

Report on Staines Town Centre Pedestrian Surveys 1998-2006 May 2006



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Staines Town Centre Pedestrian Surveys

1998 to 2006

May 2006

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1. Introduction

- 1.1 Staines town centre has been transformed by a series of development schemes since 1998. The Two Rivers Shopping Centre, pedestrianisation of the High Street, new two-way traffic scheme, the recent refurbishment of Elmsleigh Centre and other environmental improvements have all contributed to a physically enhanced shopping environment.
- 1.2 Since 1998, the Council has undertaken annual counts of pedestrian movements within the shopping area of Staines Town Centre to provide an indication of the relative changes in the numbers of people shopping. Changes in the number of shoppers present are considered to be both a useful indicator of changes in the vitality and viability of the town centre as a whole and also a measure of the impact of new developments and environmental improvements on the attractiveness of Staines as a shopping destination.
- 1.3 The purpose of this report is to explain how the surveys have been conducted, the findings of these surveys, and what they indicate about the effect of the various changes in the town centre.
- 1.4 The report includes the findings of the latest survey undertaken between 20 May 2006 and 27 May 2006 which may be summarised as follows;
 - a) The 2006 counts have, as in 2005, continued to show a rise in overall pedestrian counts experienced since 2002.
 - b) The figures for 2006 are the highest since surveys began in 1998 and show an increase of approximately 1.7% over 2005 counts.
 - c) The 2005 count showed a 16% increase at the then recently refurbished High Street entrance to Elmsleigh Centre, this trend has continued with a further 10% increase on the 2005 count.
 - d) Together the counts at Norris Road and Tilly's Lane (the main entry/exit points from Two Rivers to the core shopping area) have increased from 38,760 in 2000 to 71,472 in 2006 which reinforces the successful integration of Two Rivers Shopping Centre with the Town Centre.
 - e) The footbridge over the River Colne is continuing to see a similar pedestrian flow as that of 2005 where a marked increase was seen which was in part attributed to the opening of TK Maxx in place of Staples in Two Rivers.

2. Survey Methodology

General

- 2.1 It is not feasible to count all shoppers present within a town centre as a whole, either at a single point in time or over a period of time, due to the resources required. Therefore, the normal method of providing at least a measure of relative change in numbers of shoppers in a town centre is to undertake sample counts of pedestrians at fixed points. The survey points, used in Staines are explained in greater detail at 2.3.
- 2.2 The sampling approach used for Staines has involved surveys at both core and entry points to the shopping area which then give an indicator of pedestrian movement within the centre as a whole. The results allow both overall changes to be measured from year to year for the whole centre and also provide a basis for assessing relative change in movements in different parts of the main shopping area of the town.
- 2.3 Surveys are normally undertaken in May which, in retail terms, is a relatively average period of the year avoiding Christmas, main sales, holidays, and extremes of weather. The exception to using May was in 1999, when a single survey was undertaken in October (also an average month) on the Wednesday only.
- 2.4 For the Staines surveys, 5 minute counts have been undertaken at each point once every hour. This is a standard time used in most pedestrian surveys. The results from these can be multiplied by twelve to give an hourly equivalent flow.
- 2.5 The surveys have been undertaken by 3 surveyors taking 4 locations each. The first count is commenced at 30 minutes past the hour, and when complete, the surveyor proceeds to the next point to take the next five minute count. The 'run' of four counts takes place between 30 minutes past and 55 minutes past the hour. All results have nominally been recorded as being at 30 minutes past the hour. Each surveyor is rotated around the three blocks of four survey points to average out the discretion in determining those to be counted.
- 2.6 In common with most surveys of this nature, only adults – people judged to be 16 years old or over – have been counted. Children have not been included in the count. Those working on the highway or assisting in the operation of the town centre, e.g. policemen, construction workers, security guards etc, have not been included. People in wheelchairs, motorised or otherwise have been included as pedestrians. The counts have included pedestrians travelling in either direction past the survey point.

Survey Methodology

- 2.7 The surveys are undertaken on the three days of the week considered to have a low, medium and busy pedestrian flow. Tuesday has historically been the day with the lowest level of pedestrian movement, Wednesday is a market day and is a weekday normally experiencing higher pedestrian flows and Saturday is the busiest day of the week. Whilst they are considered good representative shopping days by which to measure relative change, the survey is unable to show the relative pedestrian levels and changes on other days. In recent years, the development of Sunday as a

shopping day has undoubtedly increased shopping activity in the town centre as a whole.

- 2.8 In 2004 all seven days of the week were surveyed to evaluate the full effect of the completed High Street pedestrianisation scheme as well as the other town centre improvements. It was also thought that counts for all seven days of the week would be helpful in testing the soundness of the assumption made under para 2.7. A survey of all survey points was undertaken on Tuesday, Wednesday and Saturday. On the remaining days i.e. Monday, Thursday, Friday and Sunday a shorter survey using the 5 survey points in the core shopping area was conducted. Figure 19 shows the comparative counts on each day of the week surveyed in 2004.
- 2.9 In 2006 the survey was undertaken as normal on three days of the week.

Survey Points

- 2.10 Survey points are shown on the plan at Appendix 1. The first survey in 1998 involved 8 main points, and at three of these (High Street – Iron Bridge, High Street – east of Marks and Spencer, High Street – east of Debenhams), separate counts are made for the north and south side of the road, making 11 separate counts. With the pedestrianisation of the High Street in October 1999, counts from May 2000 combined the counts north and south of the High Street respectively east of Marks and Spencer and Debenhams. Additional survey points were added for Norris Road in 1999, Two Rivers Footbridge over the River Colne in 2000, the Elmsleigh Centre Café entrance in 2001, and Tilly’s Lane and Footbridge over the River Colne in Church Street in 2002. The additional survey points in the main reflect new entry points to the Two Rivers shopping centre. The Elmsleigh Centre Café entrance was added to give a more complete picture of movement into the town centre from the south via the Elmsleigh Centre but was not surveyed in 2006 because it was closed due to building works.
- 2.11 The process of addition and combination of survey points has now resulted in 14 standard survey points overall, two of which (Iron Bridge – north and south and Clarence Street/Church Street) are counted simultaneously, resulting in 12 separate count points.
- 2.12 The primary purpose of the survey is to provide a basis by which relative changes in pedestrian movement and therefore the relative change in overall number of shoppers in the town can be assessed. Because it is a sample survey, and the count must take place at specific definable points, there are a number of important qualifications that need to be recognised.
- a) Whilst the survey points seek to cover the main entry points into the main shopping area, there are some entry points which are not covered:
 - i. Access to Two Rivers via Hale Street and Mustard Mill Road
 - ii. Access to the Elmsleigh Centre via the Elmsleigh multi-storey car park (which is above it).
 - iii. Access to Debenhams and the west end of the High Street via Goodman Place.

iv. Access to the High Street from South Street or via Mustard Mill Road.

Observation suggests that access via these points is probably limited and is unlikely to alter the 'picture' of relative change established from the survey points used.

- b) A relatively large number of people do arrive in Staines to shop via the Two Rivers Car Park. Some may confine their shopping to the shops in the main part of Two Rivers and not pass a survey point. Those entering the shopping area via this car park have not been counted because of the difficulty of defining a clear counting point as there is direct access from the car park to the shops. Car parking use suggests this car park is very popular and at times operating close to capacity. Use of this car park and contribution to the vitality of the town needs to be borne in mind in drawing conclusions about the town centre as a whole.
- c) Some survey points can be bypassed by routes through shops, e.g. access to the Elmsleigh Centre from the High Street via Woolworths and Marks and Spencer.
- d) Some survey points are close to particular shops and referred to in the description of the survey point. However, the counts are of people in the street, and not those entering particular premises and therefore it should not be assumed that changes in pedestrian flows at particular points are necessarily reflected in the custom of particular shops.

