

QConsult Report

November 2018

Introduction

The aim of this investigation was to analyse the best way to utilise the car park owned by the Local Authority on Roman Road. The car park is predominately used by the taxi service adjacent to it, with many businesses saying that the car park is too expensive at £3.40 per hour. To implement any changes or to leave the car park as it is, it was important to collect data representative of the community of shoppers and businesses.

Research Summary

This study has been pioneered by Roman Road Trust and we are external consultants analysing the current situation. Roman Road Trust is a community and economic development charity and the purpose of this charity is to help improve the high street and give the communities opportunities and spaces to flourish. Roman Road Trust is leading the 'Community Improvement District' model to regenerate the high-street. This initiative emphasises that a high-street is more than just shops and revitalisation of the high street can only be sustained with the involvement of the wider community. Therefore, it was imperative to our research to record the views of businesses and shoppers. The shoppers surveys had been completed by the previous QConsult team, therefore we only needed to collect surveys from the businesses on Roman Road.

Roman Road Trust has considered a variety of changes, which include changing the car park into a green-space or cycling storage to promote walking and cycling in the area. On the other hand, a community-space for market events which would create a more inclusive and friendly community for businesses, shoppers and residents alike. Or a cheaper car park for businesses that believe a car park is vital for their shoppers. We wanted to find a positive solution for the community, so we conducted surveys to draw valid and useful conclusions.

Activity Summary

Over a period of two weeks we, the QConsult team, carried out 79 surveys for a range of businesses on Roman Road. The survey included questions on the type of business, the mode of transport used to access the business, rating Roman Road visitor experience, suggestions on what would encourage more people to visit Roman Road and background information. In pairs of two, we walked into at least 79 businesses on Roman Road and had in depth conversations to better understand the pressing challenges on Roman Road whilst collecting survey responses.

After reading about the Mini Holland programme, we as consultants, Roman Road Trust and representatives from Bethnal Green council embarked on a walking-tour of Waltham Forest, led by Waltham Forest representatives. Waltham Forest Council was given 30 million pounds to increase pedestrianised areas and improve public spaces. A representative from the council alongside the architect who implemented the changes, showed and explained the changes to us. We saw many examples of green spaces and road closures to reduce traffic. We believe that Roman Road Trust can use these ideas to improve Roman Road.

Results

Comparing responses from businesses against responses from visitors (shoppers):

The following analysis is done from the information gathered from the 153 business surveys conducted by the two QConsult teams.

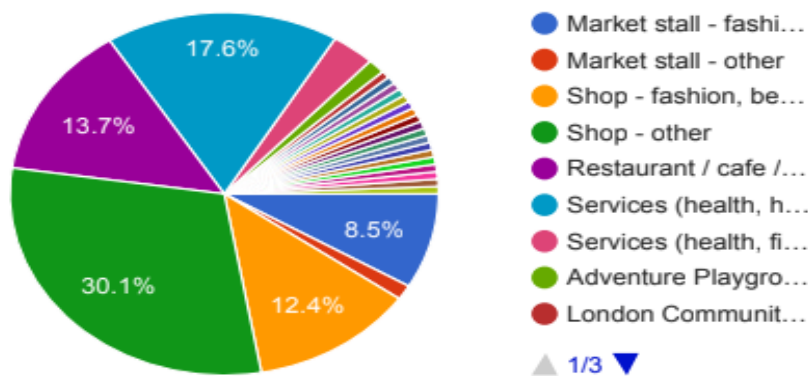


Figure 1. Pie chart of the different shops on Roman Road.

From the surveys we found out that 30.1% of the business that operate around the area of Roman Road are a mixture of different businesses such as Wine shops, tattoos shops and different grocery shops, so about 45 come under this category.

The second largest type of shop operating in the area is services related to health, finance and education which make 17.6% of the total surveyed business which is about 30 businesses.

A good number of businesses in the area are a combination of restaurants, cafes and bars with 13.7% of the surveyed business and another 12.4% are fashion, beauty and accessories shops.

Finally, we have a small 8.5% of market stall businesses and the remaining 17.7% is mixture of specific different businesses which were not categorized in the surveys.

From the data we can infer that the area is predominantly made of a mixture of different businesses rather than one or two specific types.

Comparing Data between Businesses and Visitors:

Really Interesting information can be obtained by comparing data between visitors and business when asked about the method of transportation used by customers.

But first if we analyse the data from the businesses we get the following. Almost half of the businesses believed that their customers are local, living around the area of Roman Road, with

47.7% of business believing this. Whereas 41.8% business said that their customers live still locally but are more from the area of East London, including areas like Tower hamlets, Newham and Hackney.

