**Town Centre Opportunities Survey – Additional Analysis**

**Breakdown of findings from respondents who considered themselves to have a disability (25 out of 187 respondents)**

1. Twickenham was the most visited centre (40% of people, compared to 26% overall), followed by Hampton Hill (12%). Richmond was mentioned by only 8%, significantly less than in the overall survey, where it was the centre visited most often (28%).
2. Frequency of visit to their most visited centre: similar results to the overall survey, although there is a smaller proportion of people that visit 2-3 times a week (40% compared to 53% among those who say they do not have a disability) and a higher proportion of people visiting once a month (12% compared to 4%).
3. Reasons for visiting that centre: similar results to the overall survey with a few exceptions: a much smaller percentage of people visited a town centre ‘to browse’ (8% compared to 24%) and for a ‘night out’ (also 8%, compared to 14%), while a larger percentage visited for community events (28% compared to 19%). AgeUK membership was mentioned as a reason for visit by 8% in additional comments.
4. What’s most important in the town centre: ‘Attractiveness’ was nowhere near as important (21%) as in the overall survey (43%), street markets were not mentioned at all (10% in the overall results) and retails options were seen as important by 46% compared to 64% in the overall results. Otherwise the spread of responses was comparable, with good transport links, retail option and feeling safe topping the list, as in the overall survey. Disabled parking was mentioned as an important factor by 12% in additional comments.
5. The results were different compared to the overall survey: as with the main results it was agreed that a ‘better variety of shops’ (54%) was required; however, this group thought parking was an even more important area for improvement, with 62% indicating that. There were significantly higher percentages of people that would like to see street furniture (37%), pavements (33%) and feeling of safety (29 %) improvements, while shop frontage appearance was not mentioned at all, unlike in the overall results (23% there).
6. Transport links received very similar overall rating for positive opinion (satisfactory or above): 88-89%. It is worth noting, however, that only 12% of this group thought they were excellent, compared 32% in the overall results.
7. Perceptions of safety paint a similar picture with 0% of respondents saying it was excellent compared to 12% in the overall survey; however, the total ‘positive’ rating (i.e. satisfactory or above) was almost the same at just above 90%.
8. Slightly lower satisfaction for ‘culture and leisure options’ with 29% having a negative view (rating as poor or very poor) compared to 25% in the overall survey.
9. Lower satisfaction for ‘community feel’ with 25% of respondents saying it was poor or very poor compared to 18% in the overall survey.
10. Community events were rated higher with a total positive rating of 71% compared to 62% overall.
11. Slightly lower ratings for ‘attractiveness of centre’: 72% had a positive view (satisfactory or above), compared to 77% in the overall survey.
12. Closest town centres to respondents’ homes are Twickenham and Barnes (both 21%), followed by St Margarets and Teddington (12.5% each). In the overall survey, only 5% said Barnes was their closest centre, and only 2% said it was St Margarets. Figures for Twickenham and Teddington were very similar in the overall results.
13. Reasons for not visiting their local centre were quite different than in the overall results, with a more even spread of responses across the options. The main reason given was ‘mobility issues‘, with 33% saying it stopped them from visiting more often. This was a hindrance to only 9% in the overall results. Lack of appropriate shops/facilities’ was given as second most chosen reason, at 29% (compared to 42% in the overall results). Limitations due to health came next at 25% (8% overall), while lack of seating was a problem for 21% (14% overall). Parking issue were less of a problem, stipulated by 16% compared to 21% overall.
14. The overall positive satisfaction level (satisfactory or above) is higher at 96% than the overall survey (91%). However, there were no ‘excellent’ ratings, while overall they amounted to 2%.

**Leisure and Culture Satisfaction Ratings by Village**

The satisfaction ratings for leisure and culture options were the lowest of those factors polled with a total of 25% of people rating them ‘poor’ or ‘very poor’ hence further analysis has been completed to obtain more detail.

­The table below shows the isolated data for respondents’ view of leisure and culture options in their most visited centre:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|   |   |   | **Rating** |   |   |   |
| **Village** | **Excellent** | **Good** | **Satisfactory** | **Poor** | **Very Poor** | **No View** |
| Richmond | 5 | 19 | 22 | 2 |   | 2 |
| Twickenham |   | 13 | 11 | 17 | 4 | 3 |
| Whitton |   |   | 7 | 6 | 4 | 3 |
| Teddington |   | 8 | 9 | 2 | 2 | 2 |
| Hampton Hill | 1 | 4 | 6 |   |   |   |
| Hampton Wick |   |   |   | 1 |   |   |
| Hampton |   |   | 3 |   |   | 1 |
| Kew |   | 1 | 1 | 1 |   |   |
| Heathfield |   |   | 1 |   | 1 |   |
| Barnes | 1 | 1 | 4 |   |   | 1 |
| East Sheen |   | 1 | 4 | 2 | 1 | 2 |
| St Margarets |   |   |   | 1 | 1 |   |
| Strawberry Hill |   |   | 1 | 1 |   |   |
| Total | 7 | 47 | 69 | 33 | 13 | 14 |