3. Survey Findings

Factors affecting the survey findings of 2006

- 3.1 At the time of the 2006 survey reconfiguring work was taking place within the Elmsleigh Centre. The work affected BHS, 11 of the adjoining stores and the Café which were all present at the time of the 2005 survey. However, of the 11 individual smaller stores affected 5 of these had relocated to previously vacant stores within the Centre so stores which contribute to the vitality of the town centre still remain. As a result only 2 accessible stores were vacant at the time of the survey, considerably less than the 11 vacant stores in 2005.
- 3.2 The reconfiguration work within the Elmsleigh Centre also included the temporary closure of the Elmsleigh Centre Café Entrance therefore only 11 survey points were used for the 2006 counts. Being the only entrance at the south of the Elmsleigh Centre the Bus Station entrance count has increased significantly as a result, although the total pedestrian flow does not equal that of the counts taken at both the Bus Station and Café entrances at the 2005 count.
- 3.3 Throughout the day on all three survey days, but particularly Tuesday and Wednesday, there were significant showers of rain. This does not seem to have had a large effect on the results but should be taken into consideration when drawing any conclusions from this year's results.
- 3.4 Due to resources one of the Saturday counts was split between two Saturdays. The 9.30am to 1pm counts took place on 20 May 2006 with the 1.30pm to 5pm counts taking place on 27 May 2006. Although this second Saturday fell on the first weekend of the school Summer Half term it was not considered that this day would vary greatly from any other given Saturday.
- 3.5 Appendix 4 lists the various development works carried out in Staines Town Centre since 1998 which may have had a bearing on pedestrian counts on survey days.

Presentation of Results

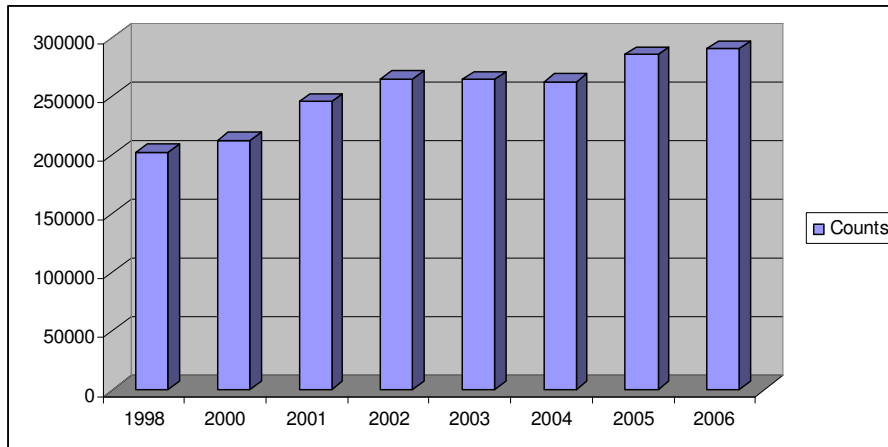
- 3.6 As the survey is normally conducted on three days of the week; Saturday, Tuesday and Wednesday, the analysis is presented for these three days to show a comparative and consistent time series data since 1998. This is presented in Figure 2.
- 3.7 In 1999 the survey was conducted on one day only and therefore due to inconsistency this information has not been presented in most tables.
- 3.8 Results have been presented as a sum total of the factored count of three surveyed days either at particular survey point/s or for the town centre as a whole.

Survey Results

- 3.9 Tables A2(1a) and A2(1b) (Appendix 2) give details of the total numbers counted at all survey points for all survey dates in the form of a table. In that table, the total flow for the 8 hour period is given for each survey point for each survey day. Totals are given

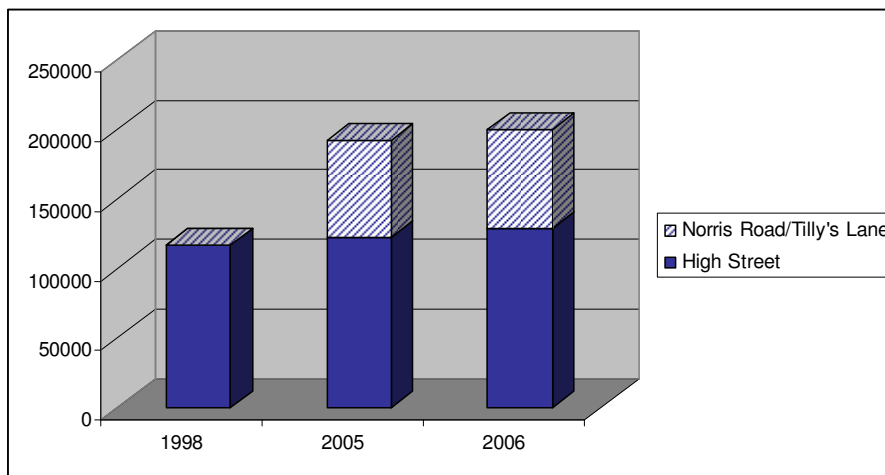
for each day across all survey points at the bottom of the table. Simply adding the total hourly flows for three days gives a figure of 202,548 in 1998 and 290,244 in 2006 – a growth of 43.3% in the numbers of people counted which in part may be because of the additional survey points since 2002 as a result of the Two Rivers and other town centre developments. However even comparing year on year there is an increase of approximately 1.7% in 2006 over 2005. The results are presented in Figure 1 below. As shown the counts are the highest in 2006.

Figure 1 Sum total of the three day counts since 1998



3.10 Figure 2 shows the counts for 1998, 2005 and 2006 for the entry and exit survey points on the High Street. The data used for the chart is presented in Appendix 3. There is an overall increase of about 47% in the counts. The hatched section of the bar shows the flow to and from two rivers.

Figure 2 Count of pedestrians entering and exiting the core section of the High Street over the 3 survey days



3.11 At Table 1, the number of pedestrians passing the four core locations in the shopping area are given. These cover the High Street and Elmsleigh Centre. In 2006 there is a rise in the numbers at each survey point in comparison to previous years in all areas except at High Street – Debenhams going some way to reverse the marked increase in the pedestrian flow at this point in 2005. The most notable increases are at the

High Street and Bus Station entrances to the Elmsleigh Centre at 10% and 33% over 2005 counts respectively. The reason for the increase in the Bus Station entrance figure is discussed at paragraph 3.2. The figures at the Elmsleigh Centre entrances and at the High Street – Marks & Spencer are the highest recorded since surveys began in 1998.

Table 1 Comparison of Core High Street/Elmsleigh Centre Survey Points 1998 – 2005 (Total Of Three Survey Days)

	1998	2000	2001	2002	2003	2004	2005	2006
High Street-Marks and Spencer	27,960	23,028	23,088	27,072	27,276	27,888	28,656	31,860
High Street-Debenhams	44,964	41,088	42,468	38,172	38,304	37,572	42,912	41,256
Elmsleigh Centre-High Street	44,112	46,428	44,928	47,052	47,268	43,356	50,244	55,392
Elmsleigh Centre-Bus Station	22,368	21,192	20,328	22,068	20,472	21,384	22,404	29,964
Total	139,404	131,736	130,812	134,364	133,320	130,200	144,216	158,472

3.12 Table 2 shows results from the same survey points but for Saturday only. In 2006 the figures for all the survey points are the highest since 1998. At the western end of the High Street there is no definite pattern but overall there seems to be a decline since 1998. This may be because of a reduction in the car parking spaces at Riverside car park but there is also scope for people to get to the central section of the High Street via the Two Rivers shopping area.

