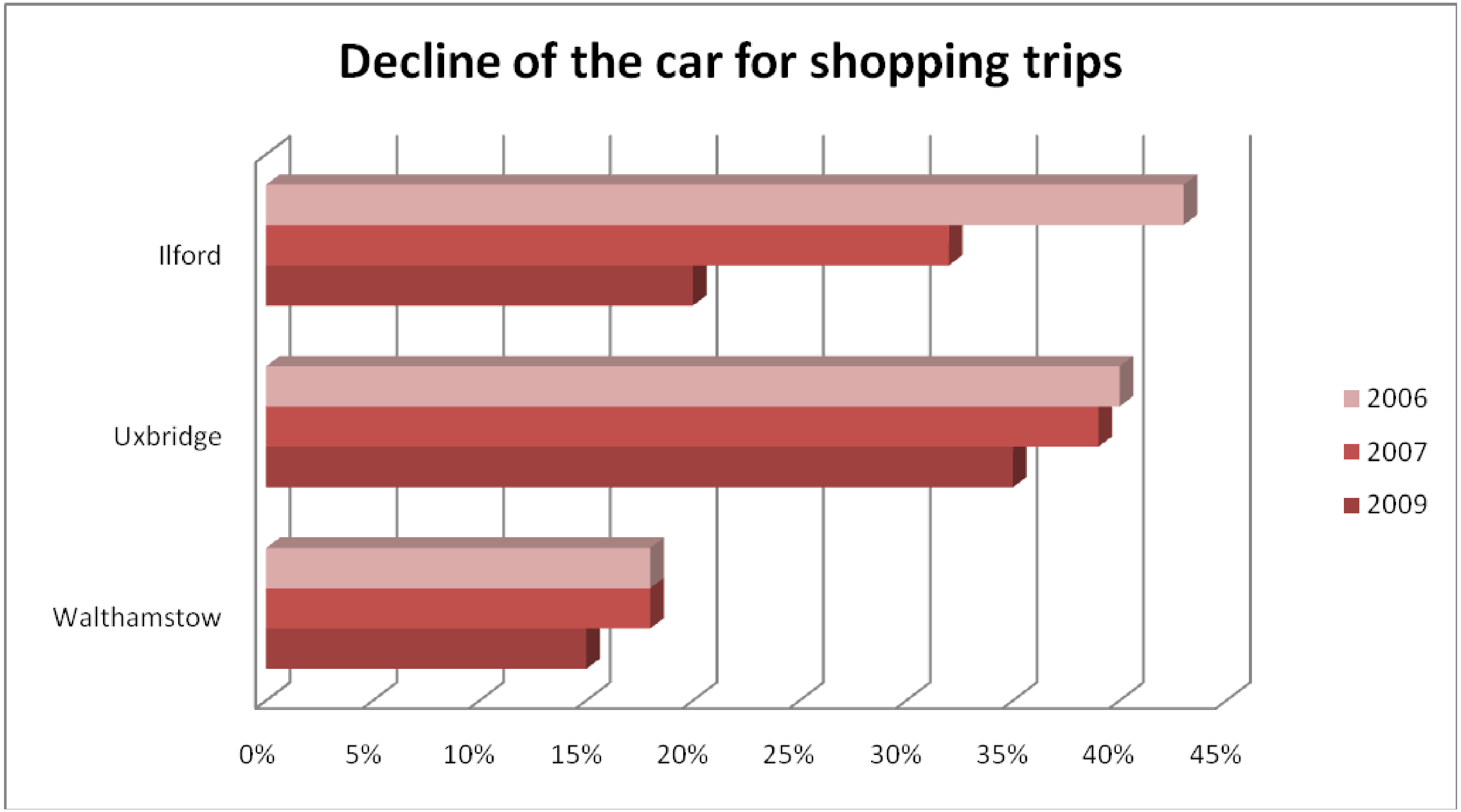

