



SHARED INTELLIGENCE



Evaluation of Outer London Fund projects in Wood Street and Blackhorse Lane – Baseline data report

January 2013

1. INTRODUCTION

1.1. This report provides the baseline data for the evaluation of Outer London Fund (OLF) projects in Wood Street and Blackhorse Lane in the London Borough of Waltham Forest.

Context

1.2. The London Borough of Waltham Forest has prioritised the **sustainable regeneration of its high streets** and town centres, reflecting their importance to the economy, job market and identity of the borough. The 2010 strategy *High Street Life in Waltham Forest* sets out a series of principles for “improving the quality, environment, aesthetic and legibility of the borough’s high streets and shop-fronts as major community and economic assets”.

1.3. Guided by the strategy, the council will invest over £11m in high street regeneration over the next two years, through a combination of:

- **Shop-front and facia improvements**, including the innovative ‘shopportunity’ programme;
- **Public realm works**, including improved signage, pavements and surfacing, and art interventions; and
- In some areas, **highway interventions** including changes to lighting, roads, junctions and traffic management.

1.4. As part of this investment, the council has secured **£2.5m from the Outer London Fund**; £1.5m for Wood Street and £1m for Blackhorse Lane. The purpose of the Outer London Fund is to boost local high streets by delivering economic growth, creating new jobs and involving young people in business and training.

1.5. Wood Street is a small high street with significant opportunities in terms of niche trade and specialist retail. The redeveloped plaza and indoor market offer opportunities to boost the appeal of the area, which has a low vacancy rate and a number of long-term and locally well-known shops.

1.6. The priorities for development in Wood Street include:

- Continued shop-front improvements through ‘Shopportunity’
- Art interventions, feature lighting and planting;
- Improvements to the public realm, including enhancement of the plaza and play areas;
- Marketing; and
- Business support.

1.7. Blackhorse Lane is a key growth area within the Upper Lea Valley Opportunity Area with a strong base of small- medium-sized businesses and a number of sites for housing-led mixed use development. The AAP preferred options identify the opportunity to build 2,400 new homes and 1000 new jobs, including through commercial and creative industry growth. The area also abuts the Walthamstow Wetlands and reservoir which creates further development opportunities.

1.8. The priorities for development in Blackhorse Lane include:

- Improvements to shop-front and fascias;
- Improved linkages including links to the Wetlands;
- Public realm improvements, including the area around the station; and
- Support for the development of a creative cluster.

1.9. Both projects will be measured against Outer London Funding economic uplift criteria:

- New jobs created
- Jobs secured
- % increase in business turnover
- % increase in footfall
- % increase in visitor satisfaction rate
- Young people receiving business support or training
- Young people places in apprenticeships
- % reduction in vacancy rate

1.10. The evaluation needs to take account of the Outer London Fund criteria and, through the additional elements, the opportunity to identify important lessons for high street regeneration in Waltham Forest.

Methodology

1.11. The data was gathered in three different ways:

- Footfall counts
- Face-to-face surveys with visitors
- Face-to-face and telephone surveys with local businesses

1.12. The research was carried out by a team from Shared Intelligence (Si) and Ingham Pinnock Associates.

1.13. The questions for businesses were slightly different. Specifically, additional questions were added to the Blackhorse Lane survey to bring the baselining exercise into line with a separate piece of research also being undertaken in the area. Otherwise, the methods used were the same on both sites. The data is set out separately for each site.

Updated data collection

1.14. Following completion of the OLF projects in Wood Street and Blackhorse Lane, the data will be updated in March to April 2014, followed by the preparation of key lessons from the evaluation.

2. WOOD STREET

2.15. The research for Wood Street was carried out between October and November 2012.

Footfall count

2.16. The footfall count was carried out on four separate occasions outside the Casa 95 cafe:

- Morning of 24th October: 573 people
- Afternoon of Thursday 25th October: 602 people
- Midday of Saturday 3rd November: 539 people
- Midday of Sunday 4th November: 309 people

2.17. Two weekend sessions were carried out, to inform discussions about the preferred weekend opening days for the indoor market.

Visitor surveys

2.1. The research team completed 31 surveys with visitors to Wood Street. Of the sample, 9 were men and 22 women.

Main purpose and regularity of visit

2.2. Just over half of the respondents – 16 people – described their main purpose for visiting as ‘Other’. In response to follow-up questions, picking up children and having a stroll were given as reasons for visiting. A further 22%, or 7 people, were ‘**Using a service**’ e.g. using the Post Office in the plaza. Only 3 people – **less than 10%** – had visited for either ‘**Convenience**’ or ‘**Comparison shopping**’.

2.3. **83% of respondents** visited Wood Street **every day** or **more than once a week**.