Table 2 Comparison of Core High Street/Elmsleigh Centre Survey Points 1998 – 2005 Saturday Only

	1998	2000	2001	2002	2003	2004	2005	2006
High Street-Marks and Spencer	11,856	9,648	7,704	10,164	11,268	9,948	10,788	12,216
High Street-Debenhams	21,252	18,468	19,308	16,020	17,748	15,684	16,800	16,944
Elmsleigh Centre-High Street	20,508	21,408	20,772	22,920	22,932	20,076	23,628	26,376
Elmsleigh Centre-Bus Station	9,504	9,600	8,280	9,624	8,004	9,264	10,188	13,788
Total	63,120	59,124	56,064	58,728	59,952	54,972	61,404	69,324

3.13 Table 3 makes a comparison of the four core survey points shown in Tables 1 and 2 with the counts for Norris Road and Tilly's Lane for all three survey days. This shows the level of pedestrian movement generated at the main entry/exit points to the Two Rivers shopping area from the existing core shopping area. The figures represent a measure of movement within the core of the shopping area and suggest a growth in pedestrian numbers across the survey points as a whole of 65% between 1998 and 2006. Combining the figures for Norris Road and Tilly's Lane gives a total for the flow between Two Rivers and High Street. This shows an increase from 38,760 in 2000 to 71,472 in 2006 suggesting a successful integration of the Two Rivers scheme with the rest of the town centre. The significant increases seen in previous years at the entry points from Two Rivers i.e. Norris Road and Tilly's Lane appear to be reducing in magnitude.

Table 3 Pedestrian flows at the extension and new core survey points in the town centre 1998 – 2005

	1998	2000	2001	2002	2003	2004	2005	2006
Core Area	139,404	131,736	130,812	134,364	133,320	130,200	144,216	158,472
Norris Road	-	38,760	45,144	47,448	45,720	46,692	51,960	52,164
Tilly's Lane	-	-	-	12,240	16,140	15,480	18,312	19,308
Total	139,404	170,496	175,956	194,052	195,180	192,372	214,488	229,944

3.14 Table 4 compares the counts at those survey points which are entry locations to the core shopping only. No definite pattern emerges from the totals with the figure going up to the highest point in 2002 and then dipping in 2003 and going up again in 2005. The counts at Thames Street have declined since 2002 which coincides with the time when works started for enhancement of Memorial Gardens and reduction in the size of Riverside Car Park. The counts from Church Street and Clarence Street have also shown a decline when compared to the 1998 figures although the 2006 figure for Church Street shows a marked increase over the 2005 figure, possibly due to the refurbishment at the River Thames with the addition of bars and restaurants. There has been a steady increase in the counts at the footbridge over River Colne and the particularly high counts in 2005 after the opening of TK Maxx in 2005 has been sustained.

Table 4 Pedestrian flows at entry points into the core shopping area

	1998	2000	2001	2002	2003	2004	2005	2006
Iron Bridge	18,084	16,068	16,260	17,664	17,208	18,756	18,096	17,484
Elmsleigh Bus Centre	22,368	21,192	20,328	22,068	20,472	21,384	22,404	29,964
Elmsleigh Café Entrance	-	-	12,036	13,260	12,780	11,220	11,112	-
Thames Street	13,920	11,076	12,648	9,360	8,748	8,424	9,660	9,492
Church Street	8,496	5,808	5,184	7,488	5,892	6,732	4,908	6,072
Clarence Street	22,044	-	13,884	10,404	11,520	11,532	10,560	10,680
Footbridge Over River Colne	-	8,532	9,396	10,248	10,056	10,404	13,608	13,704
Totals			89,736	90,492	86,676	88,452	90,348	87,396

3.15 Table 5 assesses the degree of change in pedestrian flows between the three survey days over time. To account for differences in number of survey points between the years, flows on each day are shown as a percentage of total pedestrians counted in three days. Overall in the last three years there seems to be a slight decline in the percentage of Saturday shoppers and an increase in the percentage on Wednesdays although in 2006 both days have seen a percentage increase compared to 2005. In recent years weekend shoppers also have the alternative of Sunday as a shopping day which may explain the slight overall decline in the percentage on Saturdays.

Table 5 Daily totals as % of total pedestrians counted over the 3 survey days 1998 – 2005

	1998	2000	2001	2002	2003	2004	2005	2006
Tuesday	25.75	23.19	27.07	26.52	24.77	27.44	25.44	24.39
Wednesday	29.18	30.22	29.67	29.18	29.87	31.36	31.97	32.26
Saturday	45.06	46.58	43.25	44.29	45.34	41.20	42.59	43.35

3.16 Charts 3, 4 and 5 show the factored hourly flow rates for each of the three survey days for the years 2005 and 2006. This shows the change in numbers of pedestrians counted throughout the day.

Figure 3 Pedestrian flows – comparison through the day (Tuesday) 2004/2005

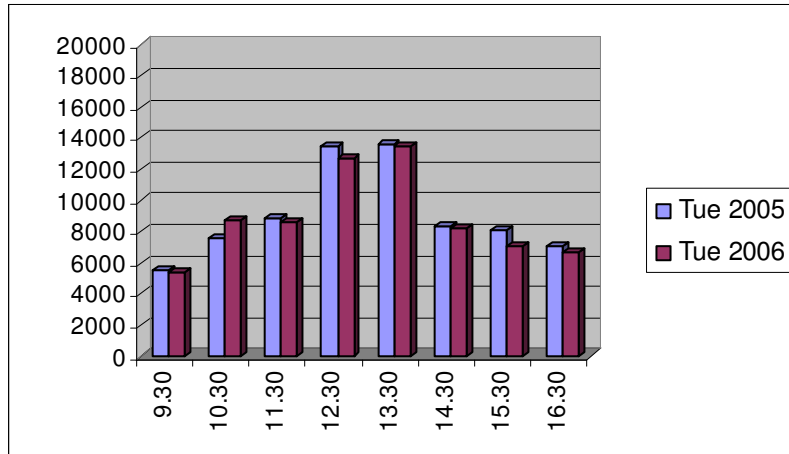


Figure 4 Pedestrian flows – comparison through the day (Wednesday) 2004/2005

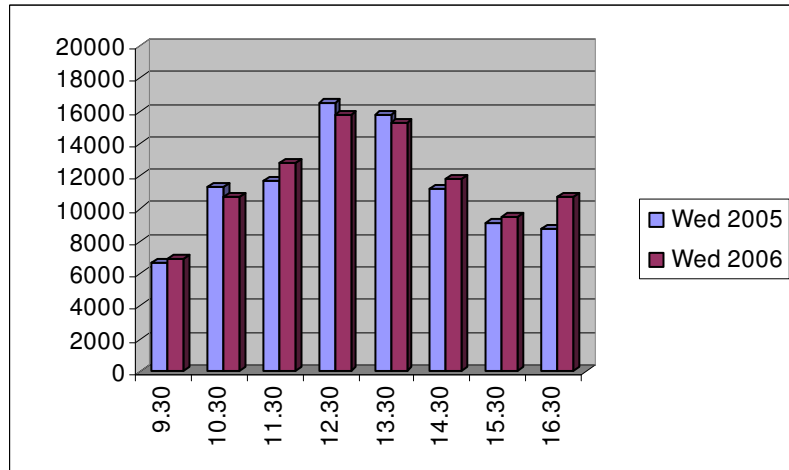
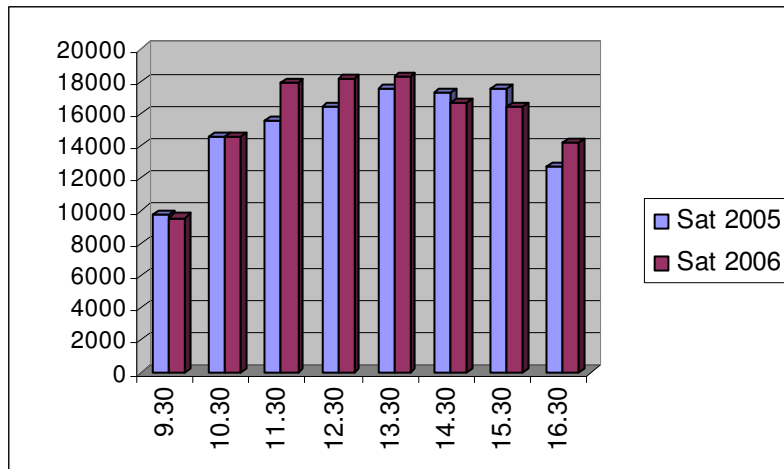