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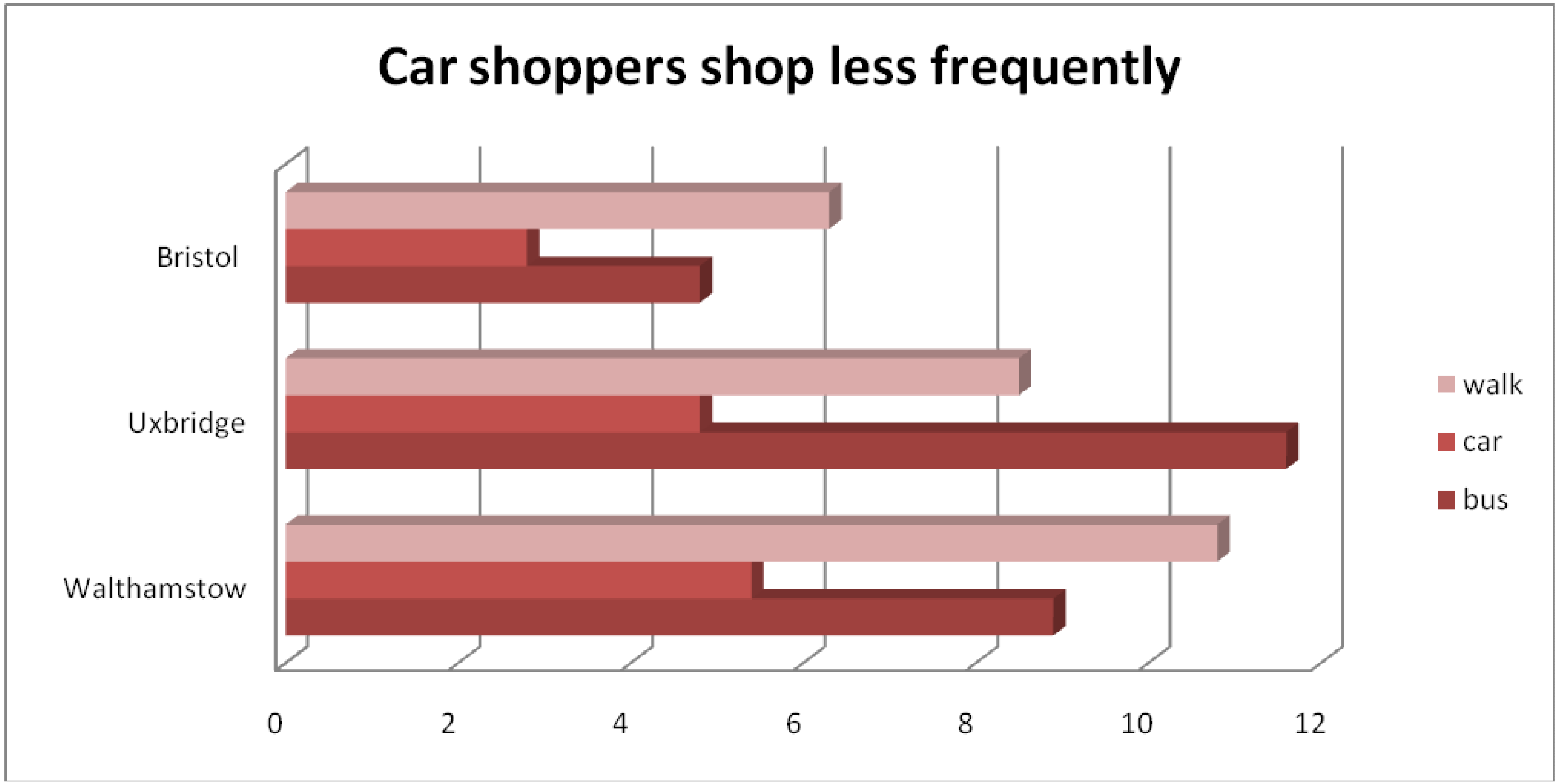