2.4. Both of these sets of figures may reflect the fact **77% of the visitors** described themselves as ‘**Locals – living the same postcode**’.

Time spent in Wood Street

2.5. 38% of respondents planned to visit for ‘between 10 minutes and one hour’. 26% planned to visit for ‘more than two hours’. 13% each planned to visit for ‘less than ten minutes’ and for ‘one to two hours’.

Travel source and other destinations

2.6. As set out above, **77%** of the respondents described themselves as ‘**Locals – living the same postcode**’. The rest were ‘Visitors from a post code less than 30 minutes away’. There were no ‘Tourists’ i.e. people who had come from further than a thirty minute drive.

2.7. 71% of respondents stated that they also regularly visited ‘Other **neighbourhood centres in the Borough** – like Walthamstow or Leyton’ but **did not visit ‘Other large centres** like Stratford City’.

Planned spend

2.8. Responses to the question about how much they planned to spend during the visit to Wood Street were fairly spread, but were more focused on **lower levels of expenditure**. 22% planned to spend ‘Under £5’, and 26% ‘Between £5 and £10’. However, 10% planned to spend ‘Between £10 and £100’.

2.9. 16% of people planned to spend more than they had 12 months ago. 30% of people stated that they would spend less. The rest were unsure.

Satisfaction with physical appearance of the public space

- 2.10. When asked about their satisfaction with the physical appearance of Wood Street, **84%** rated physical appearance as either **'Good' or 'Very Good'**. The same percentage had stated they **had seen an improvement** in the physical appearance over the last year.

Satisfaction with physical appearance of shop fronts

- 2.11. Respondents were less positive about the physical appearance of the shop fronts, but the overall picture was still generally positive. 58% rated the shop fronts' appearance as 'Very Good' or 'Good'. Although a slight **majority of respondents - 54% - had not seen an improvement** over the last year.
- 2.12. When asked if improved shop-fronts would make them more likely to go into a shop, 81% 'Definitely agreed' and 'Somewhat agreed' that it would make them more likely to shop.

The council's investment

- 2.13. The large majority of respondents - **76%** - **said that Council's investments in Wood Street have made things better**. 16% did not notice any difference and 6% said investments have made things worse.

Variety of shops

- 2.14. The responses to the questions about the variety of shops in Wood Street were mixed. 58% said stated that the variety was either 'Good' or 'Very Good'. 42% of respondents rated the variety of shops as either 'Poor' or 'Very Poor'.
- 2.15. When asked what services/shops are missing in Wood Street, the most common suggestions were a bank and a supermarket, particularly Tesco.

Satisfaction with Wood Street as a whole

- 2.16. 66% of residents were either 'Satisfied' or 'Very Satisfied' with Wood Street as a whole. 23% were 'Neither satisfied nor unsatisfied' while 10% were either 'Unsatisfied' or 'Very Unsatisfied'.

Transport and access to Wood Street

- 2.17. The most popular travel options for arriving at Wood Street were 'By Foot', making up 48% and 'By Public Transport', accounting for 39%. The rest arrived by car. No respondents had cycled to Wood Street.
- 2.18. 49% either 'Somewhat disagreed' or 'Definitely disagreed' with the statement that "Wood Street is an easy place to get to". 9% 'Agreed' while nobody 'Strongly agreed'. 19% had no view.

Business survey

- 2.19. The research team completed **62 surveys with businesses** in Wood Street.
- 2.20. The respondents were spread between **different types of business**. 34% were 'Comparison Retail', 42% were 'Convenience Retail', 18% were 'Hospitality' and 6% were 'Commercial / professional'. The vast majority – **95%** - **were Independents**, reflecting the number of small and specialist businesses in the area.

Length of time in Wood Street

- 2.21. The length of time that the business had been active was also fairly spread. 13% had been in the area for less than a year. 19% had been operating for between one and five years. 27% had been operating for between five and ten years. 30% had been in Wood Street for more than ten years. A small number of respondents couldn't answer or were unsure.

Number of employees

- 2.22. The vast majority of businesses – **85% - employed between one and four people** and about a third of that number employed only one person. 6% had between five and nine employees. 3% employed between 20 and 49 people.

Turnover and footfall

- 2.23. 48% of businesses stated that turnover had decreased over the previous twelve months; 11% stated that it had increased; 29% stated that it had more-or-less stayed the same.
- 2.24. The responses for footfall were similar. 45% stated that footfall had declined; 16% stated that it had increased; while 26% reported that it was about the same as last year.

Jobs and investment

- 2.25. **77%** of businesses reported that they had **not increased or decreased the number of jobs** over the preceding twelve months. 15% had lost jobs, all saying that they had lost one job during the period. 8% had increased the number of jobs, but **only one business linked this to council investment**.
- 2.26. **8% of businesses** stated that they had made **additional investment as a result of the council's investment** in Wood Street.

