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On behalf of Tameside Council

Volume 3 – Findings of Pedestrian Surveys

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1 INTRODUCTION

- 1.1 In Volume 3, we present the findings of a survey of pedestrians in each of the five main town and district centres in Tameside, undertaken by NEMS Market Research in July 2017. NEMS interviewed a total of 607 pedestrians, comprising 200 pedestrians in Ashton-under-Lyne Town Centre, 100 pedestrians in Hyde Town Centre, 103 pedestrians in Denton Town Centre, 101 pedestrians in Droylsden District Centre and 103 pedestrians in Stalybridge District Centre. The questionnaire used in the survey is reproduced in Volume 2 of our report, which also contains the Excel database of the survey findings.
- 1.2 The National Planning Practice Guidance (the PPG) lists ten health check indicators which can be used to determine the health of town centres. The findings of the survey form a key input into the *'customers' views and behaviour'* health check indicator, and also inform other indicators such as *'accessibility'*, *'perception of safety and occurrence of crime'* and the *'state of the town centre's environmental quality'*.
- 1.3 The remainder of this Technical Paper is structured as follows:
- **Section 2** covers mode of travel and frequency of visits to each of the five main centres covered by the pedestrian survey;
 - **Section 3** identifies the main purpose of visit to each centre;
 - **Section 4** outlines the respondents' likes, dislikes and suggestions for improvement;
 - **Section 5** identifies the types of shops and leisure facilities perceived to be lacking in each of the centres;
 - **Section 6** identifies customer satisfaction rankings for each centre in relation to: the retail, leisure and service offer; a range of factors relating to their environmental quality and perceptions of personal safety; and a range of factors relating to accessibility by a variety of means of travel;
 - **Section 7** identifies the propensity for linked trips in each of the centres;

- **Section 8** reports the findings in relation to various questions about health and disability; and
- **Section 9** sets out our overall conclusions from the pedestrian surveys in each of the five centres.

2 MODE OF TRAVEL AND FREQUENCY OF VISITS

- 2.1 There is some variation across the five town and district centres in terms of mode of travel for visitors, whether expressed as a proportion of trips to the centre, or as a proportion of people visiting the centre.¹ Some difference is to be expected, given the variation in car ownership and wealth in the catchment areas of each of the centres.
- 2.2 In particular, we note that the 2011 Census findings show that a high proportion of households with no car are located in the wards closest to Ashton-under-Lyne Town Centre. For example, in the St Peters ward, which contains the majority of Ashton-under-Lyne's Town Centre, 50.1% of households had no cars or vans in 2011. This is considerably higher than the Tameside average of 29.6% and the North-West average of 28.0%. On the other hand, some of the wards closest to Denton Town Centre had a lower than average proportion of households with no car, such as Denton North East (27.5%), Audenshaw (23.6%) and Denton West (21.8%). Some wards in the North-East of Tameside also had low proportions of households with no car in 2011, including Mossley (22.8%) and Stalybridge South (19.0%).
- 2.3 Thus, the pedestrian survey confirms (Table 1), in terms of **trips** (un-weighted), that:
- Ashton-under-Lyne Town Centre is most reliant on car-borne trips (62.5% of journeys to the centre were made by car) and least reliant on walk-in trips (11.0% of visits were made on foot);

¹ If Person A visits a town centre five times per week and Person B visits once per week, then Person A is five times more likely to be interviewed in a pedestrian survey than Person B. Thus, the un-weighted findings become a sample of trips to the centre. In order to express the findings as a proportion of people who visit the centre, the results need to be weighted by the inverse of the frequency of visit. For mode of travel, both weighted and un-weighted results are relevant, but for all other questions we utilise the un-weighted results, which express the findings as a proportion of trips

- Droylsden District Centre is the most reliant on walk-in trips (29.7% of visits to Droylsden were made on foot) and, correspondingly, least reliant on car-borne trips (45.5% of journeys to Droylsden were by car) and trips made via public transport (18.8% of visits were made by bus, train or Metro);
- Denton Town Centre is the most reliant on public transport trips (27.2% of trips), followed closely by Hyde Town Centre (27.0% of trips); and that
- a fairly high percentage of trips to Stalybridge District Centre were made on foot (27.2%), with relatively few car-borne trips (46.6% of visits were via car).

Table 1: Mode of Travel to Town Centre (% of Trips)

Centre	Car	Bus	Train/ Metro	Taxi	Bicycle	Walk	Other	Total
Ashton-under-Lyne	62.5	22.5	2.5	1.0	0.5	11.0	0.0	100.0
Hyde	54.0	27.0	0.0	2.0	1.0	16.0	0.0	100.0
Denton	51.5	27.2	0.0	2.9	0.0	18.5	0.0	100.0
Droylsden	45.5	16.8	2.0	1.0	5.0	29.7	0.0	100.0
Stalybridge	46.6	23.3	1.0	1.9	0.0	27.2	0.0	100.0

2.1 In terms of **people** (weighted), Table 2 confirms that:

- Ashton-under-Lyne Town Centre is, again, least reliant on walk-in trips (with only 1.0% of survey respondents having arrived on foot), and is one of the most reliant on private car trips (with 88.6% of visitors having arrived by car);
- Hyde Town Centre is the most reliant on private car trips (90.3% of the pedestrian respondents arrived in the centre by car) and, correspondingly, the least reliant on public transport (only 7.7% of respondents came via bus);
- conversely, Droylsden District Centre was the least reliant on private cars (with only 61.0% of the surveyed pedestrians arriving this way) and the most reliant on both public transport (with 19.4% of respondents having arrived by bus, train or Metrolink) and on walking (16.6% of respondents arrived on foot);

- Stalybridge District Centre was the most reliant on bus trips (with 16.0% of respondents arriving by bus), followed by Denton Town Centre (with 14.0% of respondents arriving by bus).