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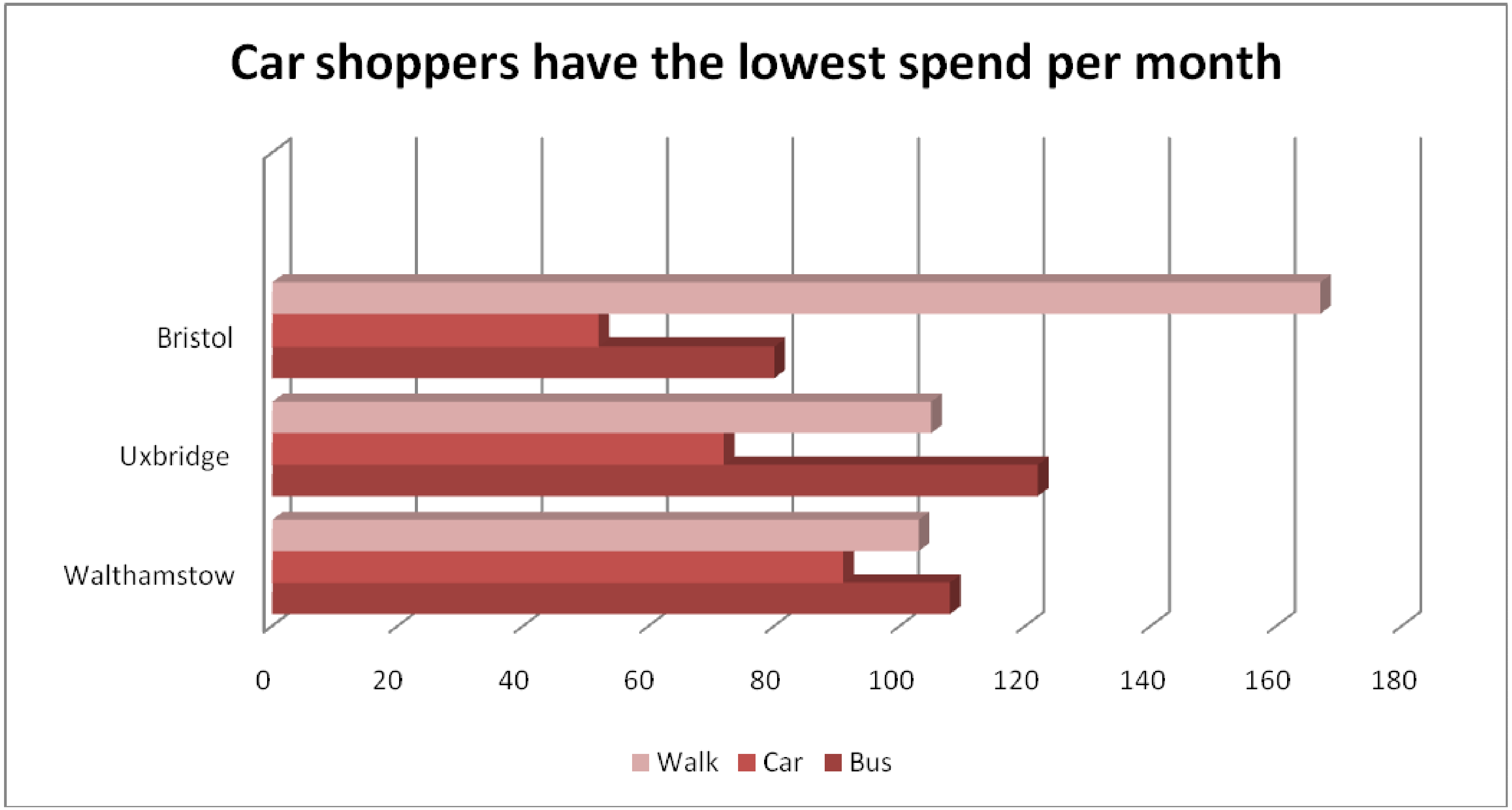