Business confidence and plans

- 2.27. **39%** of respondents stated that they thought their businesses would **perform 'Slightly better' or 'Significantly better'** over the next twelve months. 37% thought business would be the same. 17% thought business would be 'Slightly Worse' or 'Much Worse'.
- 2.28. In terms of businesses' plans for when their lease came up, 6% said they would renegotiate; 37% planned to renew; and 8% said they planned to terminate. 34% already owned their property, while 15% were unsure or declined to say.

Overall attitude and appearance of Wood Street

- 2.29. What asked to rate their overall attitude to the area, 18% were not at all proud; 28% were not very proud; 29% were fairly proud of the local area; while 16% were very proud.
- 2.30. Asked to describe how the overall appearance of Wood Street had changed over the preceding three years, 8% stated that it had declined and become run down; 13% felt it had deteriorated; 13% stated it had not changed; 36% felt it had Improved slightly; 21% felt it had improved significantly. In total, **just under half – 47% – said Wood Street had improved**.

Issues affecting businesses

- 2.31. In response to an open-ended question about other issues affecting their business, by far the most significant was the **lack of parking for businesses and customers**. This was seen as causing unnecessary costs and problems for business owners and employees, as well as current and potential customers.
- 2.32. In addition to parking, some pointed out that while the redevelopment of the plaza had brought benefits e.g. it was more welcoming to young children and parents, the new layout lacked trees and greenery and was unpopular with older people who didn't like the slippery surface caused by the fountain. A few respondents called for more action to attract offices and other employers as well shops.

3. BLACKHORSE LANE

3.33. The research for Wood Street was carried out between November and December 2012.

Footfall count

3.34. The footfall count was carried out on three separate occasions at the small parade of shops on Blackhorse:

- Morning of Tuesday 4th December: 401 people
- Afternoon of Wednesday 5th December: 621 people
- Midday of Saturday 8th December: 425 people

Visitor survey

3.35. The research team completed 20 surveys with visitors to Blackhorse Lane. Of the sample, 8 were men and 12 were women.

Main purpose and regularity of visit

3.36. The most common purpose – 45% – for visiting was ‘Other’, often people going to college or travelling through the area. 25% were visiting for work. 20% were visiting to use a service.

3.37. 50% of the respondents also visited daily and a further 15% visited more than once per week. 20% visited on a weekly basis while 10% were first time visitors.

Time spent in Blackhorse Lane

3.38. The amount of time that visitors planned to spend in the area was fairly evenly spread. 30% planned to spend up to ten minutes; 20% for between ten minutes and an hour; 10% for one to two hours; and 25% for over two hours. The rest were unsure.

Travel source and other destinations

3.39. **50% of respondents** described themselves as ‘**Locals – living the same postcode**’. 25% were ‘Visitors from a post code less than 30 minutes away’. 10% were ‘Tourists – from a post code further than a 30 minute drive’.

3.40. The response to the questions about other destinations was also spread. 20% replied that they regularly visited ‘Other **neighbourhood centres in the Borough** – like Walthamstow or Leyton’ but **not ‘Other large centres** like Stratford City’.

3.41. 30% visited both types of centre, while 20% visited neither. Only 10% did not visit local centres but did visit larger centres like Stratford.

Planned spend

3.42. Planned expenditure in the area was low, reflecting the fact that the majority had visited for none-retail purposes. 60% planned to under £5. 25% planned to spend between £5 and £10. 5% planned to spend between £10 and £25. The rest were unsure.

3.43. Compared to the same spend last year, 15% said they would spend more; 10% the same; 35% said they would spend less. The rest were unsure or the question did not apply.

Satisfaction with physical appearance of the public space

3.44. Asked about their satisfaction with the physical appearance of Blackhorse Lane, 40% rated it ‘Good’, with nobody rating it ‘Very good’. 45% rated it ‘Poor’ while 15% rated it ‘Very Poor’.

- 3.45. **70%** stated they **had seen no improvement** in the physical appearance over the last year. 20% had and 10% were unsure / could not comment.

Satisfaction with physical appearance of shop fronts

- 3.46. Views on the physical appearance of shop fronts in Blackhorse Lane were mixed but tended toward the negative. 45% rated them as 'Good'; 45% as 'Poor'; and 10% as 'Very poor'. No respondent described them as 'Very good'.
- 3.47. **70%** of respondents had **not seen an improvement** over the last year. 20% had seen an improvement, while 10% had no opinion.
- 3.48. 35% of respondents 'Definitely agreed' that improved shop-fronts would make them more likely to go into a shop, and another 25% 'Somewhat agreed'. However, 5% 'Neither agreed nor disagreed' while the remaining 35% didn't know.