The graph below gives a visual representation of the spread responses per respondent:

Conclusion

Twickenham and Whitton stand out as having lower leisure and culture satisfaction ratings compared to the rest of the borough. Of the 48 that answered the question for Twickenham, 21 stated that the leisure and culture options were ‘poor’ or ‘very poor’. Of the 20 answers in Whitton, half of respondents stated that the leisure and culture options were either ‘poor’ or ‘very poor’. St Margarets, Heathfield and Hampton Wick also rated poorly however this is warped by the fact that there were only 2 respondents for the first 2 and 1 for the latter.

Richmond has the best satisfaction ratings for leisure and culture with 46 of the 50 respondents rating it positively (satisfactory or above). Teddington follows, with 17 positive ratings out of 23.

**Breakdown of findings by age bracket**

35-44 (7 out of 187 respondents)

1. Richmond was the most visited centre.
2. The majority of respondents visit every day.
3. ‘To shop’ was stated by all respondents as a reason for visiting, and ‘to eat out’ was the second most popular reason.
4. Retail options and feeling safe were seen as most important.
5. Variety of shops and pavements were seen and main areas for improvement.
6. Transport links received the highest satisfaction ratings and community feel and culture & leisure options the lowest.
7. The main reason stated for not visiting their local centre more often was a lack of appropriate shops/facilities.
8. Mixed satisfaction ratings for the boroughs town centres overall, with ‘satisfactory’ being the most popular opinion.

45-54 (15 out of 187 respondents)

1. Richmond was the most visited centre.
2. The majority of respondents visit 2-3 times a week.
3. ‘To shop’ was stated by 12 respondents as a reason for visiting, the next most popular reason being ‘to eat out’ (8 out of 15).
4. Retail options, attractiveness and feeling safe were seen as most important.
5. Better variety of shops received the most suggestions for improvement.
6. Transport links received the highest satisfaction ratings and culture and leisure options the lowest.
7. The main reason stated for not visiting their local centre more often was a lack of appropriate shops/facilities.
8. Fairly good ratings for the boroughs town centres overall, with ‘satisfactory’ being the most popular opinion.

55-64 (34 out of 187 respondents)

1. Twickenham was the most visited centre.
2. The majority of respondents visit 2-3 times a week.
3. ‘To shop’ was stated by the vast majority of respondents as a reason for visiting, followed by ‘to eat out’.
4. Good transport links, retail options and attractiveness of the centre were most important.
5. Better variety of shops received the most suggestions for improvement though parking and support of local businesses were important to a high number of respondents and both were the second most suggested area for improvement.
6. Transport links received the highest satisfaction ratings and culture and leisure options the lowest.
7. The main reason stated for not visiting their local centre more often was a lack of appropriate shops/facilities, followed by parking issues.
8. Good ratings for the boroughs town centres overall with ‘good’ being the most popular opinion.

65-74 (81 out of 187 respondents)

1. Richmond and Twickenham were the most visited centres (23 and respondents respectively)
2. The majority of respondents visit 2-3 times a week.
3. ‘To shop’ was stated by the vast majority of respondents as a reason for visiting.
4. Good transport links, attractiveness of the centre and retail options were most important.
5. Better variety of shops received the most suggestions for improvement though support of local shops was important to a high number of respondents and was the second most suggested area for improvement.
6. Transport links received the highest satisfaction ratings and culture and leisure options and community events the lowest.
7. The main reason stated for not visiting their local centre more often was a lack of appropriate shops/facilities.
8. Good ratings for the boroughs town centres overall with ‘good’ being the most popular opinion, followed very closely by ‘satisfactory’.

75-84 (37 out of 187 respondents)

1. Richmond and Twickenham were the most visited centres.
2. The majority of respondents visit 2-3 times a week.
3. ‘To shop’ was stated by the vast majority of respondents as a reason for visiting.
4. Good transport links and retail options were most important.
5. Better variety of shops received the most suggestions for improvement.
6. Transport links received the highest satisfaction ratings and community feel the lowest (highest number of people rated it as poor or very poor). However, this low score is only very slightly lower than the scores for community events and culture and leisure options.
7. Lack of appropriate shops/facilities was mentioned most often as a reason against visiting local centre more often.
8. Good ratings for the boroughs town centres overall with ‘good’ being the most popular opinion.

85+ (12 out of 187 respondents)

As this is a small group of respondents these results should not be taken as being representative of this age group as a whole but are useful as an insight.