Figure 5 Pedestrian flows – comparison through the day (Saturday) 2004/2005



3.17 In the following series of bar charts are the factored pedestrian flows for all three survey days at each of the survey points since 1998. Please see Tables A2 (1a) and A2 (1b) (Appendix 2) for the data pertaining to these charts. (In 1999 the deviation in trend is due to a single survey undertaken in October)

Figure 6 Pedestrian Flows (3 survey days) - Iron Bridge

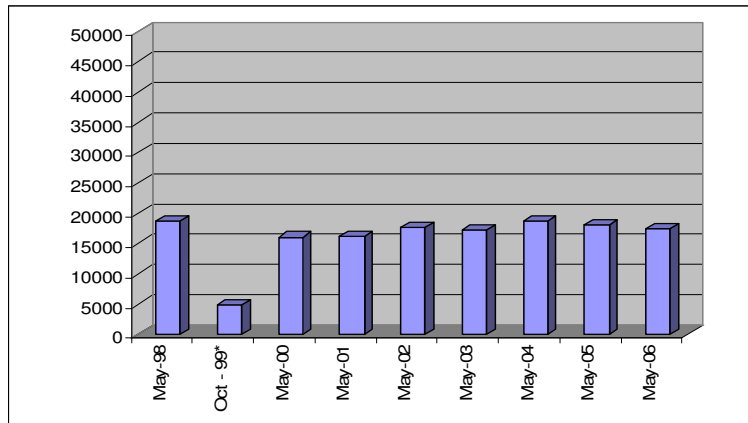


Figure 7 Pedestrian Flows (3 survey days) - High Street – Marks & Spencer

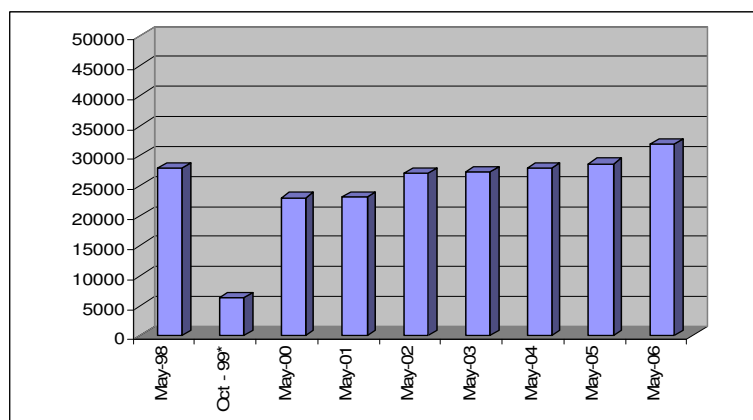


Figure 8 Pedestrian Flows (3 survey days) - Elmsleigh Centre – High Street entrance

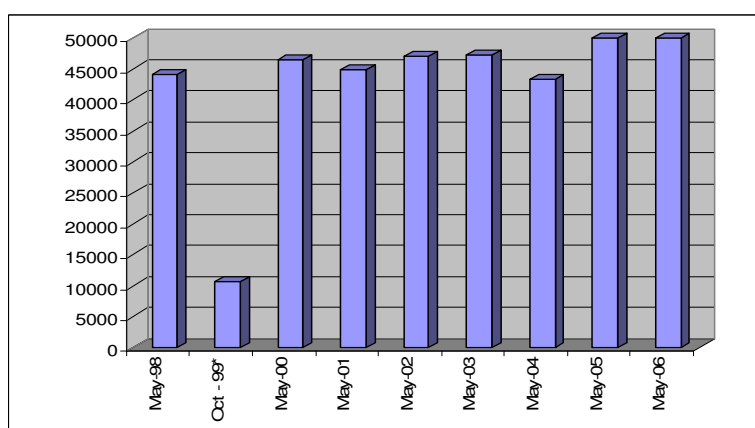


Figure 9 Pedestrian Flows (3 survey days) - Elmsleigh Centre – Cafe entrance

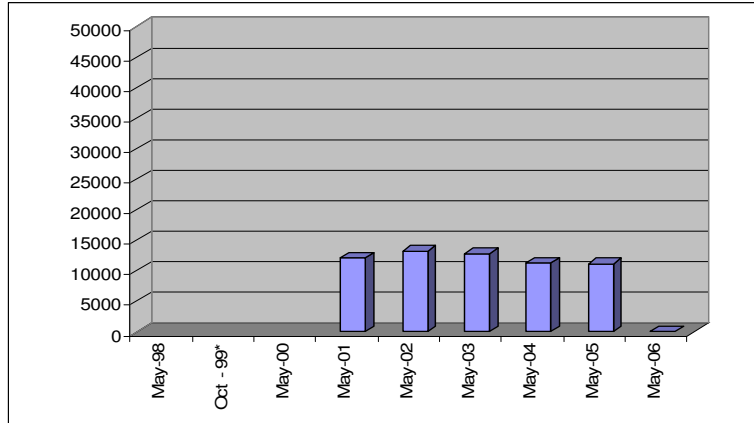


Figure 10 Pedestrian Flows (3 survey days) - Elmsleigh Centre – Bus Station entrance

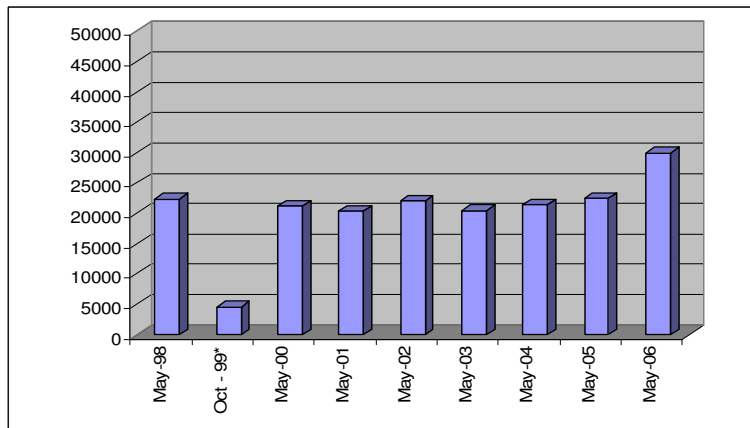


Figure 11 Pedestrian Flows (3 survey days) - High Street – Debenhams / Nationwide (East)

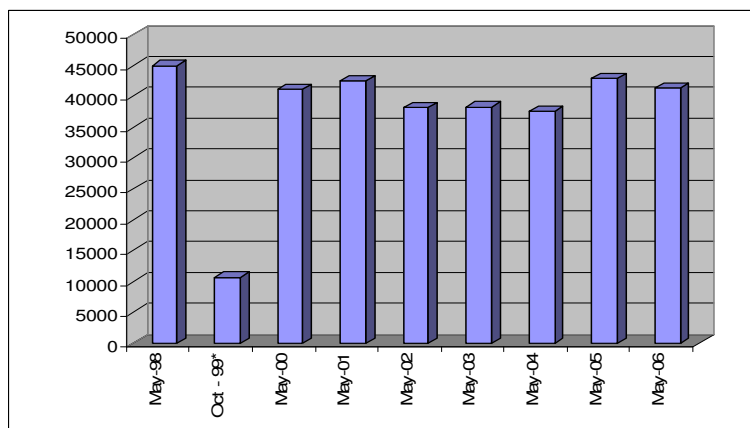


Figure 12 Pedestrian Flows (3 survey days) - Thames Street - South of Debenhams

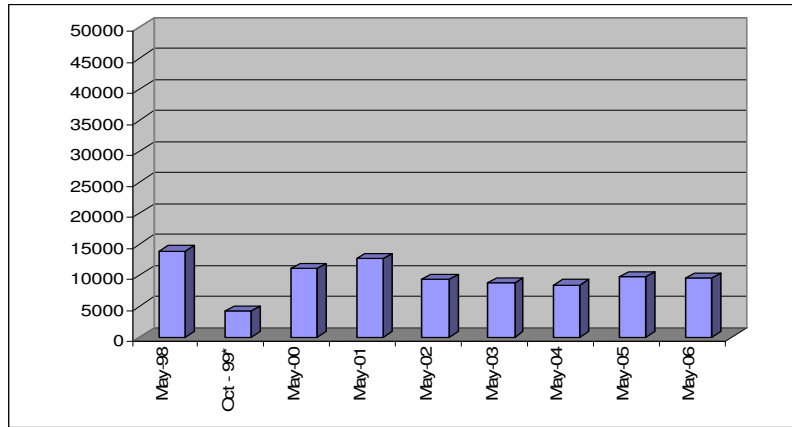


Figure 13 Chart 13: Pedestrian Flows (3 survey days) - Church Street – West of the George P.H

