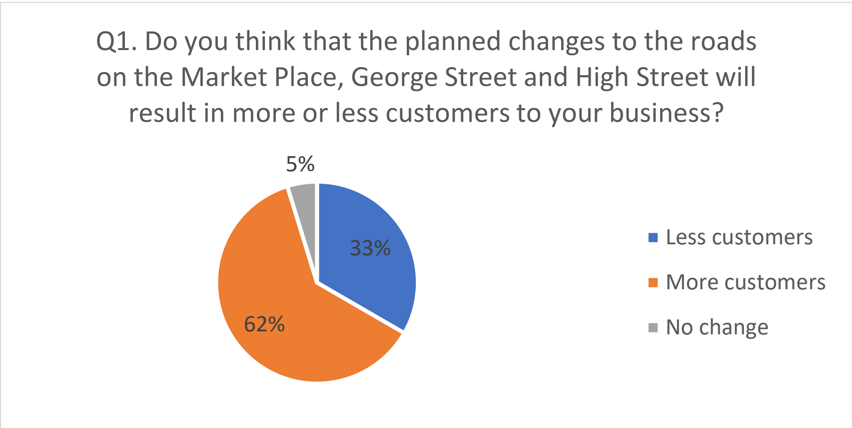
St. Albans: High Street Business Survey Analysis

Topline statement: The High Street Recovery trials have failed to gain the support of businesses in St Albans and initial expectations that some businesses may have held for the trials have not been met. The trials have not proved popular in their current format with St Albans businesses and have even led to some disappointment of some George Street traders who had higher expectations of the scheme. The perceived lack of activation of space created by the closure of the roads to traffic is a key concern. As a preference, the largest proportion of responding businesses would like to see George Street closed to traffic at weekends (Saturday and Sunday only) and High Street only closed for special events. A sizable proportion though want all streets reopened except for special events.

1. Pre-Trial Business Survey

1.1. An initial business survey was carried out in June 2022, prior to the implementation of the scheme. This was targeted only at the trial area and received 21 responses. This was a simple three question survey.

1.2. Anticipation of the trials was mostly positive. 62% of respondents thought the trials would attract more customers and increase profitability, and 57% thought the trials would have a long-term positive impact on their business (Chart 1).



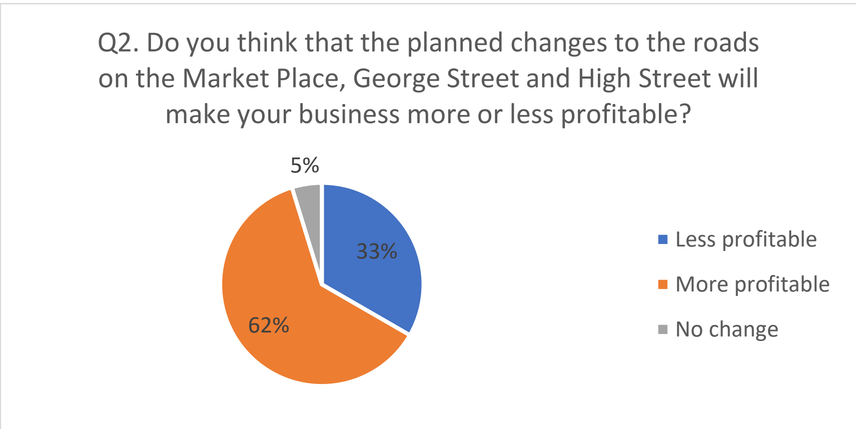


Chart 1 – Result of the pre-trial business survey

2. Follow Up Business Survey

2.1. A follow-up business survey was carried out in July 2023, where businesses could reflect on the trials after eight months of operation. The survey was distributed to a wider geographical area of St Albans so that other businesses could give feedback on impacts of the trials outside of the immediate scheme areas. Survey questions were also more in depth.

2.2. Seven businesses responded to both surveys with views listed in the ensuing paragraphs.

2.3. George Street Canteen changed their view. Last year the business hoped that the trials would have “no change” to their long-term business and would attract more customers and be more profitable. In responding this year, the business thought that the trials had had a negative impact on their business, a reduction in customers and a decrease in turnover.

2.4. MUST Wine Bar also changed their view. Last year the business hoped that the trials would have a positive impact to their long-term business and would attract more customers and be more profitable. In responding this year, the business thought that the trials had had neither positive or negative change to their business, a reduction in customers and a no change to turnover.