Table 2: Mode of Travel to Town Centre (% of People)

Centre	Car	Bus	Train/ Metro	Taxi	Bicycle	Walk	Other	Total
Ashton-under-Lyne	88.6	9.9	0.3	0.1	0.0	1.0	0.0	100.0
Hyde	90.3	7.7	0.0	0.9	0.1	1.1	0.0	100.0
Denton	79.7	14.0	0.0	0.9	0.0	5.4	0.0	100.0
Droylsden	61.0	10.3	9.1	0.9	2.1	16.6	0.0	100.0
Stalybridge	65.3	16.0	0.2	2.8	0.0	15.7	0.0	100.0

- 2.2 Table 3 records the frequency of visits to each centre for any purpose. Stalybridge District Centre, in particular, had a high frequency of visits, with almost three quarters of respondents visiting at least twice a week, and 18.4% visiting every day. Ashton-under-Lyne Town Centre was among the least frequently visited, with almost a third of respondents reporting that they visited the centre less than once a month.

Table 3: Frequency of Visits to Centre – for any Purpose (% of Trips)

Centre	Every day	4 to 6 times a week	2 to 3 times a week	Once a week	Once a fortnight	Once a month	Less than once a month	First time today	Don't know/ Refused	Total
Ashton-under-Lyne	5.5	10.5	17.5	13.0	8.5	8.5	33.0	2.0	1.5	100.0
Hyde	12.0	13.0	18.0	16.0	15.0	6.0	17.0	3.0	0.0	100.0
Denton	9.7	16.5	16.5	26.2	7.8	5.8	11.7	5.8	0.0	100.0
Droylsden	5.9	16.8	40.6	22.8	5.0	5.0	4.0	0.0	0.0	100.0
Stalybridge	18.4	27.2	29.1	14.6	4.9	2.9	0.0	1.9	1.0	100.0

3 MAIN PURPOSE OF VISIT

- 3.1 Table 4 records the findings in relation to the main purpose of the visit to each of the five centres surveyed, and it shows that:

- Stalybridge District Centre is the most reliant on shoppers buying food and groceries (43.7% of trips were for this purpose), with Denton, Droylsden and Hyde also recording a high proportion of visits for the purpose of food and grocery shopping (41.8%, 41.6% and 38.0% of trips to these centres, respectively, were for this reason);

- Ashton-under-Lyne Town Centre recorded the lowest proportion of trips for food and grocery shopping (only 19.0%), but relatively high proportions of trips to the town centre for financial, legal, personal or other services (21.0%), or to buy non-food goods (19.5%); and that
- Denton Town Centre and Stalybridge District Centre recorded the highest proportion of trips for work/business purposes (14.6% and 13.6% of trips, respectively), while work/business was not among the top five reasons for visiting Droylsden District Centre (actually only 2.0% of trips to Droylsden were for this purpose).

Table 4: Main Purpose of Visit to Centre (% of Trips)

Centre	Top 5 Responses - % of Total Responses in Each Centre				
	1	2	3	4	5
Ashton-under-Lyne	For financial, legal, personal or other services (21.0%)	To buy non-food goods (19.5%)	To buy food and groceries (19.0%)	Window shopping / browsing (18.0%)	For work / business purposes (7.5%)
Hyde	To buy food and groceries (38.0%)	To buy non-food goods (14.0%) or For financial, legal, personal or other services (14.0%)	Window shopping / browsing (13.0%)	For work / business purposes (8.0%)	To meet somebody (7.0%)
Denton	To buy food and groceries (41.8%)	For work / business purposes (14.6%)	For financial, legal, personal or other services (11.7%)	To meet somebody (10.7%)	Window shopping / browsing (7.8%)
Droylsden	To buy food and groceries (41.6%)	To buy non-food goods (20.8%)	For financial, legal, personal or other services (9.9%)	Window shopping / browsing (7.9%)	To use a health service (5.9%)
Stalybridge	To buy food and groceries (43.7%)	For work / business purposes (13.6%)	To buy non-food goods (8.7%) or For financial, legal, personal or other services (8.7%)	To meet somebody (7.8%)	Window shopping / browsing (3.9%)

4 LIKES, DISLIKES AND SUGGESTIONS FOR IMPROVEMENT

- 4.1 The pedestrian survey also canvassed customers' likes, dislikes and suggestions for improvements in each of the centres and the findings are set out in Tables 5 to 9.
- 4.2 In Ashton-under-Lyne Town Centre (Table 5), it is somewhat disappointing that well over half of respondents (57.5%) reported that what they most liked about the centre was 'nothing in particular/no opinion' (34.5%) and 'near to home/convenient' (23.0%).

- 4.3 On the other hand, when asked about dislikes, almost half of respondents (49.5%) said *'nothing in particular/ no opinion'*. The next most common dislike was *'dirty streets/car parks/footpaths'*, although only 11.5% of pedestrians cited this criticism.
- 4.4 When asked how Ashton could best be improved, 40.0% of the surveyed pedestrians answered *'don't know/none mentioned'*. The next most common response was *'better choice/quality of independent shops'*, with a fifth of people (20.0%) giving this answer.