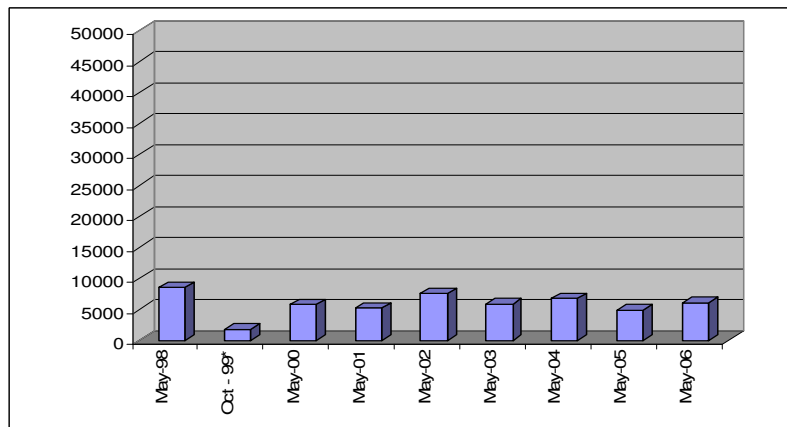


Figure 14 Pedestrian Flows (3 survey days) - Church Street – Footbridge to Two Rivers

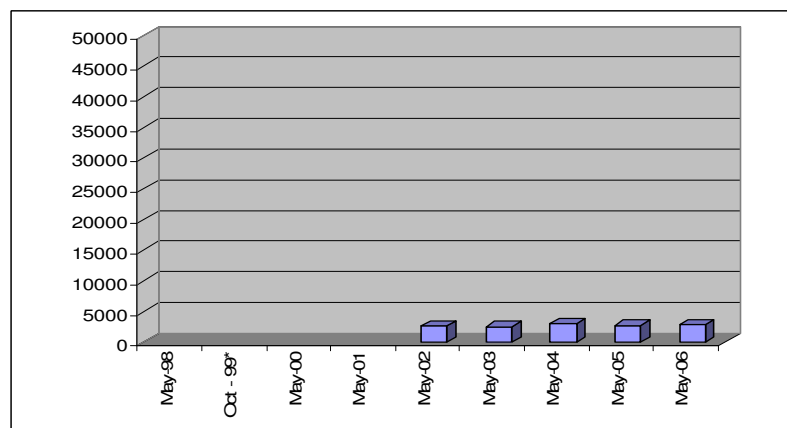


Figure 15 Pedestrian Flows (3 survey days) - Footbridge over river Colne

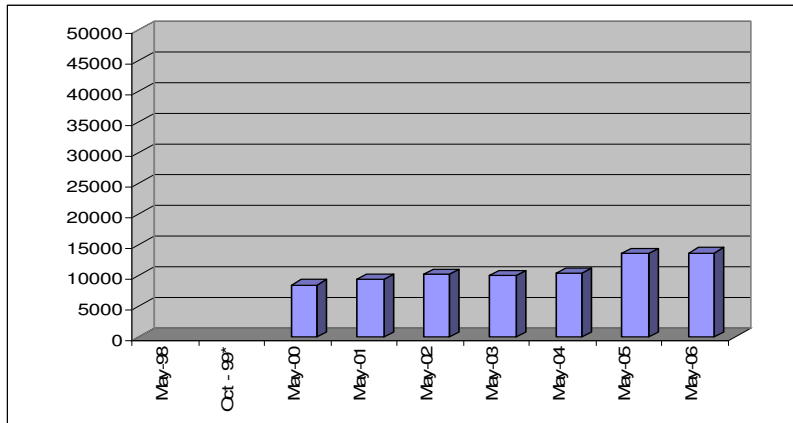


Figure 16 Pedestrian Flows (3 survey days) - Clarence street outside blue anchor P.H - both sides of street

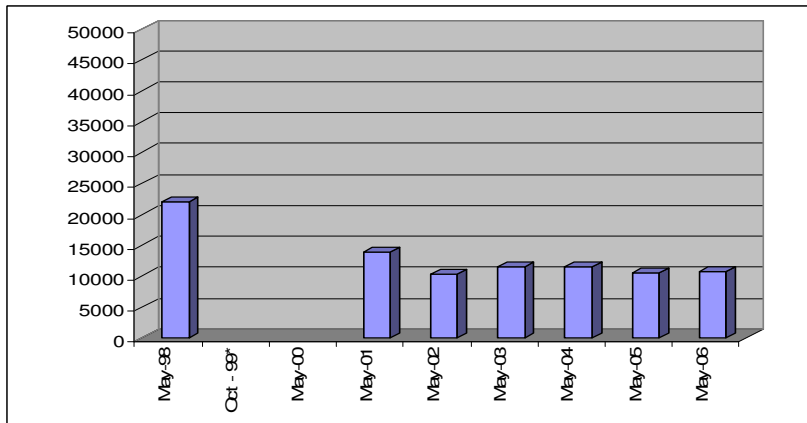


Figure 17 Pedestrian Flows (3 survey days) - Tilly's lane

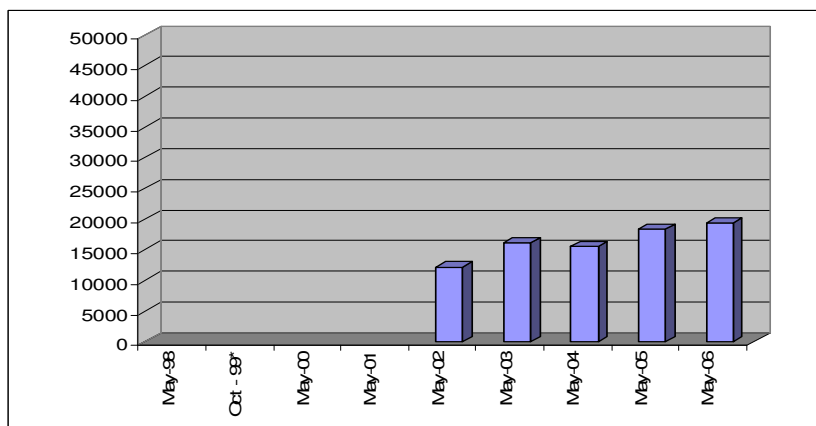
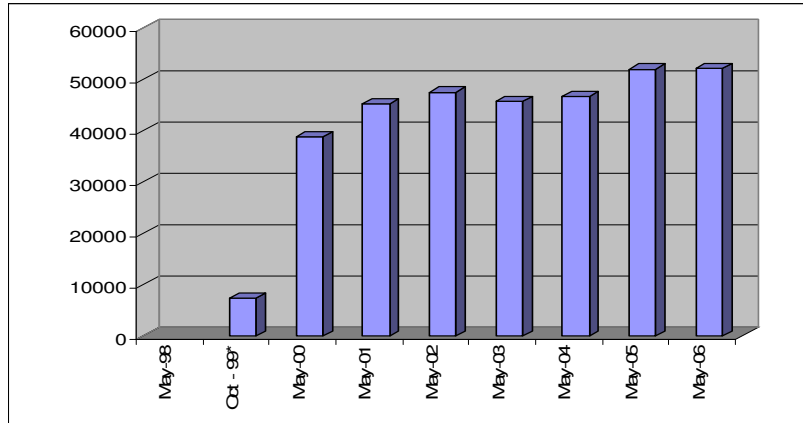