2.5. Galio Jewellers and Atelier Ferrari Monti did not change their views: both feeling the trials have had a positive impact on their business, had attracted more customers and increased turnover.

2.6. Little Marrakech Restaurant, L.A James and the Dressing Room did not change their views from the previous survey: feeling the trials have had a negative impact on their business, had attracted less customers and decreased turnover.

2.7. Chart 2 shows that in 2023, business sentiment towards the trial is predominantly negative. Only 12% of businesses framed the trial positively in terms of impact on their business. 71% of respondents felt the trial had had a negative impact on their business.

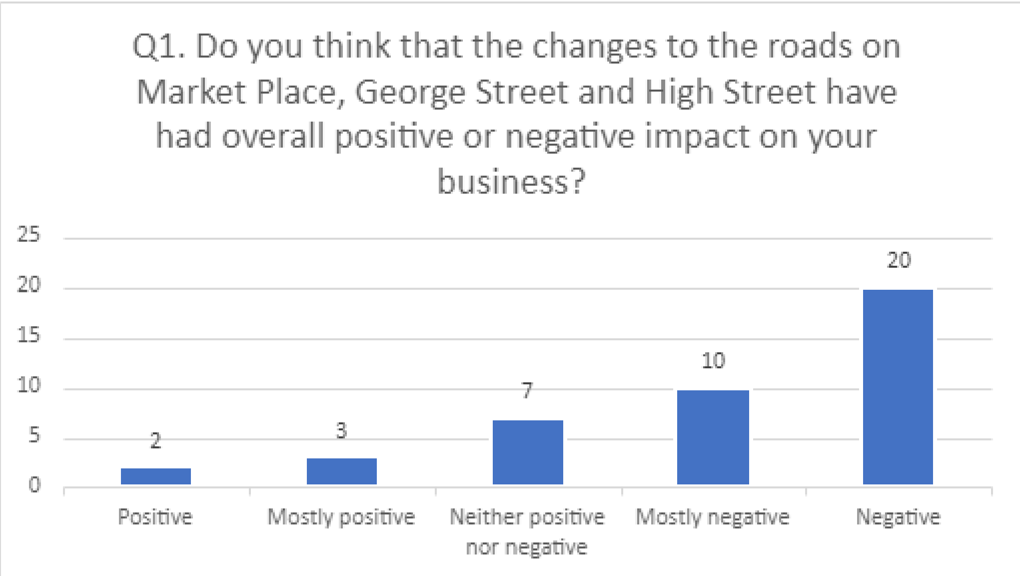


Chart 2 – Business sentiment towards the trial in 2023

2.8. 72.5% of respondents felt the trials had resulted in less customers visiting (Chart 3). 12.5% felt there had been more customers.