Table 5: Ashton-under-Lyne Town Centre - Likes, Dislikes and Suggestions for Improvement

Aspects most liked in Ashton-under-Lyne Town Centre		
Rank	Factor	Proportion of Trips (%)
1	No opinion / Nothing in particular	34.5
2	Near to home / convenient	23.0
3	Good choice / quality of independent shops	18.5
4	Not too crowded	13.0
5	Good accessibility by bus	11.5
Aspects most disliked in Ashton-under-Lyne Town Centre		
Rank	Factor	Proportion of Trips (%)
1	No opinion / Nothing in particular	49.5
2	Dirty streets / car parks / footpaths	11.5
3	Lack of choice / poor quality of independent shops	11.0
4	Too many charity shops	9.5
5	Dislike the new market	8.0
How could Ashton-under-Lyne Town Centre best be improved?		
Rank	Factor	Proportion of Trips (%)
1	Don't know / None mentioned	40.0
2	Better choice / quality of independent shops	20.0
3	Remove litter / clean streets more often	14.0
4	More non-food multiple stores / high street chains like Next, etc	9.5
5	Improve the market	9.5

- 4.5 Table 6 shows that most frequently cited like for Hyde Town was *'near to home/convenient'* (29.0%). It is also noteworthy that a fifth of respondents (21.0%) stated that Hyde had a *'good choice/quality of independent shops'*.

- 4.6 When the pedestrians were asked what they most disliked about Hyde Town Centre, the most frequently cited answer was *'no opinion/nothing in particular'* (42.0%), but 15.0% of respondents answered *'lack of choice/poor quality of independent shops'*.
- 4.7 Similarly, almost a third of respondents (32.0%) could not name a particular way in which Hyde could best be improved. The next most frequent answer was *'better choice/quality of independent shops'*, which was said by one in five people (20.0%). Similar numbers of people also said *'more non-food multiple stores/high street chains like Next'* (19.0%), *'improve appearance of the buildings and landscaping'* (18.0%) and *'remove litter/clean streets more often'* (18.0%).

Table 6: Hyde Town Centre - Likes, Dislikes and Suggestions for Improvement

Aspects most liked in Hyde Town Centre		
Rank	Factor	Proportion of Trips (%)
1	Near to home / convenient	29.0
2	No opinion / Nothing in particular	27.0
3	Good choice / quality of independent shops	21.0
4	Not too crowded	17.0
5	Parking is easy / car-friendly	14.0
Aspects most disliked in Hyde Town Centre		
Rank	Factor	Proportion of Trips (%)
1	No opinion / Nothing in particular	42.0
2	Lack of choice / poor quality of independent shops	15.0
3	Dirty streets / car parks / footpaths	11.0
4	Dislike the new market	7.0
5	Lack of choice / poor quality of non-food multiple stores / high street chains like Next	6.0
How could Hyde best be improved?		
Rank	Factor	Proportion of Trips (%)
1	Don't know / None mentioned	32.0
2	Better choice / quality of independent shops	20.0
3	More non-food multiple stores / high street chains like Next, etc	19.0
4	Improve appearance of the buildings and landscaping	18.0
5	Remove litter / clean streets more often	18.0

- 4.8 In Denton Town Centre (Table 7), *'Near to home/convenient'* was, again, the most frequently cited like (37.9%). Almost one in five pedestrians (19.4%) said that they liked that Denton was *'not too crowded'*, while 15.5% of them said that Denton *'feels safe'*.
- 4.9 When asked what they most disliked about Denton, 23.3% of pedestrians said *'no opinion/nothing in particular'*, and a further 20.4% said *'don't know'*. Nevertheless, another 20.4% said that there are *'too many empty shops'*.
- 4.10 When asked how Denton could best be improved, the most frequent answer, by far, was *'don't know/none mentioned'* (44.7%). The second most frequent answer was *'better choice/quality of independent shops'*, which was cited by 17.5% of respondents.

Table 7: Denton Town Centre - Likes, Dislikes and Suggestions for Improvement

Aspects most liked in Denton Town Centre		
Rank	Factor	Proportion of Trips (%)
1	Near to home / convenient	37.9
2	Not too crowded	19.4
3	No opinion / Nothing in particular	17.5
4	Feels safe	15.5
5	(Don't know)	12.6
Aspects most disliked in Denton Town Centre		
Rank	Factor	Proportion of Trips (%)
1	No opinion / Nothing in particular	23.3
2	Too many empty shops	20.4
3	(Don't know)	20.4
4	Dirty streets / car parks / footpaths	16.5
5	Lack of choice / poor quality of independent shops	9.7
How could Denton best be improved?		
Rank	Factor	Proportion of Trips (%)
1	Don't know / None mentioned	44.7
2	Better choice / quality of independent shops	17.5
3	Improve appearance of the buildings and landscaping	13.6
4	Remove litter / clean streets more often	13.6
5	More / better eating and drinking facilities	13.6

- 4.11 Table 8 shows that almost half of those surveyed in Droylsden District Centre (49.5%) said that the thing they liked most about the centre was that it is *'near to home/convenient'*.

Other frequently-cited likes included ‘not too crowded’ (32.7%), ‘parking is easy/car friendly’ (29.7%), ‘parking is cheap/free’ (27.7%), and ‘feels safe’ (26.7%).

- 4.12 When asked about their dislikes in relation to Droylsden District Centre, just under half of respondents (49.5%) said that there are ‘too many empty shops’. Other frequently-cited dislikes were ‘lack of choice/poor quality of independent shops’ (38.6%), ‘lack of choice/poor quality of non- food multiple stores/high street chains like Next’ (30.7%), and ‘too many “dead” frontages during the day’ (24.8%).
- 4.13 The most frequently-cited suggestion as to how Droylsden could best be improved was ‘better choice/quality of independent shops’ (45.6%), followed by ‘more non-food multiple stores/high street chains like Next, etc.’ (30.7%), ‘more shelter from wind/rain’ (21.8%), and ‘remove litter/clean streets more often’ (15.8%).