Figure 18 Pedestrian Flows (3 survey days) - Norris road – South end



4. Analysis

- 4.1 This section of the report analyses the survey results between 1998 and 2006. It assesses the actual changes that have occurred and the extent to which these can be related to the retail improvement in the town and other improvements.
- 4.2 At the outset, it needs to be recognised that the surveys are sample counts and inevitably it is likely that there would be some variation in shopper numbers and therefore pedestrians present from day to day and week to week. This can arise from factors such as weather, new or changed facilities, promotions in particular stores, and natural variations that can occur. This part of the report therefore seeks to look not only at the results, but some of the factors likely to affect shopper numbers.
- 4.3 For all of the surveys there was fairly good weather, with no day having prolonged rain although in 2006 there were showers all day, particularly in the Tuesday and Wednesday counts. The Tuesday in 2003 did have some showers in the morning which may explain why that survey day appeared to show lower figures out of step with the patterns of previous years and the other two survey days in 2003.
- 4.4 In Appendix 4 is a list of major works/schemes likely to have either had an impact on pedestrian movement since 1998, including the opening of new schemes attracting additional people to the town. The impact of these is summarised as follows:
- a) The reconfiguring work taking place within the Elmsleigh Centre in 2006 affecting BHS, 11 of the adjoining stores and the Café involved the relocation of some stores into previously vacant units along the main thoroughfare within the centre. As a result only 2 units were vacant at the time of the survey. The reduction in vacant stores may have improved public perception of the Elmsleigh Centre as a whole, despite the improvements and may have been a contributing factor in the increase in the flow of pedestrians through it.
 - b) At the time of the 2005 surveys, for the first time since 1998 there was no disruption due to any on-going construction works in the town centre. The refurbishment of the High Street entrance to Elmsleigh Centre had been completed with a greatly improved and inviting façade. In addition various new skylights within the shopping centre add to the modern and open feel. These improvements may have led to the increase in the overall shopper numbers and certainly in the counts on the entry points to the shopping centre.
 - c) Opening of TK Maxx in Two Rivers in place of Staples may have contributed to the increase in shoppers crossing the Footbridge over River Colne in 2005. In addition Debenhams had a special promotion starting Wednesday which could have in part contributed to the higher counts on Wednesday especially near the western end of the High Street.
 - d) The change over from Pay and Display to Pay on Exit parking at the Elmsleigh Centre Surface and Multi-storey Car Parks may have influenced shopping habits. It means shoppers do not have to return to their cars by a specific time. Shoppers may therefore be inclined to stay in the Town Centre for longer increasing their movements around Staines as a result.

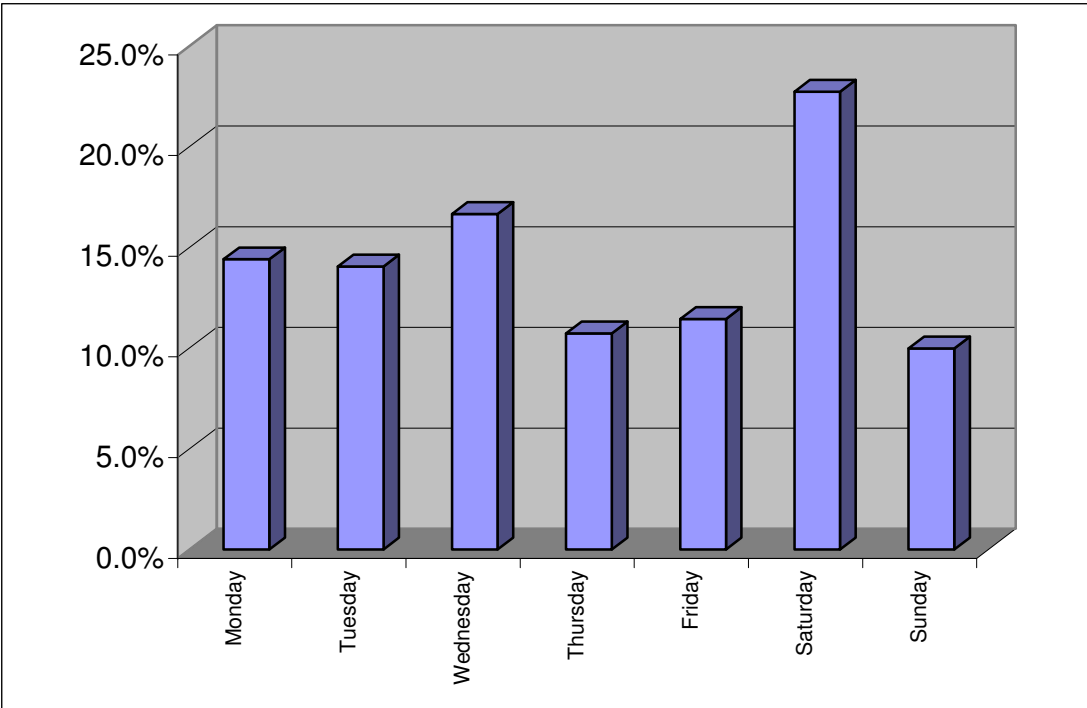
- e) The disruption caused by the refurbishment of Elmsleigh Centre and the high rates of vacancy (15%) within the shopping centre at that time has clearly had an impact on the pedestrian counts on the core High Street shopping area in 2004 as indicated in Tables 1 and 2.
- f) Kwik Save and its predecessor Somerfield were large supermarkets located at the southern end of the main mall of the Elmsleigh Centre adjacent to the centre's entrance from the Bus Station. They functioned as an 'anchor' to this part of the Elmsleigh Centre as a whole. At the time of the 2003 survey, the unit was empty, although being fitted out for Matalan – a clothing retailer. The loss of an occupier may have reduced pedestrian movement to this part of the centre as a whole for the period the unit was vacant. It may in part explain the drop in pedestrian movement at the Bus Station entrance from 22,068 in 2002 to 20,472 in 2003. With the opening of Matalan in 2004 the figure went up to 21,384 and 22,404 in 2005.
- g) Works in Clarence Street between 2001 and 2003 had a significant impact on traffic movement to and over Staines Bridge. This may have had an adverse impact on the perceived ease of accessing the town centre from the west.
- h) The Memorial Gardens/Market Square enhancement involved the reduction of parking provision at the Riverside Car Park from some 300 spaces to just under 100 spaces. This has reduced the role of the car park as a shopper car park. In 2005 Pedestrian movement in Thames Street for the total of three days is 30.6% less than in 1998 and may be attributed to the reduced size of the car park. This may have also had an effect on the western end of the High Street as discussed under paragraph 3.14.
- i) The creation of the two-way traffic schemes on Thames Street and South Street was undertaken in a phased way to enable a reasonably free flow of traffic throughout the construction phase. The opening of Mustard Mill Road and access to car parks in Two Rivers, providing now nearly some 1,000 car parking spaces, has clearly provided a new access point to the town centre and parking location. This has clearly had a significant influence on shopper movements.
- j) The pedestrianisation of the High Street, which was enabled by the above road schemes, has created a much safer, quieter and more pleasant shopping environment. The enhancement of the High Street has made it much more attractive. There is little evidence that the enhancement works significantly altered pedestrian flows in 2002 when the work was undertaken.
- k) Relocation of the market has reduced pedestrian movement in Clarence Street in the vicinity of Market Square, and it may be assumed this has accordingly consolidated the High Street's shopping role.
- l) The Two Rivers and Tilly's Lane schemes had little adverse impact on the town during the construction phases, but have clearly attracted more people to the town. The survey results at Norris Road and Tilly's Lane show high levels of movement and therefore confirm the integration of the schemes into the town as a whole.