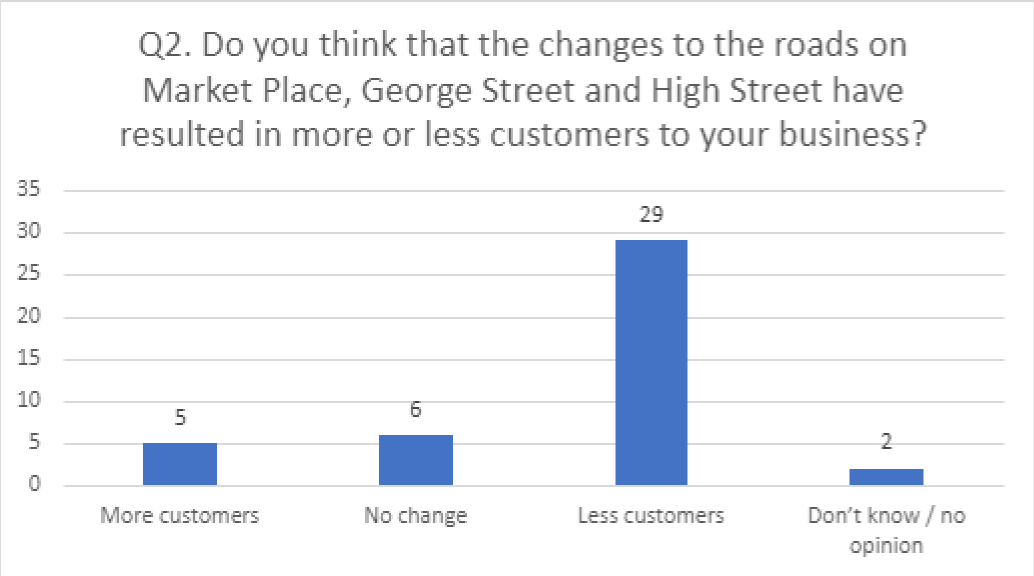


Chart 3 – Anticipated impact of number of customers due to the trial

2.9. 67.5% think the trials have negatively impacted their business turnover. 10% think they have helped increase turnover (Chart 4).

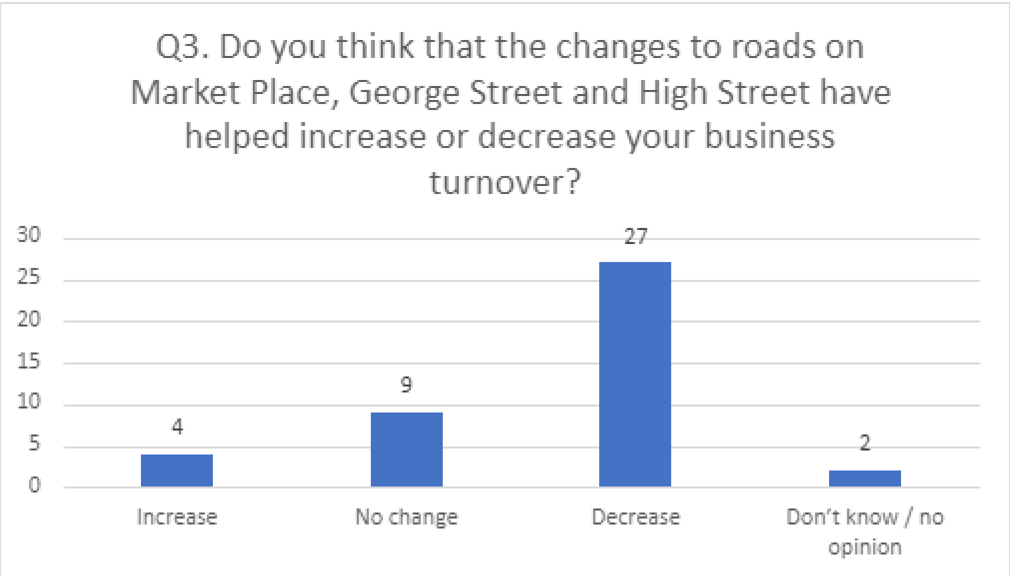


Chart 4 – Anticipated business turnover due to the trial

2.10. 69% of respondents think footfall has not increased in the past year and 15% think it has increased (Chart 5). HUQ data indicates footfall has increased in the last year in St Albans.