Table 8: Droylsden District Centre - Likes, Dislikes and Suggestions for Improvement

Aspects most liked in Droylsden District Centre		
Rank	Factor	Proportion of Trips (%)
1	Near to home / convenient	49.5
2	Not too crowded	32.7
3	Parking is easy / car-friendly	29.7
4	Parking is cheap / free	27.7
5	Feels safe	26.7
Aspects most disliked in Droylsden District Centre		
Rank	Factor	Proportion of Trips (%)
1	Too many empty shops	49.5
2	Lack of choice / poor quality of independent shops	38.6
3	Lack of choice / poor quality of non-food multiple stores / high street chains like Next	30.7
4	Too many ‘dead’ frontages during the day	24.8
5	Too many charity shops	18.8
How could Droylsden best be improved?		
Rank	Factor	Proportion of Trips (%)
1	Better choice / quality of independent shops	45.6
2	More non-food multiple stores / high street chains like Next, etc	30.7
3	More shelter from wind / rain	21.8
4	Remove litter / clean streets more often	15.8
5	Improve street furniture / floral displays	12.9

- 4.14 Table 9 shows that almost a quarter of respondents (24.3%) liked that Stalybridge District Centre is *'near to home/convenient'*. The next most frequently-cited answer, other than *'no opinion/nothing in particular'* (17.5%) was *'feels safe'* (also 17.5%). More than a tenth of the pedestrians surveyed (11.7%) said that they liked everything about Stalybridge.
- 4.15 When asked about dislikes, the most frequently-cited answer (after *'no opinion/nothing in particular'*), was *'dirty streets/car parks/footpaths'* (17.5%). Over one in ten respondents said that Stalybridge has *'too many empty shops'* (12.6%) and that there is a *'lack of choice/poor quality of independent shops'* (10.7%).
- 4.16 A fifth of pedestrians said that Stalybridge could best be improved through *'better choice/quality of independent shops'*. However, a further 16.5% suggested *'remove litter/clean streets more often'*, with 14.6% calling for *'better choice/quality of shops in general'* and 11.7% calling for *'more non-food multiple stores/high street chains like Next'*.

Table 9: Stalybridge District Centre - Likes, Dislikes and Suggestions for Improvement

Aspects most liked in Stalybridge District Centre		
Rank	Factor	Proportion of Trips (%)
1	Near to home / convenient	24.3
2	Feels safe	17.5
3	No opinion / Nothing in particular	17.5
4	Not too crowded	16.5
5	I like everything about the Town/District Centre	11.7
Aspects most disliked in Stalybridge District Centre		
Rank	Factor	Proportion of Trips (%)
1	No opinion / Nothing in particular	24.3
2	Dirty streets / car parks / footpaths	17.5
3	Too many empty shops	12.6
4	Lack of choice / poor quality of independent shops	10.7
5	I dislike everything about the Town/District Centre	8.7
How could Stalybridge best be improved?		
Rank	Factor	Proportion of Trips (%)
1	Don't know / None mentioned	23.3
2	Better choice / quality of independent shops	20.4
3	Remove litter / clean streets more often	16.5
4	Better choice / quality of shops in general	14.6
5	More non-food multiple stores / high street chains like Next, etc	11.7

5 TYPES OF SHOPS AND LEISURE FACILITIES PERCEIVED TO BE LACKING

5.1 Respondents were asked whether there were any types of **food** shops that each of the centres were lacking in. Table 10 shows that the highest proportion of affirmative responses (indicating dissatisfaction with the food offer) was in Droylsden (42.6%), whereas the lowest proportion of affirmative responses (indicating satisfaction with the food offer) was in Hyde, where only 9.0% of respondents replied in the affirmative.

Table 10: Responses to the Question 'Are there any types of food shops that you feel(NAME OF CENTRE) is lacking in?'

Centre	Yes	No	Don't Know
Ashton-under-Lyne	21.0%	74.0%	5.0%
Hyde	9.0%	85.0%	6.0%
Denton	12.6%	72.8%	14.6%
Droylsden	42.6%	56.4%	1.0%
Stalybridge	26.2%	66.0%	7.8%

5.2 The most frequently-cited responses from those who felt that the centres were lacking in **food** shops were as follows:

- in **Ashton-under-Lyne**, the most frequently-cited responses were '*a large supermarket*' (12 responses), '*Marks & Spencer*' (10 responses) and '*a health food shop*' (7 responses);
- in **Hyde**, there were only 9 respondents who thought that the centre was lacking in any type of food shop, and the only responses attracting 2 mentions were '*Marks & Spencer*' and '*Sainsbury's*';
- in **Denton**, the most frequently-cited answers (each attracting 4 responses) were '*butchers*', '*bakery*' and '*Tesco*';
- in **Droylsden**, the most frequently-cited deficiencies were '*greengrocers*' (23 responses), '*butchers*' (11 responses), '*a large supermarket*' (7 responses), '*delicatessen*' (6 responses) and '*bakery*' (4 responses); and

- in **Stalybridge**, the most frequently-cited deficiencies were 'bakery' (6 responses), 'butchers' (5 responses), 'greengrocers' (5 responses) and Asda (3 responses).

5.3 Respondents were also asked if there were any types of **non-food** shops that the centres were lacking in. Table 11 shows that the highest proportion of affirmative responses (indicating dissatisfaction with the non-food offer) was in Stalybridge (45.6%), whereas the lowest proportion of affirmative responses (indicating satisfaction with the non-food offer) was in Denton, where only 21.4% of respondents replied in the affirmative.

Table 11: Responses to the Question 'Are there any types of non-food shops that you feel(NAME OF CENTRE) is lacking in?'