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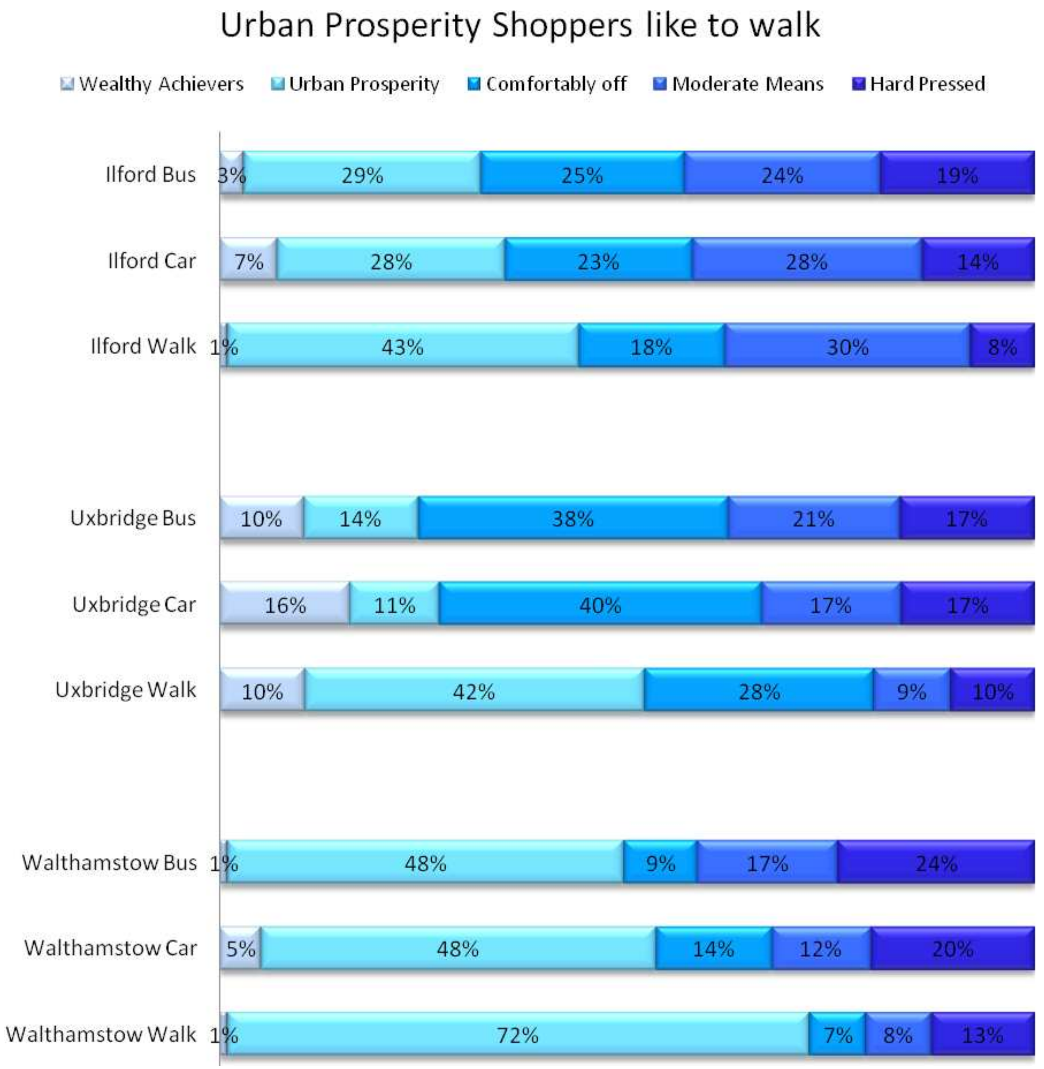