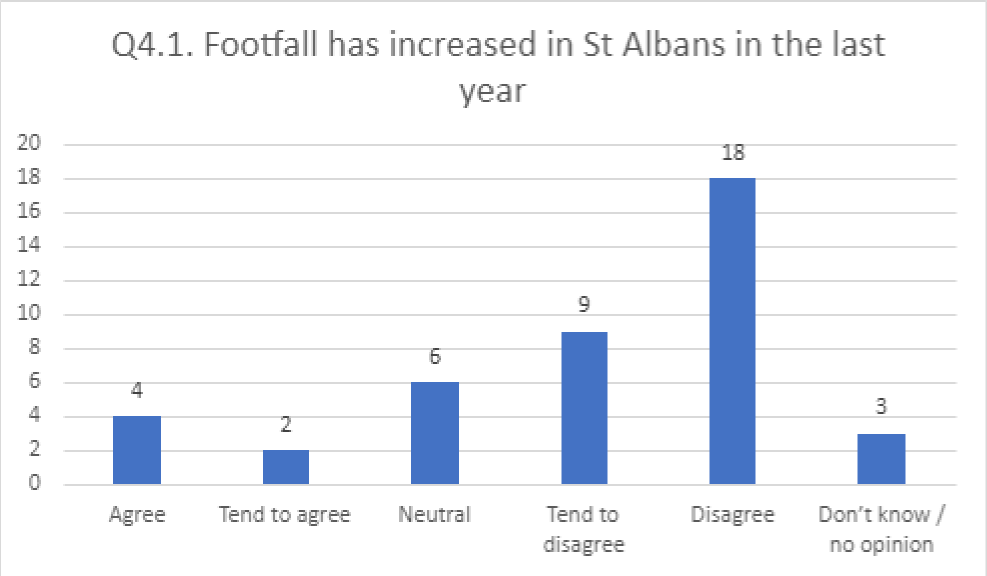


Chart 5 – Anticipated footfall due to the trial

2.11. 68% of respondents do not think people are spending more time in St Albans and 11% think people are spending more time in St Albans (Chart 6). HUQ data indicates dwell times have been stable in St Albans in the last year.

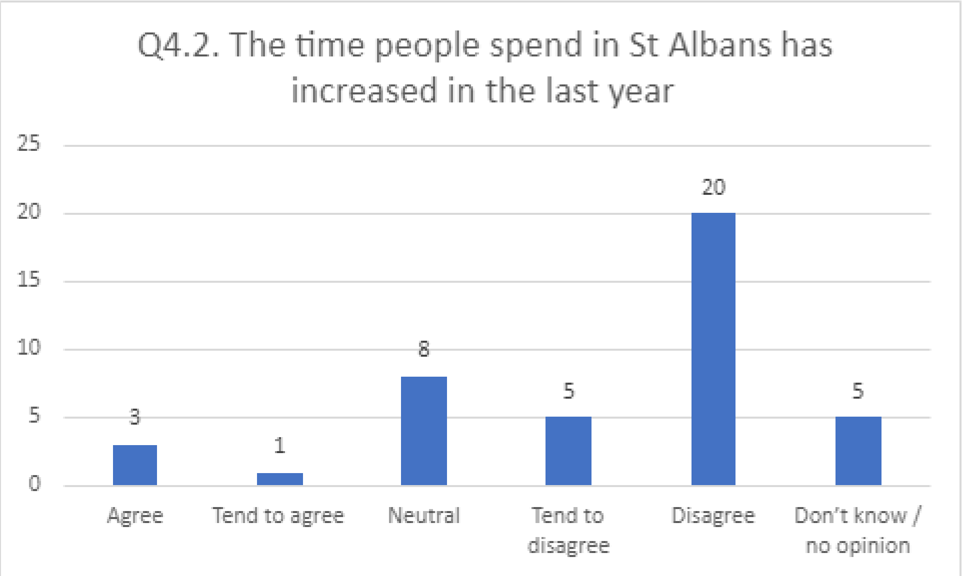


Chart 6 – Anticipated business turnover due to the trial

2.12. Chart 7 shows the majority of respondents (81%) disagree that people are spending more money in St Albans in comparison with last year (9.5% agree with this statement). This should be considered in light of cost of living and inflationary increases, which the original survey predates and may have impacted expectations at that time and led responses this time.

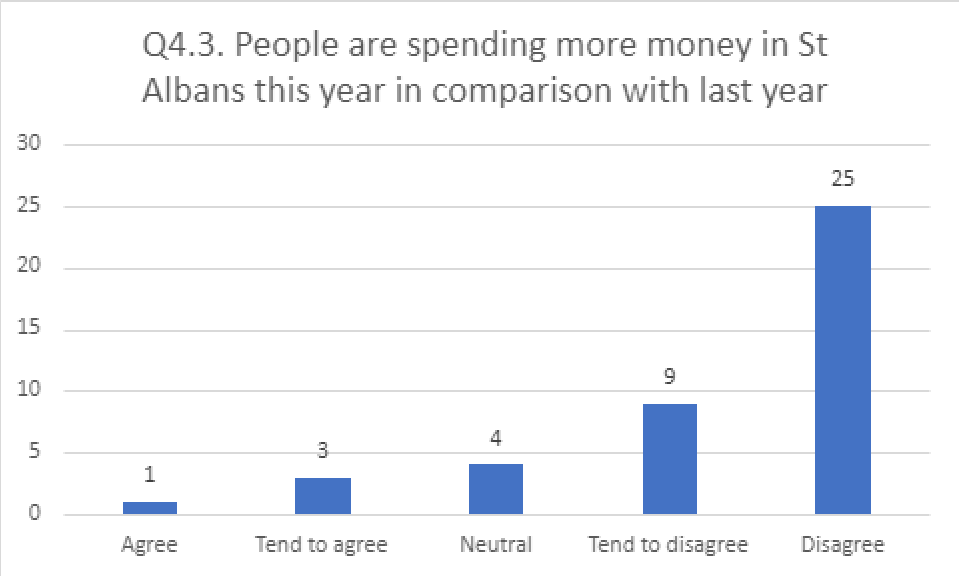


Chart 7 – Anticipated money spent by people due to the trial

2.13. 64% of responding businesses disagree and 26% agree with the statement that visitors benefit from traffic free spaces when shopping or accessing services (Chart 8).