Centre	Yes	No	Don't Know
Ashton-under-Lyne	33.0%	65.0%	2.0%
Hyde	31.0%	63.0%	6.0%
Denton	21.4%	63.1%	15.5%
Droylsden	38.6%	60.4%	1.0%
Stalybridge	45.6%	50.5%	3.9%

5.4 The most frequently-cited responses from those who felt that the centres were lacking in **non-food** shops were as follows:

- in **Ashton**, the most frequently-cited responses were 'clothes shops' (17 responses), 'Marks & Spencer' (17 responses), 'Debenhams' (11 responses), 'Primark' (8 responses), 'department store' (5 responses) and 'independent shops' (4 responses);
- in **Hyde**, the most frequently-cited responses were 'clothes shops' (9 responses), 'Primark' (6 responses), 'Wilko' (5 responses), 'Marks & Spencer' (4 responses), 'Next' (4 responses) and 'shoe shop' (3 responses);
- in **Denton**, the most frequently-cited responses were 'Primark' (10 responses), 'shoe shop' (3 responses), 'Marks & Spencer' (2 responses), 'clothes shops' (2 responses), 'independent shops' (2 responses), 'Next' (2 responses) and 'toy shop' (2 responses);
- in **Droylsden**, by far the most frequently-cited deficiency is in 'clothes shops' (22 responses), followed by 'shoe shops' (5 responses), 'Primark' (4 responses) and 'DIY shop' (3 responses); and

- likewise, in **Stalybridge**, by far the most frequently-cited deficiency is in ‘*clothes shops*’ (31 responses), followed by ‘*shoe shop*’ (11 responses), ‘*Primark*’ (4 responses), ‘*DIY shop*’ (3 responses) and ‘*independent shops*’ (3 responses).

5.5 The survey then asked whether there were any **other town centre type facilities** lacking in each of the five centres. Table 12 shows that the proportion of ‘yes’ responses ranged from 16.0%, in Hyde Town Centre, to 23.3%, in Stalybridge District Centre.

Table 12: Responses to the Question: Other than retail, are there any other town centre type facilities that you feel(NAME OF CENTRE) is lacking in?

Centre	Yes	No	Don't Know
Ashton-under-Lyne	18.5%	77.5%	4.0%
Hyde	16.0%	72.0%	12.0%
Denton	16.5%	62.1%	21.4%
Droylsden	18.8%	80.2%	1.0%
Stalybridge	23.3%	70.9%	5.8%

5.6 Of the respondents who answered in the affirmative to **other missing town centre type facilities**, the most desired facility was ‘*public toilets*’ in Droylsden (68.4%), Stalybridge (45.8%) and Denton (41.1%), and this answer made the top five in all of the surveyed centres. In Ashton, 27.0% of the respondents citing other missing town centre type facilities mentioned the need for a ‘*teashop/café*’, with a further 10.8% calling for ‘*more leisure facilities*’. In all five centres at least 10% of those identifying missing facilities were calling for ‘*more children’s activities*’.

6 SATISFACTION RATINGS

6.1 Up until this point, the questions asked of pedestrians had generally been in an open ended manner. However, the survey then asks a series of questions in relation to respondents’ satisfaction ratings with respect to a variety of factors relating to: the food, leisure and service offer in each centre; various environmental and personal safety considerations; and in relation to various transport and accessibility considerations for all modes. For each factor, respondents were asked to give a score from 1 to 5, with ‘*very satisfied*’ responses scoring 5; ‘*satisfied*’ responses scoring 4; ‘*neutral*’ responses scoring 3; ‘*dissatisfied*’ responses scoring 2; and ‘*very dissatisfied*’ responses scoring 1. ‘*No*

opinion' and *'don't know'* responses were excluded. This methodology therefore enabled us to calculate a mean score for each factor, so that the higher the mean score, the higher the level of satisfaction.

6.2 The five factors considered in relation to each centre's **retail, leisure and service offer** were:

- range and quality of shops;
- supermarket offer;
- family entertainment facilities, e.g. cinema, bowling, bingo and so on;
- food and drink offer; and
- range of financial, legal and personal services (e.g. banks, solicitors, hairdressers, beauty parlours and so on).

6.3 Thus, the mean scores and centre rankings for these five retail, leisure and service offer factors are set out in Table 13, which shows that:

- Denton achieves the highest satisfaction ratings in relation to its **overall range and quality of shops** (with a mean score of 3.82), while Droylsden is ranked the lowest of the five centres for this category (2.92), and Stalybridge, Hyde and Ashton-under-Lyne all achieve similar scores (ranging from 3.22 to 3.25);
- in terms of **supermarket offer**, Hyde achieved the highest mean score (4.04), reflecting the earlier finding that only 9.0% of respondents perceived the centre to be lacking in food shops, and Ashton received the lowest score of 3.15 – perhaps as a reflection of the fact that Sainsbury's Asda and Marks & Spencer are all in out-of-centre locations for the purposes of the definition in the NPPF;
- Denton, again, received the highest marks in terms of both **family entertainment facilities** (3.59) and **food & drink offer** (3.70), while Droylsden was ranked lowest for both (1.94 and 3.51, respectively); and that

- Droylsden was also marked the lowest by pedestrians in terms of its **range of financial, legal and personal services**, where it was given a score of 2.44, which was significantly lower than the highest score, achieved by Hyde, of 4.04.

Table 13: Pedestrian Satisfaction Ratings in relation to the Centres' Retail/Leisure/Services Offer

Retail/Leisure/Service Offer										
	Range & quality of shops		Supermarket offer		Family entertainment facilities		Food & drink offer		Range of financial, legal & personal services	
	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank
Ashton-under-Lyne	3.22	4	3.15	5	3.30	2	3.65	3	3.80	2
Hyde	3.23	3	4.04	1	3.06	3	3.67	2	4.04	1
Denton	3.82	1	3.71	3	3.59	1	3.70	1	3.60	4
Droylsden	2.92	5	3.22	4	1.94	5	3.51	5	2.44	5
Stalybridge	3.25	2	3.86	2	2.71	4	3.64	4	3.66	3

6.4 The five factors considered in relation to each centre's **environmental quality and personal safety factors** were:

- cleanliness of shopping streets;
- personal safety/policing;
- quality and overall appearance of buildings and landscaping;
- shelter from weather; and
- pedestrian safety (which we consider is best treated as a personal safety issue, rather than as a transport/accessibility factor).