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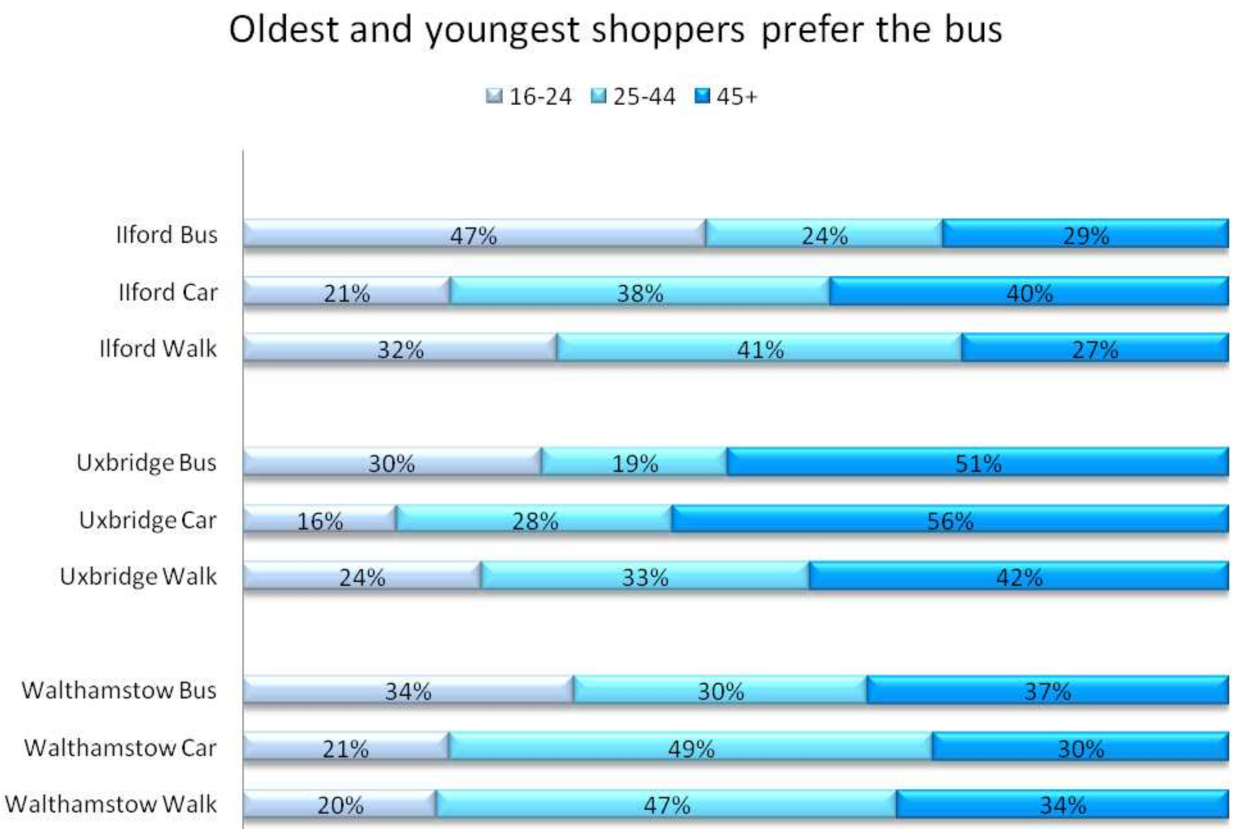
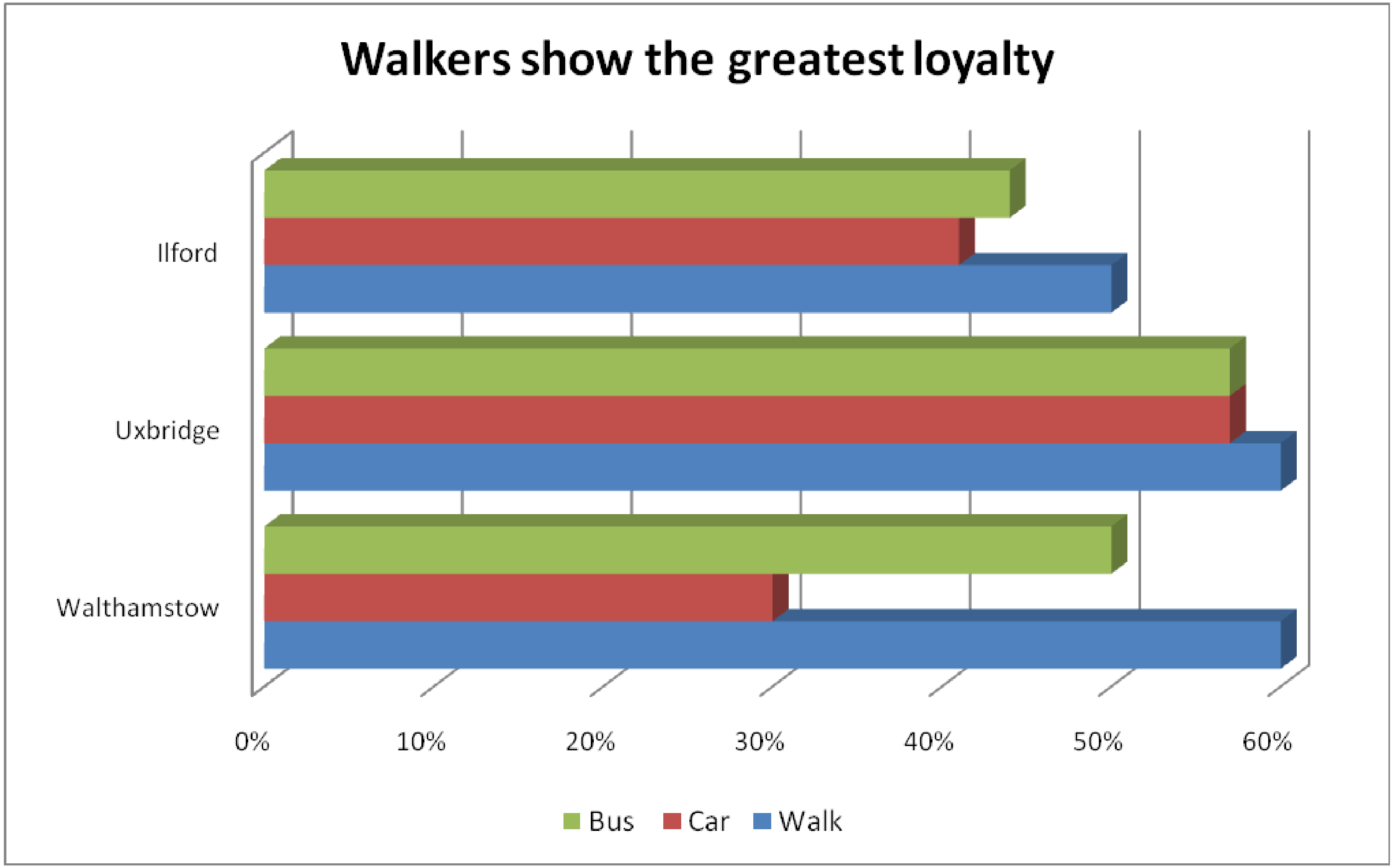


Survey findings



Question: What is your opinion of this Mall?
% of respondents agreeing with 'I couldn't get along without it'

Similar experience from other UK Centres

Camberwell shoppers survey 2008

- Around 1000 surveys completed
- Admittedly low level of car use (4%)
- The highest spenders were walkers, followed by bus travellers

TfL's bus user study 2009

Walk	£135.89
Bike	£114.27
Bus	£105.45
Taxi/minicab	£105.03
Car	£94.91
Train	£89.21
Tube	£86.53

Average spend per month, per mode
4,637 users across 15 London
town centres

Conclusions

Conclusions

- Gradual decline in car-borne shoppers accessing individual centres
- Shoppers arriving by public transport & walking are often from high socio-economic categories
- Local ‘walk-up’ market has high spending power
- <u>However</u> major retailers now only need 75 stores to reach 50% of the population. 20 years ago it was 175 stores. This is probably due to increased mobility – by car.

Incentivising access

- Incentive for changes to planning regime?
- Retail centres should make a virtue of not catering for the car
- Marketing initiatives to incentivise non-vehicular modes (e.g. ‘we will refund your bus fare’)
- A prompt for wider town centre regeneration

Thank you

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