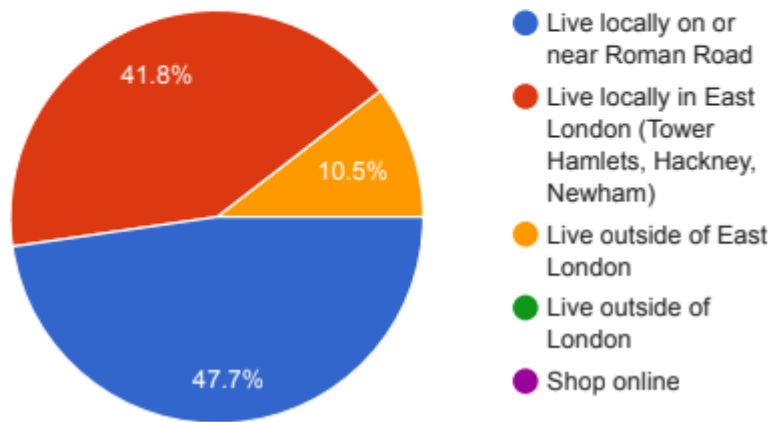


Figure 2. Pie Chart showing the area which businesses believe their customers live in.

A relatively small percentage of business, 10.5%, believed that customers are from outside of London. We believe that they can be occasional customers who come for very specific type of shopping such as wine or furniture.

From the previous data we would anticipate that businesses are going to say that the most popular form of transportation would be walking/cycling or using public transport.

Indeed, when asked the previous question about 41.2% believed customers came by cycling or walking and 24.2% by bus or tube.

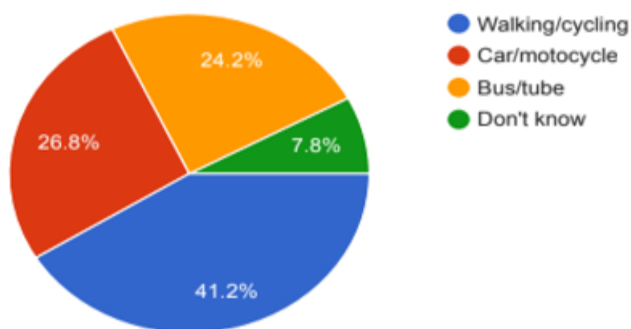


Figure 3. Pie chart showing the mode of transport that businesses believe to be the most popular for customers.

We also had a 26.8% believing the customers used cars or motorcycle to come to their business and the rest 7.8% were not sure.

Then when asked the question what is the SECOND most popular form of transportation 37.9% businesses said it was public transportation (bus/tube) and about 26% said both car/motorcycle and cycling/walking.

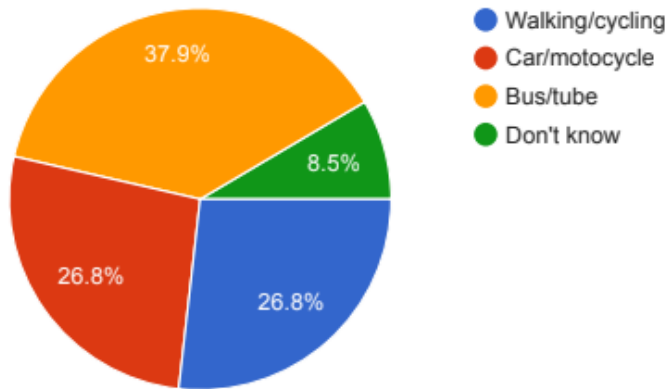


Figure 4. Pie Chart showing the second most popular mode of transport.

Now moving to the part of the surveys regarding customers we learn the following:

From 288 visitor surveys 245 of them said that they either walk (228 of them) or they cycle (17 of them) to Roman Road. The combination of the two makes about 85% using these two methods of transportation which is more than double what businesses actually believed it was.

Furthermore, the number of visitors using public transportation (bus/tube) was 24, which is only 8.3% and 19 of them used cars to come to Roman Road making it only about 6.6% of the total visitor surveys.

From the analysis we can see that business overestimate the use of public transportation or vehicles as a mean of transportation for their customers, sometimes the overestimate can be triple than the actual value.

This can be a very important piece of data that can suggest that cheaper parking is not the main factor that can encourage more people to visit Roman Road. If only 6.6% of the shoppers come to Roman Road by using cars/motorcycles and 85% walks/cycles, then it would be considered inefficient to keep the unused car park for a fraction of total customers that use vehicles and ignore the majority. Statistically, it would be more beneficial to transform the car park into a space event to improve the local community and attract more people to come in Roman Road. We should emphasize that the last statement does not reflect the point of view of business, what they think would attract more people to visit Roman Road, but what we believe would be beneficial according to the data provided from the method of transportation and where customers live.