6.5 Thus, the mean scores and centre rankings for these five environmental quality and personal safety factors are set out in Table 14, which shows that:

- in terms of both **cleanliness of shopping streets** and **personal safety/policing**, Droylsden ranked the highest (with 3.63 and 4.00, respectively) and Stalybridge ranked the lowest (with 2.75 and 3.54, respectively), with the other three centres all achieving similar scores somewhere in the middle;
- Droylsden was, however, ranked the lowest in terms of **quality and overall appearance of buildings and landscaping**, with a score of 2.84, compared to the highest score, achieved by Denton, of 3.38;

- Stalybridge was, again, ranked the lowest in terms of **shelter from weather**, for which it received a mean score of 2.66, and Ashton-under-Lyne was ranked the highest, with a mean score of 3.43; and that
- none of the centres scored less than 3.77 (which was the score achieved by Denton) for **pedestrian safety**, and the highest ranked centre was Hyde, with a score of 4.08.

Table 14: Pedestrian Satisfaction Ratings in relation to the Centres' Environmental and Personal Safety Factors

Environmental and Personal Safety Factors										
	Cleanliness of shopping streets		Personal safety / policing		Quality & overall appearance of buildings & landscaping		Shelter from weather		Pedestrian safety	
	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank
Ashton-under-Lyne	3.41	4	3.57	4	3.18	2	3.43	1	3.92	3
Hyde	3.42	3	3.86	2	3.16	3	3.26	3	4.08	1
Denton	3.47	2	3.68	3	3.38	1	3.33	2	3.77	5
Droylsden	3.63	1	4.00	1	2.84	5	2.69	4	3.96	2
Stalybridge	2.75	5	3.54	5	2.91	4	2.66	5	3.82	4

6.6 The six factors considered in relation to each centre's **accessibility by various modes of transport** were:

- amount of car parking;
- cost of car parking;
- accessibility by bus;
- cycle access/cycle parking;
- ease of movement around the centre on foot; and
- access for people with mobility/hearing/site difficulties.

6.7 Thus, the mean scores and centre rankings for these six accessibility factors are set out in Table 15, which shows that:

- Droylsden is by far the most highly rated centre in terms of accessibility, achieving the highest mean score in each of the six factors, although none of the centres had a mean score of less than 3.30 in any relation to any of the six factors;

- Ashton-under-Lyne received the lowest score in the **amount of car parking** category (3.55) and also in terms of **access for people with mobility/hearing/sight difficulties**;
- Hyde was ranked the lowest in respect of the **cost of car parking**, with a mean score of 3.30; and that
- Denton was received the lowest mean score for the categories of **accessibility by bus** (3.86) and **cycle access/cycle parking** (3.58).

Table 15: Pedestrian Satisfaction Ratings in relation to the Centres' Accessibility Factors

	Accessibility Factors											
	Amount of car parking		Cost of car parking		Accessibility by bus		Cycle access / cycle parking		Ease of movement around the centre on foot		Access for people with mobility / hearing / sight difficulties	
	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank	Mean Score	Rank
Ashton-under-Lyne	3.55	5	3.31	4	4.05	3	3.78	4	4.13	4	3.65	5
Hyde	3.57	4	3.30	5	4.36	2	3.83	2	4.31	2	4.09	2
Denton	3.90	2	3.73	2	3.86	5	3.58	5	4.18	3	3.69	4
Droylsden	4.25	1	4.13	1	4.44	1	4.43	1	4.32	1	4.15	1
Stalybridge	3.57	3	3.40	3	4.02	4	3.82	3	4.06	5	3.90	3

6.8 Table 16 presents an analysis of the mean of means for the five retail, leisure and service offer factors; for the five environmental and personal safety factors; and for the six accessibility factors. Table 16 shows that:

- Denton achieved the highest mean of means score in respect of the factors relating to the **retail/leisure/service offer**, which was 3.68, while Droylsden was ranked lowest in this category and received a score of 2.81;
- pedestrians ranked Hyde the highest in terms of the factors affecting **environmental and personal safety**, where its mean of means score was 3.56, although this was only slightly higher than the lowest mean of means score of 3.14, which was achieved by Stalybridge; and that
- unsurprisingly, given that it was ranked first for all six factors, Droylsden scored the highest in terms of **accessibility**, with a mean of means score of 4.29, while Ashton-under-Lyne had the lowest mean of means score for accessibility of 3.75.

Table 16: Mean of Means for Pedestrian Satisfaction Ratings

	Retail/ Leisure/ Service Offer		Environmental and Personal Safety		Accessibility	
	Mean of Means	Overall Rank	Mean of Means	Overall Rank	Mean of Means	Overall Rank
Ashton-under-Lyne	3.42	4	3.50	3	3.75	5
Hyde	3.61	2	3.56	1	3.91	2
Denton	3.68	1	3.53	2	3.82	3
Droylsden	2.81	5	3.42	4	4.29	1
Stalybridge	3.42	3	3.14	5	3.80	4

6.9 Finally, Table 17 sets out the overall mean of means for the sixteen factors considered. Table 17 shows that the range of mean of means scores is fairly small, with only 0.24 between the highest and lowest scores. Nonetheless, Table 17 shows that Hyde Town Centre achieves the highest mean of means score when all sixteen factors are taken to account, of 3.71, and that Stalybridge receives the lowest mean of means score, of 3.47.