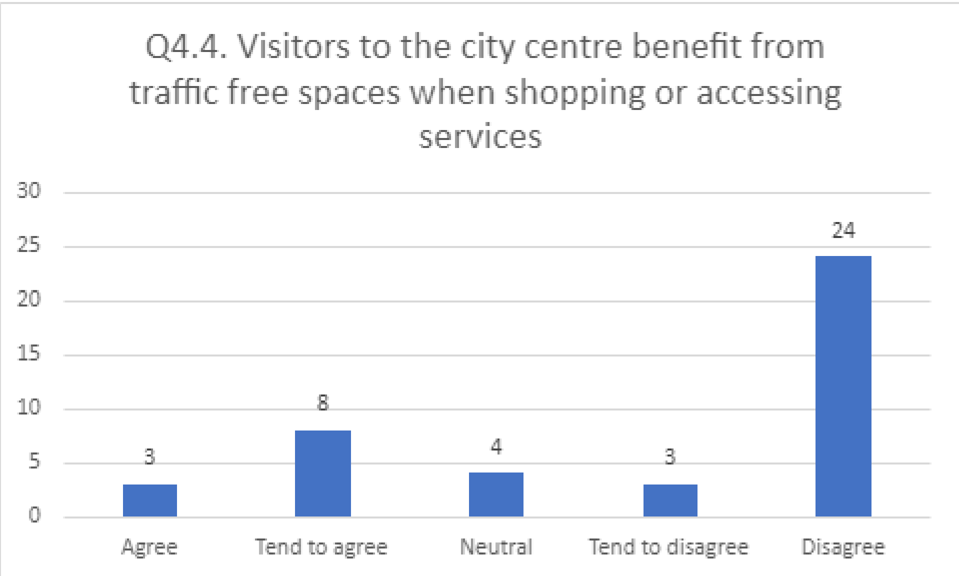


Chart 8 – Results on visitors benefit from traffic free spaces

2.14. 85.5% of respondents do not feel traffic-free space is being used positively to benefit the local economy (Chart 9). Only two respondents (4.5%) agreed with the statement.