The council's investment

- 3.49. 20% of respondents argued that the council's investment had 'Made things better'. 55% felt that it had made no difference. 15% had 'Not noticed any change', while 10% had no opinion. Nobody stated the investment had made things worse.

Variety of shops

- 3.50. 55% of respondents rated the variety of shops as 'Poor' and a further 10% as 'Very poor'. 30% rated the mixture as 'Good' and none as 'Very Good'. 5% had no opinion.
- 3.51. When asked what services/shops were missing in Blackhorse, the main suggestions were a dry-cleaner, a supermarket (Tesco's was again mentioned specifically), food shops and an ATM.

Satisfaction with Blackhorse Lane as a whole

- 3.52. General satisfaction responses about the area as a whole were mixed but tended toward the negative. 10% were 'Very satisfied' and a further 20% were 'Satisfied'. A further 20% were 'Ambivalent'.
- 3.53. 30% were 'Unsatisfied' and 5% were 'Very unsatisfied'. 15% had no view. Without being prompted, three respondents explained that their 'Unsatisfied' / 'Very unsatisfied' ratings were due to traffic and pollution.

Transport and access to Blackhorse Lane

- 3.54. The most popular travel option for arriving at Blackhorse Lane was public transport, accounting for 70% of respondents. 10% arrived on foot and 5% cycled.
- 3.55. 35% of respondents agreed 'Strongly agreed' that Blackhorse Lane was an "an easy place to get to" and a further 30% "Agreed". 10% neither agreed or disagreed. 5% 'Somewhat disagreed' and nobody 'Definitely disagreed'. 20% were unsure or had now view.

Business survey

- 3.56. The research team conducted 24 surveys with businesses in Blackhorse Lane between November and December 2012.
- 3.57. The respondents were spread between **different types of business**: 29% were 'Comparison Retail'; 21% were 'Convenience Retail'; 13% 'Commercial / professional' and 8% were 'Hospitality'. 29% were categorised as 'Other' e.g. distribution.
- 3.58. Most – **88% - were Independents**, 12% were National Multiples and 4% categorised themselves as 'Other'.

- 3.59. Reflecting the mixture of businesses, the nature of outputs varied considerably, from food and catering services, personal services such as hair-cutting and dry-cleaning, training provision, accountancy, the sale of household goods, and repairs, maintenance and installation.

Length of time in Blackhorse Lane

- 3.60. The length of time that the business had been active was also fairly spread. Only 8% of businesses had operating in the area for less than one year. 25% had been there between for one to five years. 21% had been in operation for five to ten years; and 46% had been in operation for more than ten years.

Number of employees, local employees and young people in training

- 3.61. The majority of businesses – **71%** – **employed between one and four people**. 17% had between five and nine employees. 12% employed between 20 and 49 people.
- 3.62. 50% of businesses employed only locals. 20% did not have any local employees. The rest estimated that between one half and two thirds of their employees were locals.
- 3.63. Only one employer had a young people in training. In the case, they were one of the larger employers in the sample and had four young people in training. One employer had taken on one apprentice.

Turnover and footfall

- 3.64. Just over half – 54% – of businesses stated that turnover had been stable over the previous twelve months. 33% reported that turnover was down. 8% reported an increase, while 4% were unsure. Most businesses who reported a decrease in turnover estimated it had been around 20%.
- 3.65. The responses for footfall were comparable. 56.25% of businesses reported a decrease in footfall over the previous twelve months. 12.5% reported an increase. 31.25% stated that turnover had been stable.

Jobs and investment

- 3.66. 67% of businesses had **not increased or decreased the number of jobs** over the preceding twelve months. 17% had lost jobs. 8% had created new jobs, while 8% were unsure.
- 3.67. **No businesses** linked additional jobs or job retention to council investment. One business did state that they had made **additional investment as a result of the council's investment** in the area.

Business confidence and plans

- 3.68. In terms of overall business confidence over the next twelve months, responses were mixed but tended toward the positive. 50% of businesses expected to do 'Slightly better' with a further 8% expecting to do 'Significantly better'.
- 3.69. 21% expected business to be about the same. 17% of respondents expected things to be 'Slightly worse', with a further 4% expecting business to be 'Significantly worse'.
- 3.70. With regard to plans for when their lease came up, the most common answer - 54% - was not applicable or unsure, because they owned their own premises, the decision was not theirs to take or it was tied up with further financial considerations. 25% planned to renew, while 13% planned to terminate.

Issues affecting business

- 3.71. General issues affecting their business mentioned during the surveys included the need for more and more convenient parking; traffic making the area unappealing to customers; and the need for a greater mix in the area of housing, shops and leisure retail like coffee shops.