Table 17: Mean of Means for all Sixteen Customer Satisfaction Factors

Overall		
	Mean of Means	Overall Rank
Ashton-under-Lyne	3.57	3
Hyde	3.71	1
Denton	3.69	2
Droylsden	3.55	4
Stalybridge	3.47	5

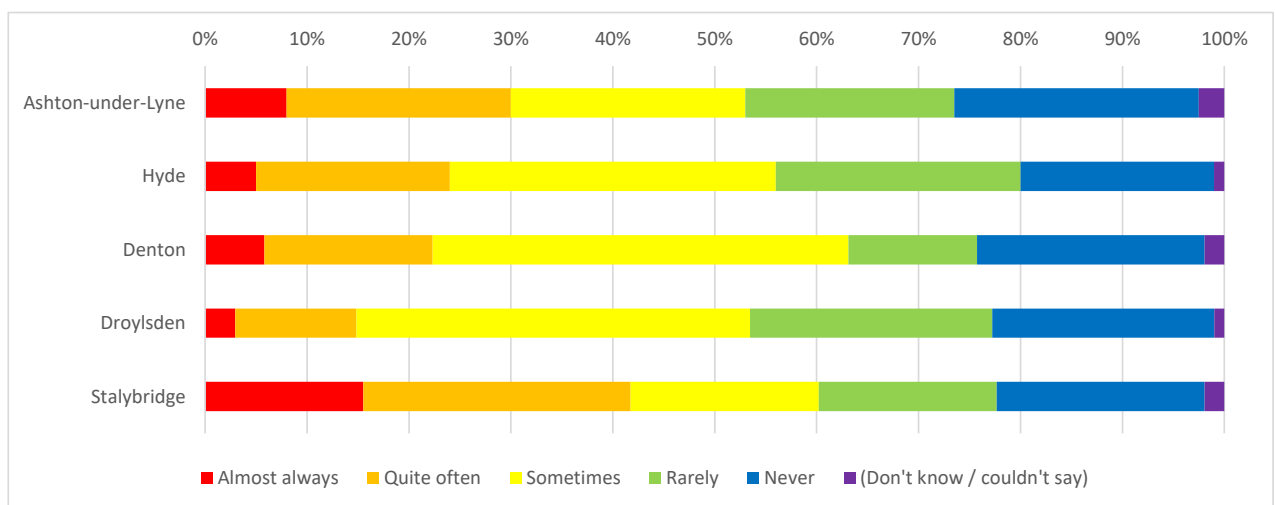
7 LINKED TRIPS

7.1 The pedestrian survey also asked how often respondents combine shopping with visits to services, or with visits to eating and drinking outlets, or with visits to other leisure facilities. The findings are set out in Table 18, which shows that:

- the propensity for linked trips combining shopping with visits to services/eating and drinking outlets/leisure facilities is greatest in Stalybridge (where 41.7% of respondents answered that they combined their visits to the centre with visits to services 'almost always', or 'quite often'), followed by Ashton-under-Lyne (30.0%);

- Droylsden appears to be the centre with the lowest propensity for linked trips, with 45.5% of its pedestrians reporting that they undertake linked trips ‘rarely’ or ‘never’; and that
- in each of the five centres, the proportion of respondents reporting that they ‘never’ undertook linked trips during their visits was in the range 19.0% (Hyde) to 24.0% (Ashton-under-Lyne), so there is clearly room for improvement in the promotion of linked trips.

Table 18: Linked Trips Combining Shopping with Visits to Services/Eating and Drinking Outlets/Leisure Facilities



8 HEALTH AND DISABILITY

8.1 Finally, the pedestrian survey asked various questions in relation to health or disability. In response to the question: ‘Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months (including problems related to old age)?’, 86.0% of respondents said ‘No’, with 7.74% per cent saying ‘Yes, limited a little’, and 5.77% saying ‘Yes, limited a lot’. The majority of the respondents who did report a health/disability problem said that this was related to mobility (69.51%).

8.2 When asked to describe what problems they experienced, most of those who had cited a health/disability problem said ‘don’t know/none mentioned’, but the next most frequent responses were those that related to their inability to walk very well. For example,

21.95% said that they *'can't walk far'*, and 14.63% said that *'I have to stop and rest often'*. When these respondents were asked what improvements they would like to see that would help overcome their difficulties, the most frequently cited responses (excluding the answer *'don't know/none mentioned'*) were: *'more street/shop seating/seating in general'* (20.0%), *'better maintenance of pavements'* (15.0%), *'more circulation space in shops'* (10.0%), *'reduce amount of pavement clutter such as A-boards or other obstructions'* (7.5%) and *'more disabled parking'* (also 7.5%).

9 CONCLUSIONS

Ashton-under-Lyne

- 9.1 Ashton-under-Lyne achieves an overall mean of means satisfaction rating of 3.57, placing it third out of the five centres and suggesting that it is a reasonably healthy Town Centre. Indeed, Ashton scored relatively highly on a number of factors, including *'range of financial, legal & professional services'*, *'family entertainment facilities'*, *'shelter from weather'* and *'quality and overall appearance of buildings and landscaping'*. Conversely, Ashton was the lowest ranking of the five centres in relation to the accessibility factors, particularly in relation to *'access for people with mobility/hearing/sight difficulties'* and in relation to the *'amount of car parking'*.
- 9.2 Furthermore, the pedestrians surveyed in Ashton appeared to perceive some lack of satisfaction in relation to the Town Centre's convenience goods offer. Indeed, the centre had the lowest proportion of trips for the purpose of food/grocery shopping, and the most desired type of food shop was *'a large supermarket'*, which would seem to be a reflection, in part, of the fact that the Sainsbury's, M&S and Asda foodstores are in out-of-centre locations for the purposes of the NPPF. Indeed, pedestrians rated Ashton-under-Lyne the lowest of the five centres in terms of *'supermarket offer'*.
- 9.3 A third of the pedestrians surveyed in Ashton-under-Lyne also perceived a deficiency in comparison provision, particularly clothes shops and almost one in four of the respondents in Ashton-under-Lyne (24.0%) stated that they never undertook linked trips.