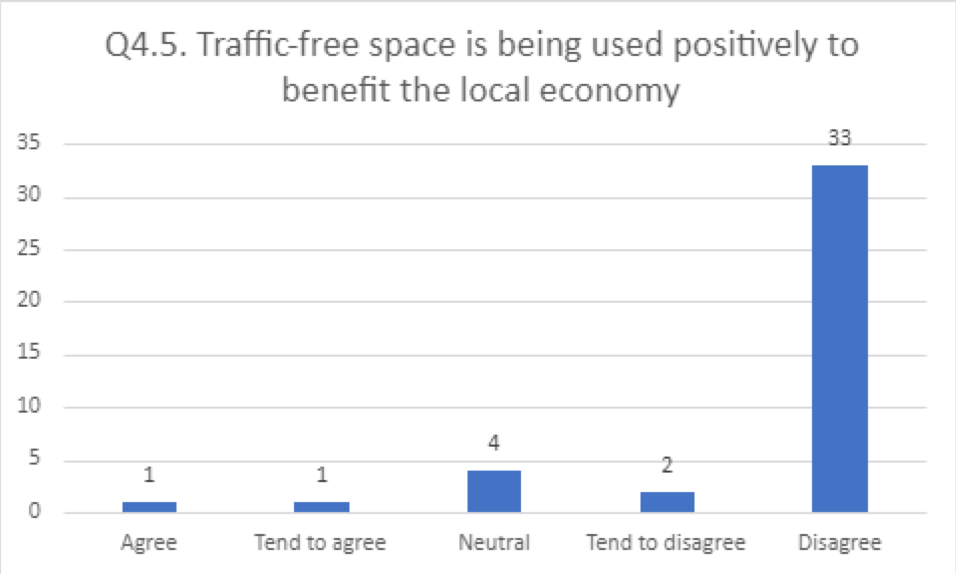


Chart 9 – Perception on utilization of traffic-free space due to the trial

2.15. Business respondents were asked to express a preference of what option they would prefer for gated (closed to traffic) hours for High Street and George Street (Chart 10a). Only 7% wanted the situation to remain as it is. Including these 7%, 19% would want an all-week closure of George Street. While 37% would like the gates closed only for special events along High Street and George Street, the largest proportion (44%) would like to see George Street closed to traffic at weekends. Of those that expressed this preference, 72% would prefer it if the days were just Saturday and Sunday (and not Friday night) (Chart 10b).