Visitor experience rating by business

The following section will be focused on the rating given by businesses in terms of visitor experience and comparing their point of view with the shoppers when we found some type of correlation.

By comparing data from both Qconsult teams regarding visitor experience on both visitors and business in the area we can see that they have very similar “correlation”, both groups rate the different questions about the experience in Roman Road similarly.

Analysing the business surveys, we can see that majority of businesses agreed on having “fair” level of work solutions available in the area such as meeting rooms, work cafes or desk space with 61 businesses agreeing on this. But it is important to mention that we personally found that there is only one place available in the area which categorises as a good “work café” or meeting space, which is the Idea Store. Furthermore, another interesting fact from the ratings from the businesses is that 63 businesses out of 153 (41%) said having “good” level of community spirit which is similar compared to the rating surveys done to visitor, where 177 out of 305 (58%) shoppers also rated the category as “good”. However, [What we found out by talking to Roman Bagel Shop] few business owners believed the opposite, they believed there is a “barrier” which prevents having a good community spirit, this “barrier” emerges from the lack of interaction between different cultures, making the place less friendly.

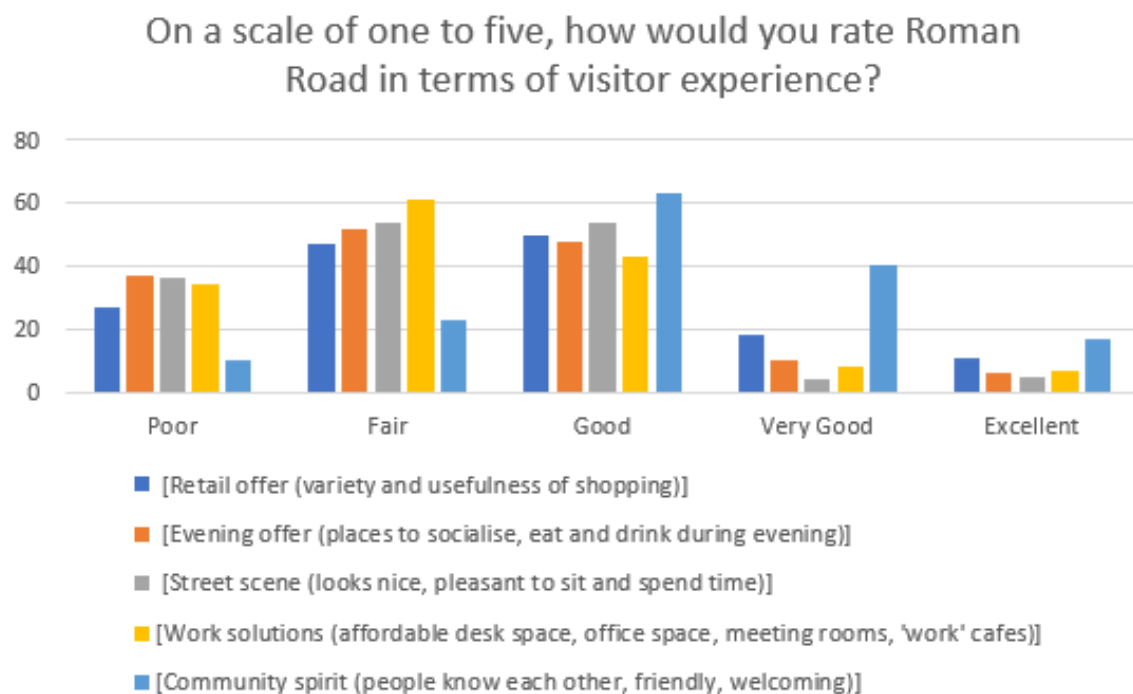


Figure 5. Bar graph showing business rating of visitor experience on Roman Road.

Now focusing more on the end parts of the ratings very few businesses had “excellent” reviews on any of the ratings of the questions. All the different categories had less than 20 businesses rating the highest option, almost identical to what have visitors said in the previous report. Finally, the two categories scoring the highest number of “poor” rating are Evening offer and Street scene. Both had 37 and 36 business rating them very low.

In conclusion, we can see that although businesses and visitors are agreeing that on average the visitor experience is ranked “good” or “fair” there are more people giving the “poor” than the “excellent” in almost all the five categories. This can suggest that the car park can be transformed for the purpose of improving the visitor experience, improve the community and attract more people to visit Roman Road.