Hyde

- 9.4 Hyde Town Centre achieved the highest satisfaction rating in relation to a number of the factors identified in the pedestrian survey (including *'supermarket offer'*, *'range of financial and professional services'* and *'pedestrian safety'*) and received the highest overall mean of means score of all five centres, of 3.71.
- 9.5 The pedestrian survey also indicated that Hyde Town Centre had the highest level of satisfaction with its food offer, with only 9 out of 100 of respondents saying that they felt Hyde was lacking in foodstores. This is reflected in the finding that a high proportion of visits to Hyde were for the purpose of food/grocery shopping (38.0%).
- 9.6 In terms of Hyde's non-food offer, the proportion of dissatisfied respondents was higher, at 31.0%, with most of these people desiring more clothes shops, in general, or a Primark store, specifically.
- 9.7 The general satisfaction with Hyde's offer of town centre facilities, relative to the other centres in Tameside, might explain why Hyde had the lowest proportion of respondents who stated that they *'never'* undertook linked trips (19.0%). Hyde also scored highest of all the centres in terms of *'environmental and personal safety'* (receiving a mean of means score of 3.56).

Denton

- 9.8 Denton achieved the highest mean of means score of all the five centres in respect of the factors relating to the retail/leisure/service offer, which include *'overall range and quality of shops'*. Indeed, only 12.6% of the pedestrians surveyed in Denton felt that there was something missing in its food offer, and a high proportion of the trips made to Denton were for the purpose of food/grocery shopping (41.8%). Similarly, Denton recorded the lowest proportion of respondents that were felt that there was something missing in its non-food offer (21.4%), reflecting the presence of Crown Point Shopping Centre. Moreover, Denton was also rated the highest by pedestrians in terms of *'family entertainment facilities'* (3.59) and *'food & drink offer'* (3.70).

Droylsden

- 9.9 Droylsden District Centre appears to be struggling in a number of key areas highlighted by the pedestrian survey. In particular, Droylsden received the lowest mean of means score of all five centres in respect of the factors relating to its *'retail/leisure/service offer'* (with a mean score of 2.81). Moreover, when asked what they most disliked about Droylsden, almost half of the respondents (49.5%) answered that it had *'too many empty shops'*.
- 9.10 Pedestrians in Droylsden expressed particular dissatisfaction with its convenience offer, with 42.6% of them answering that they felt the centre was lacking in food shops (the highest proportion by a fairly wide margin). There was especially strong demand in the centre for a *'greengrocers'* and *'butchers'*. In addition, almost two fifths of respondents perceived that the centre was lacking in terms of its non-food shop offer, with well over half of these expressing a desire for more clothing shops.
- 9.11 In terms of its offer of town centre facilities, Droylsden was ranked the lowest by pedestrians in terms of *'family entertainment facilities'* (with a mean score of 1.94), *'food & drink offer'* (3.51) and *'range of financial, legal and professional services'* (2.44). Pedestrians also ranked Droylsden lowest in terms of the *'quality and overall appearance of buildings and landscaping'* (with a mean score of 2.84). These factors might partially explain the finding that Droylsden had the lowest propensity for linked trips out of all five centres, with 45.5% of its pedestrians reporting that *'rarely'* or *'never'* combined their shopping trips to Droylsden with visits to other services/facilities.

Stalybridge

- 9.12 Stalybridge District Centre received the lowest overall mean of means score of all five centres, of 3.47, although this was only slightly lower than the highest mean of means score, which was 3.71 (achieved by Hyde Town Centre). Stalybridge was ranked particularly low in terms of *'environmental and personal safety'* factors – including *'cleanliness of shopping streets'* (2.75), *'personal safety/policing'* (3.54) and *'shelter from weather'* (2.66) – and ultimately achieved the lowest mean of means satisfaction score in this category.

- 9.13 Slightly over a quarter of the pedestrians surveyed in Stalybridge perceived the centre's convenience offer to be lacking (the second highest proportion among the five centres), with the most popular desired types of food shop being a *'bakery'*, *'greengrocer'* and *'butchers'*. Nonetheless, Stalybridge recorded the highest proportion of visits to the centre for the purpose of food/grocery shopping (43.7%).
- 9.14 Furthermore, 45.6% of respondents in Stalybridge reported that they found the centre's non-food offer to be lacking, which was the highest proportion recorded among the five surveyed centres. Among these respondents, there was particularly high demand for clothes shops, with 66.0% stating that they would like to see this type of non-food store in the centre. Many of the most popular answers to the question *'How could Stalybridge best be improved?'* related to a perceived lack of consumer choice in the centre, with three of the top five answers being *'better choice/quality of independent shops'* (said by 20.4% of pedestrians), *'better choice/quality of shops in general'* (14.6%) and *'more non-food multiple stores/high street chains like Next, etc.'* (11.7%).
- 9.15 Nevertheless, Stalybridge enjoys the highest frequency of visits, with 74.7% of the pedestrians surveyed in the centre reporting that they visited at least twice per week, and 18.4% visiting every day. Stalybridge also had the greatest propensity for linked trips, with 41.7% of respondents stating that they undertook trips that combined shopping with visits to services/eating and drinking outlets/leisure facilities *'almost always'* or *'quite often'*.



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