Chart 10a – Preference on road closure for High Street and George Street

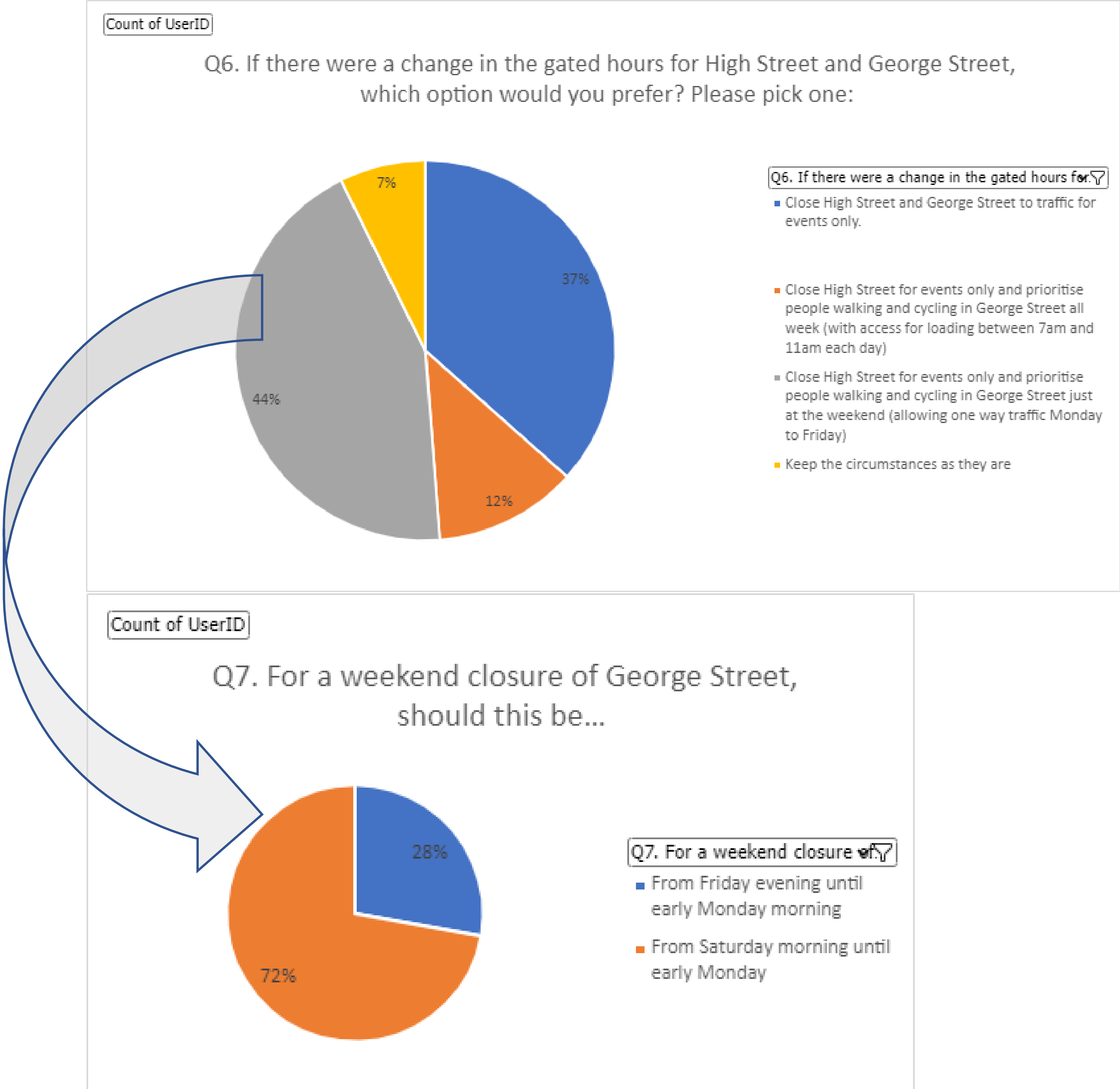


Chart 10b – Preference on road closure for George Street

2.16. Other comments included enhancing disabled parking, negative comments on the business impacts of the trials, rents/rates, reinvigorating the market, variety (or lack) of shops, park & ride, weight limits, too many gates and signs causing confusion, car park signage, and EV charge points.

3. St Albans BID: George Street Traders Survey

3.1. St Albans BID carried out a survey to quickly assess the views of George Street businesses. 12 businesses favoured the road being closed to traffic and 15 business wanted it open. Some preferred a hybrid seasonal approach. Many of the respondents who wanted the street open favoured a one-way system.

4. Commentary & Conclusions

4.1. The High Street Recovery trials have failed to gain the support of businesses in St Albans and initial expectations that some businesses may have held for the trials have not been met. The trials have not proved popular in their current format with St Albans businesses and have even led to some disappointment of some George Street traders who had higher expectations of the scheme. There are a number of reasons for this, including the lack of activation of space (in comparison with when the streets were closed to aid social distancing during Covid). It is telling that respondents positive of the scheme's impact are clothes and jewellery retailers. The expectations of the hospitality venues have been dashed by delays in outdoor licensing arrangement and limitations to the space allowed due to the requirements of allowing a channel for emergency vehicles. Opportunities to make more use of the space in High Street have not been taken up by St Albans City & District Council and St Albans BID. SADC argue that they have tried to 'sell' the space but the pavement space along St Peter's Street is more popular with potential street vendors and has better facilities (for example electrical supply). St Albans BID note that (unlike during the pandemic) they no longer have the ranger resources to support regular activation of the space and event delivery is financially unsustainable, adding that there is a clear difference between the opportunities of the semi-permanent Pandemic closure with the more recent trials.

4.2. George Street traders are split on whether the street should be closed or open to traffic.

4.3. Other respondents outside the scheme have noted some impacts. One trader along Verulam Road says they now close on Saturday afternoon as business has got so bad. This is a section of road that is still open.

4.4. The cost of living crisis is clearly another factor. One possibility to consider is that businesses are blaming something happening locally (and on something that they potentially have some influence over) on the impacts of trading caused by something much more universal. At the least, the sense that the trials are not helping under difficult circumstances does pervade.

4.5. Footfall and dwell time data does show continued improvement over the last year. Our experiences in Rickmansworth demonstrate that even when this is articulated to businesses, they don't seem to believe it. Businesses responding to the survey in St Albans in the majority do not believe footfall or dwell time has increased. We are currently investigating whether it is possible to buy and assess Visa/Mastercard transaction data for St Albans to see how this has changed historically and over the course of the trial. At the very least, in the longer term we can assess selected anonymised businesses to see whether their turnover and profits were impacted by viewing filings at Companies House.

4.6. Another consideration is that St Albans is seen more as a shopping destination (this was the most common reason for visiting St Albans in the public survey) and has not developed to the same degree a "café culture" feel as in more successful High Street Recovery trial areas such as Hitchin and Hertford. Comparisons are tricky because St Albans is a larger centre; towns of smaller scale may have found it easier to adapt and change, and it might just be that they are places of different types and all fulfil different needs equally successfully though in different ways, but need different things from a transport or travel perspective. The perception remains that if people are coming for shopping, they may take home heavy items and a car is then required – this perception is shared by businesses and respondents to the public survey who most often use a car to visit St Albans. There is no evidence that people need a car to be able to spend money – indeed there is some evidence that people taking public transport, walking and cycling spend more time and more money when visiting town centres (partly because they don't have to rush back to cars when parking times expire). Ref: https://content.tfl.gov.uk/street-appeal.pdf and https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/509587/value-of-cycling.pdf

4.7. As a preference, the largest proportion of responding businesses would like to see George Street closed to traffic at weekends (Saturday and Sunday only) and High Street only closed for special events. A sizable proportion though want all streets reopened except for special events.