- 4.5 Overall, there has been a significant growth in the number of pedestrians counted on all three days for the town centre as a whole of some 43.3% as compared with 1998. This undeniably underestimates the real growth in shoppers, given the lack of data on the shoppers arriving at the Two Rivers car park, shopping, and leaving without passing a survey point.
- 4.6 Norris Road has emerged as a major pedestrian route within the core shopping area of the town centre, with flows now in excess of 24,000 on a Saturday, and within a very similar order of magnitude to flows at the Elmsleigh Centre's High Street entrance. The map at Appendix 1 shows a higher concentration of pedestrian flows in the vicinity of the High Street. The map also shows the change since 1998.
- 4.7 Pedestrian flows in the High Street have remained high in absolute terms.
- 4.8 The survey results for both Norris Road and Tilly's Lane as a sum total of all three days, show high pedestrian flows in excess of 70,000 in 2006 – a sharp increase from 38,760 in 2000 when flow was only through Norris Road. The high flows suggest that the new shopping area is not only successful, but that the intention to ensure it functioned as an integrated part of the town centre as a whole has been achieved.
- 4.9 The creation of the new shopping area has created several new entry points to the town centre shopping area as a whole, some of which are covered in the survey. This has inevitably reduced the concentration of movement at previous 'entry' points to the core of the shopping area at either end of the High Street, although this is substantially compensated by the growth in shopper numbers to the town as a whole.
- 4.10 The new shopping area has also created an increased parking provision and also a changed disposition of provision. Previously, there were no car parks on the north side of the High Street. Their introduction now provides a range of car park facilities surrounding the core shopping area, resulting in different patterns of movement as shoppers begin and end their trips at a greater range of points.
- 4.11 The new centre has clearly resulted in Norris Road and the Elmsleigh Centre High Street entrances becoming a very strong north south axis linking both sides of the High Street. The Elmsleigh Centre has held its position well within the shopping area as a whole with combined flows on Saturday being some 30,000 in 1998 at the Bus Station and High Street entrances, and 40,164 in 2006.

5. Future Surveys

- 5.1 The program of annual pedestrian surveys in May of each year will be continued as part of the monitoring of the vitality and viability of Staines as a shopping centre.
- 5.2 Future surveys will be carried out on Tuesday, Wednesday and Saturday as in previous years. As indicated in the chart below the 2004 survey reveals that Saturday continues to be the busiest day, followed by the market day Wednesday. Although as per the 2004 survey Tuesday is not a day with the lowest pedestrian movement, it would continue to be surveyed in the future to maintain consistency for analysing data collected since 1998.
- 5.3 Sunday could be emerging as a stronger trading day and could be attracting more shoppers who used to shop on Saturday. It may be worth monitoring this in the future as the count of pedestrians over the weekend as a total could well be increasing.

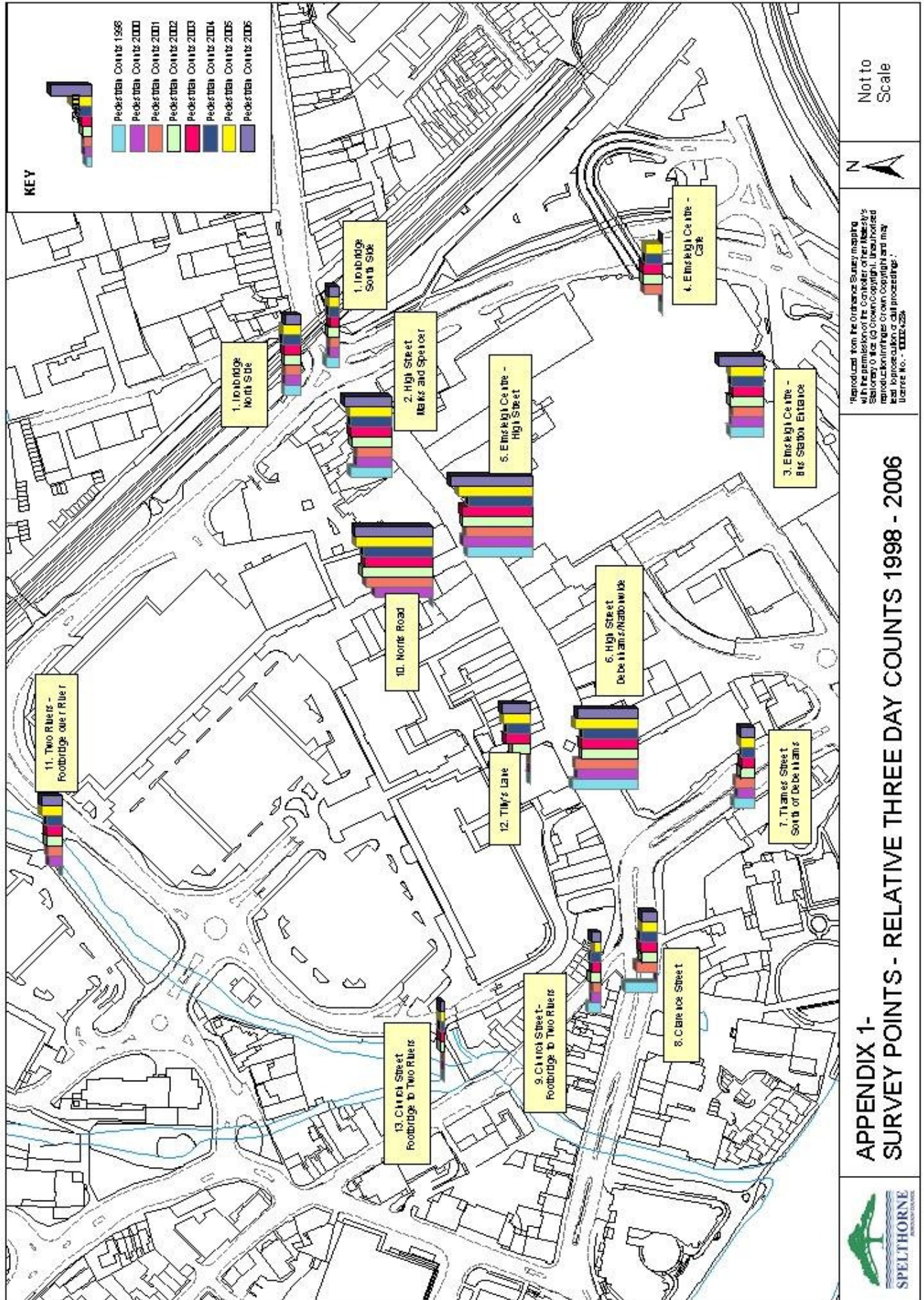
Figure 19 Percentage of pedestrian counts through the week – 2004 survey data



Note: Sunday is a shorter trading day of 6 hours

Appendix 1

Appendix 1: Map showing Survey Points – Relative three day counts 1998 - 2006



Appendix 2

Appendix 2: Table A2(1a) – Summary results for each survey day 1998 – 2002 at each survey point.