Deeper Insights:

Is there a correlation between economic spend, frequency and travel?

The aim of this section is to find an interesting correlation with information regarding visitor's activity on Roman Road. We are specifically looking for a correlation between economic expenditure, frequency of visit and distance travelled. This will enable us to make an argument and draw a conclusion on the use of the car park.

Out of the 288 people surveyed 47 people said they visit daily, 81 people said they visited every 2-3 days, 12 people were recorded to visit every 2-3 months, 42 recorded as visiting every 4-6 days, 49 visit weekly, 19 fortnightly, for 11 it was their first visit, 20 visit monthly, 7 people do not usually visit Roman Road.

From this, 228 people walked, 6 people took the Tube/DLR, 19 took the car, 18 took the bus, 17 took bicycle. 30 people of those that walked spent over £50 with 7 of them spending over £100. There are 8 people accounted for in the survey that spent over £100 on Roman Road, 7 of which walked with the last person using the bus.

Of the 19 people that took their car to visit Roman Road, only 1 person visited daily, whereas the highest proportion of people i.e. 6 visited monthly. The car users that visit Roman Road and have a weekly spend between £10-£19.99 account for 7 people, then 6 people spend between £30-49.99. This is the most money spent weekly within this category.

Comparing the economic spend of car users to that of walkers, we see that the visitors that walk to Roman Road spend more weekly. Whereas, the car users have a weekly expenditure that is similar to cyclists. The car users predominantly live locally with postcodes in the E1, E2 and E3 area. However, there are 5 people with postcodes outside this range.

All in all, a conclusion can be drawn that customers using their cars to travel to Roman Road does not result in a higher economic expenditure. As we can see from the data, that majority of people with high expenditure walk to Roman Road. Since most people walk, it would be better to use the car park for a community space that can be enjoyed by locals whilst visiting Roman Road.

Conclusions and Suggestions

Many conclusions can be drawn from the responses of the survey that we collected, and also from the responses from last year's QConsult team and the comparisons that have been made between business and visitors surveys.

Firstly, survey results suggested that the majority of businesses, 69.3%, thought that it would be beneficial for easier and cheaper car parking to be implemented on Roman Road to attract more people. However, there are many other reasons and results to dispute this opinion and to back up other course of actions for the underused car park on Roman Road. Almost half of businesses surveyed, 47.7%, thought that their customers lived locally on, or near to Roman Road. A further 41.8% thought customers lived locally in east London. These two statistics contradict what was previously said before – why would customers need easier and cheaper parking if most of them lived

either on or around Roman Road, or locally in east London, and therefore within walking distance? Furthermore, only 26.8% said that the most favourite form of transport used by their customers was car or motorcycle, again this shows that it would perhaps be more beneficial if the car park was transformed into a space with greater benefit to Roman Road.

On the subject of transport, our survey showed 41.2% of businesses believe walking or cycling to be the most popular form of transport, and 26.8% think that it is the second most popular form of transport. This suggests that it may be a good idea to implement a transport infrastructure that is most beneficial for pedestrians and cyclists. Not only does this create a more friendly and safer environment for customers and visitors of Roman Road, but it also improves the way that the street would look which is an important part of visitor experience. Such projects like this have been successfully implemented in areas like Walthamstow with Walthamstow village, which has created a small high street with shops and restaurants that people come into use from outside areas.

When asked about visitor experience, very few businesses rate the street scene as excellent or as very good. This suggests that on the whole they do not think that Roman Road looks nice or is pleasant to sit and spend time in. Therefore, transforming the car park into a green space or a nice-looking area for residents and visitors of Roman Road to sit and enjoy would be a considerable opportunity to improve the street scene. Furthermore, it would also go some way towards attracting more people into Roman Road who wouldn't otherwise think to visit, which would provide a healthy boost for local businesses.

Finally, we believe a very achievable, beneficial option for the car park that sits in the middle of Roman Road would be to turn it into a space of land that can be used for the community and for events to take place. This would help to provide a form of evening/daytime entertainment during the year which around 24% of businesses rated Roman Road poorly for. This in turn would vastly benefit Roman Road by turning it into a destination people would be travelling to, to visit, helping the businesses along the road to thrive. Furthermore, we received a comment regarding a "barrier" between different areas and cultures within the community which can stop Roman Road from feeling as friendly as it potentially could be, and which also prohibits community spirit from being excellent. An event space would be an opportunity to bring members of the community together and to help break down the barriers that some members of the community feel.