1. Respondents listed Twickenham, Richmond and Barnes as the centres they visit most often.
2. Equal numbers of respondents visit every day and 2-3 times a week.
3. ‘To shop’ was stated by all but one respondent as a reason for visiting.
4. Good transport links were specified by 7 respondents to be one of the most important factors, followed by retail options (5).
5. Better variety of shops, street furniture and pavements all received the most suggestions for improvement (6 of the 12 respondents selected these).
6. Transport links received the highest satisfaction ratings whilst all of the other factors received ratings of satisfactory or higher, with ‘good’ being the most selected option across all the factors. ‘Community events’ received most ‘satisfactory’ ratings, which makes them the lowest rated factor.
7. Health and mobility issues were the main factors for respondents not attending more regularly than they already do.
8. Each but one respondent felt that the town centres in the borough were ‘good’ overall. The one rating was ‘satisfactory’.

Conclusion

Breaking the results down into age brackets revealed similar headline results to the overall survey with the main findings described in the survey’s conclusion standing for each age bracket. Two differences to note are:

* Those who are aged 85 or above state that mobility issues and ill health seating discourage them from going to their local centre more often; these factors are not seen as issues for those aged below 85.
* Those aged 75-84 gave the lowest rating to ‘Community feel’ among different town centre factors. This suggests ‘community feel’ might be more important to them than to other age groups, in which ‘culture and leisure options’ received lowest ratings.

**Comparison with the All in One Survey (2010)**

The All in One survey was a borough-wide consultation carried out in late 2010 which received a total of 13,585 responses.

Three key factors to note when comparing the two surveys are:

* The Town Centre Opportunities survey was asking specifically about town centres while the All in One survey concentrates on the whole borough.
* The Town Centre Opportunities survey focussed on capturing the views of a particular segment of the population (older residents), and although respondents from other age groups did contribute, the majority of the sample is from this group. The All in One survey has a balanced representation from different age groups.
* The All in One survey has a much wider sample base (13,585 compared to 187 for the Town Centre Opportunities survey) providing a greater representational sample.

There were two questions asked in the All in One survey that can be compared to those asked in the Town Centre Opportunities survey: ‘What are the three most important things in making your area a good place to live’ and ‘Which three things most need improving in your local area’.

‘Good transport links’ and ‘retails options’ were the top 2 answers in the Town Centre Opportunities survey (results in Appendix 1) to the question ‘Which of the following do you consider most important when visiting a town centre?’. Two similar options: ‘shopping in high street’ and ‘public transport’ were the third and fourth most popular answers in the All in One survey (results in Appendix 2) to ‘What are the three most important things in making your area a good place to live’. The most popular option, ‘parks’, was not relevant to the Town Centre Opportunities survey.

Both surveys agree that retail options/shopping in high street and good transport are very important to residents in the borough.

The four most popular answers in the All in One survey to ‘Which three things most need improving in your local area?’ are: ‘traffic and levels of congestion’, ‘condition of pavements’, ‘shopping in your local high street’ and ‘provision of parking’. These answers are similar to three of the six most popular answers in the Town Centre Opportunities survey to ‘What improvements could be made to increase the enjoyment of the town centre that you visit most often?’ which are: ‘better variety of shops’, ‘parking’ and possibly ‘shop frontage appearance’.

Both surveys agreed that shopping in the high street and parking were things that they would like to see improved. The shopping options and transport are very important to people as the analysis of the first question showed.

Conclusion

The comparison of the Town Centre Opportunities survey and the All in One survey highlights a number of similarities in what people view as being important and what they would like to see improved in the boroughs town centres. This reinforces analysis completed previously that the headline results are similar for residents across the age ranges, e.g. desire for better shops and good transport.

**Appendix 1**

Town Centre Opportunities Survey

Asked ‘Which of the following do you consider most important when visiting a town centre’ the five most often mentioned were:

* + - 66% - Good transport links
		- 64% - Retail options
		- 48% - Feeling safe
		- 43% - Attractiveness
		- 33% - A sense of community

Asked ‘What improvement(s) could be made to increase the enjoyment of the town centre that you visit most often’, the six most often mentioned were:

* + - 57% - Better variety of shops
		- 30% - Parking
		- 33% - Support of local business
		- 27% - Street furniture
		- 23% - Shop frontage appearance
		- 22% - Public transport

**Appendix 2**

All in One Survey

Asked ‘What are the three most important things in making your area a good place to live, the five most often mentioned were:

* + - 73% - Local parks and open spaces
		- 38% - Levels of crime and anti-social behaviour
		- 35% - Shopping in your local high street
		- 34% - Public transport
		- 20% - Library services

Asked ‘Which three things most need improving in your local area’, the five most often mentioned were:

* + - 34% - Traffic and/or levels of congestion
		- 30% - Conditions of the pavements
		- 22% - Shopping in your local high street
		- 21% - Provision of parking
		- 20% - Condition of roads