Survey Point	Location	Sat	Tue	Wed	Wed*	Sat	Tue	Wed	Sat	Tue	Wed	Sat	Tue	Wed
1	Ironbridge Both Sides	30-5-98 7644	19-5-98 5652	20-5-98 5388	10-6-99 4848	20-5-00 6468	23-5-00 4308	24-5-00 5292	19-5-01 5220	22-5-01 5496	23-5-01 5544	25-5-02 6444	21-5-02 5316	22-5-02 5904
2	High Street-Marks & Spencer/Granada	11856	8280	7824	6384	9648	6180	7200	7704	7380	8004	10164	8376	8532
3	Elmsleigh Centre-Bus Station entrance	9504	5976	6888	4560	9600	5508	6084	8280	6132	5916	9624	5592	6852
4	Elmsleigh Centre-Cafe entrance								6912	2376	2748	5808	3240	4212
5	Elmsleigh Centre-High Street entrance	20508	10776	12828	10644	21408	11640	13380	20772	11208	12948	22920	11484	12648
6	High Street-Debenhams/Nationwide (east)	21252	11508	12204	10716	18468	8052	14568	19308	10464	12696	16020	10848	11304
7	Thames Street-south of Debenhams	6732	3312	3876	4260	5472	2244	3360	5532	3396	3720	3840	2400	3120
8	Clarence Street - outside Blue Anchor P.H. - both sides of road	10392	3900	7752					4608	4272	5004	4452	3252	2700
9	Church Street-west of The George P.H.	3384	2760	2352	1764	2628	1428	1752	1860	1764	1560	2676	2424	2388
10	Norris Road south end				7332	19392	8460	10908	20268	11904	12972	22992	11580	12876
11	Two Rivers-footbridge over River Colne					5664	1344	1524	5664	2040	1692	5568	1992	2688
12	Tilly's Lane											5856	3012	3372
13	Church Street - Footbridge to Two Rivers											1116	816	792
	Total Count for each day	91272	52164	59112	50508	98748	49164	64068	106128	66432	72804	117480	70332	77388
	Total hourly counts for each year	202548				50508		211980		245364		265200		

* Note : In 1999 the deviation in trend is due to a single survey undertaken in October, an exception to the usual three day survey in May.

Appendix 2 - Table A2(1b) – Summary results for each survey day 2002 – 2006 at each survey point.

Survey Point	Location	Sat	Tue	Wed	Sat	Tue	Wed	Sat	Tue	Wed	Sat	Tue	Wed
1	Ironbridge Both Sides	10-5-03 5664	20-5-03 5064	21-5-03 6480	15-5-04 5400	18-5-04 6468	19-5-04 6888	14-5-05 6012	17-5-05 5556	18-5-05 6528	20-5-06 5652	23-5-06 5520	24-5-06 6312
2	High Street-Marks & Spencer/Granada	11268	7020	8988	9948	8652	9288	10788	8004	9864	12216	8640	11004
3	Elmsleigh Centre-Bus Station entrance	8004	5724	6744	9264	5880	6240	10188	5916	6300	13788	6936	9240
4	Elmsleigh Centre-Cafe entrance	6000	3072	3708	4764	3060	3396	5160	2316	3636	0	0	0
5	Elmsleigh Centre-High Street entrance	22932	11304	13032	20076	10356	12924	23628	11808	14808	26376	12180	16836
6	High Street-Debenhams/Nationwide (east)	17748	8748	11808	15684	10104	11784	16800	10308	15804	16944	9288	15024
7	Thames Street-south of Debenhams	3732	2544	2472	3000	2580	2844	3636	3024	3000	2880	2424	4188
8	Clarence Street - outside Blue Anchor P.H. - both sides of road	4320	3312	3888	3828	3876	3828	3924	3180	3456	4224	3048	3408
9	Church Street-west of The George P.H.	2760	1428	1704	2640	1956	2136	2148	1188	1572	2556	1752	1764
10	Norris Road south end	22680	10572	12468	19980	12360	14352	23172	13308	15480	24660	12732	14772
11	Two Rivers-footbridge over River Colne	5616	2064	2376	5328	2232	2844	7164	2844	3600	7176	2760	3768
12	Tilly's Lane	7908	3744	4488	7020	3504	4956	7740	4308	6264	8352	4596	6360
13	Church Street - Footbridge to Two Rivers	1068	804	708	1224	996	852	1116	792	876	1008	900	960
	Total Count for each day	119700	65400	78864	108156	72024	82332	121476	72552	91188	125832	70776	93636
	Total hourly counts for each year	263964		262512		285216		290244					

Appendix 2: Table A2(2) - Total number of pedestrians per day on all three survey days

		May-98	Oct - 99*	May-00	May-01	May-02	May-03	May-04	May-05	May 06
1	Ironbridge (both sides)	18684	4848	16068	16260	17664	17208	18756	18096	17484
2	High Street-Marks & Spencer/Granada	27960	6384	23028	23088	27072	27276	27888	28656	31860
3	Elmsleigh Centre-Bus Station entrance	22368	4560	21192	20328	22068	20472	21384	22404	29964
4	Elmsleigh Centre-Cafe entrance				12036	13260	12780	11220	11112	0
5	Elmsleigh Centre-High Street entrance	44112	10644	46428	44928	47052	47268	43356	50244	55392
6	High Street-Debenhams/Nationwide (east)	44964	10716	41088	42468	38172	38304	37572	42912	41256
7	Thames Street-south of Debenhams	13920	4260	11076	12648	9360	8748	8424	9660	9492
8	Clarence Street - outside The Boundary P.H. (Previously the Blue Anchor P.H.) - both sides of road	22044			13884	10404	11520	11532	10560	10680
9	Church Street-west of The George P.H.	8496	1764	5808	5184	7488	5892	6732	4908	6072
10	Norris Road south end		7332	38760	45144	47448	45720	46692	51960	52164
11	Two Rivers-footbridge over River Colne			8532	9396	10248	10056	10404	13608	13704
12	Tilly's Lane					12240	16140	15480	18312	19308
13	Church Street - Footbridge to Two Rivers					2724	2580	3072	2784	2868

Appendix 3

Appendix 3: Table A3 and – Comparison of 2005 and 2006 counts.

Survey Point	Location	Sat 20-05-06	Tue 23-05-06	Wed 24-05-06	Total for 2006	Sat 14-05-05	Tue 17-05-05	Wed 18-05-05	Total for 2005	Total for 1998
2	High Street-Marks & Spencer/Rosebys	12216	8640	11004	31860	10788	8004	9864	28656	27960
5	Elmsleigh Centre-High Street entrance	26376	12180	16836	55392	23628	11808	14808	50244	44112
6	High Street-Debenhams/Nationwide (east)	16994	9288	15024	41306	16800	10308	15804	42912	44964
12	Tilly's Lane	8352	4596	6360	19308	23172	13308	15480	51960	
10	Norris Road	24660	12732	14772	52164	7740	4308	6264	18312	
					200030			Total	192084	117036

Appendix 4

Appendix 4: Construction work, improvements and other factors likely to affect pedestrian movements or number of shoppers 1998 – 2006

No.	Construction Work	Started	Opened/Work Complete
1	Refurbishment of Elmsleigh Centre Phase II – Reconfiguration of BHS and adjoining plus small extension.	November 2005	January 2007 (approx)
2	Conversion of Elmsleigh Surface and Multi-Storey Car Parks from Pay & Display to Pay on Exit	-	April 2004
3	Refurbishment of Elmsleigh Centre High Street Entrance	July 2003	November 2004
4	Refurbishment of Tothill Multi-storey and Elmsleigh Surface Car Park	April 2004	November 2004
5	Clarence Street-Bridge strengthening and construction work on former cinema site	Spring 2001	July 2003
6	Closure of Kwik Save at south end of Elmsleigh Centre and opening of Matalan	Late 2002	May 2003
7	Memorial Gardens/Market Square enhancement and reduction in size of Riverside Car Park	October 2001	September 2002
8	Enhancement work on High Street	January 2002	September 2002
9	Opening of Tilly's Lane/Multiplex Cinema	Spring 2000	March 2002
10	Relocation of Market from Market Square to the High Street	-	October 1999
11	Removal of traffic from High Street	-	October 1999
12	Construction work associated with two-way traffic scheme on Thames Street and South Street	November 1998	October 1999
13	Opening of the Two Rivers Shopping Centre	June 1997	October 1999