

Economic Impact Assessment of the Cycle Enfield Scheme on A105 Centres

Damian Walne and Stuart Younger
Regeneris Consulting



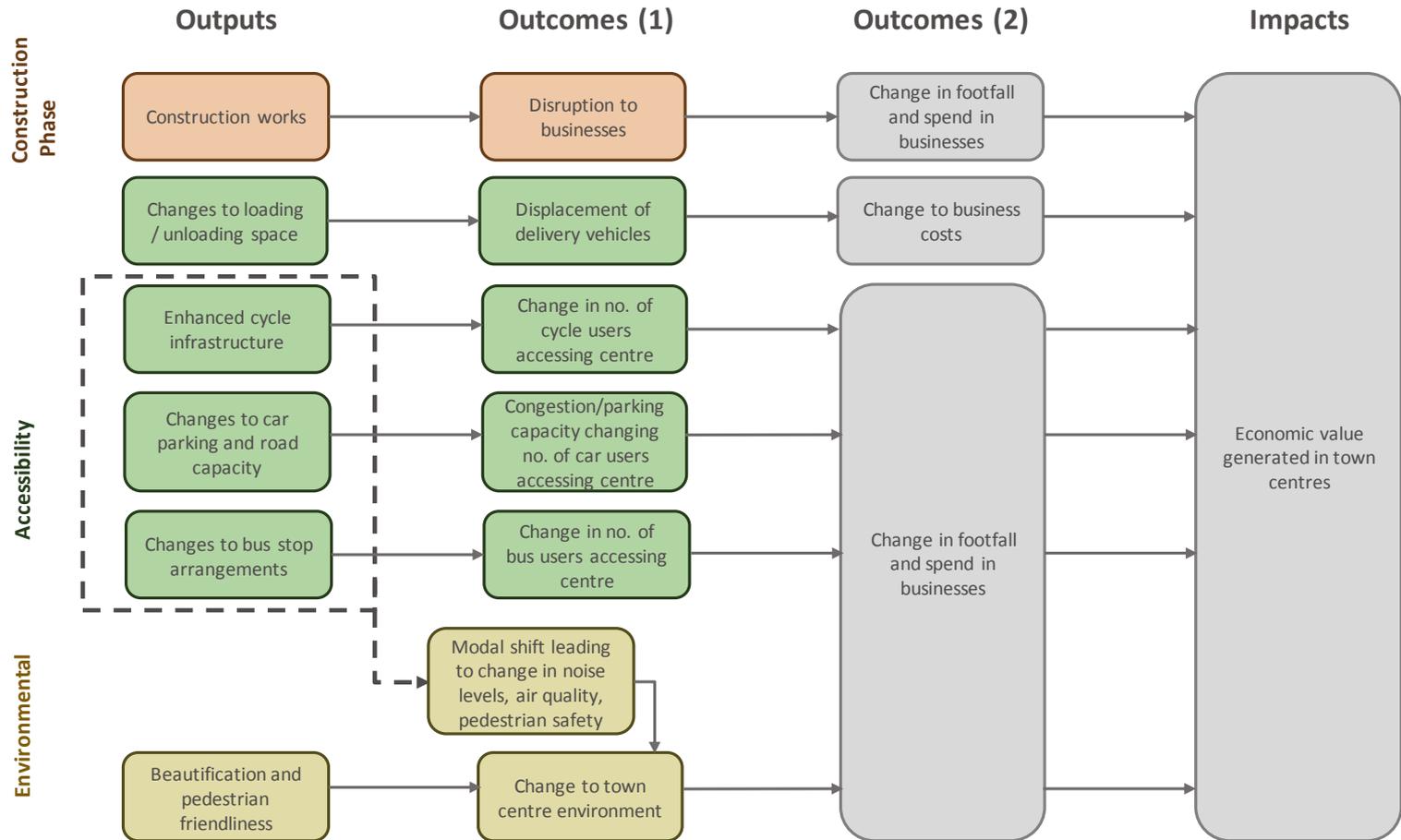
Context for the study

- The goals of Cycle Enfield
 - Encourage more cycling, more safely, more often
 - Provide better streets & places, for people not cars
 - Town centre vitality is a high priority

- Assessing impact on town centre economic vitality:
 - Total visitor spend: Annual turnover of local businesses
 - Proportion of spend from each transport user
 - How change in transport use affects visitor spend

- Explaining our approach
 1. Developing a logical framework
 2. Estimating a baseline
 3. Establishing a model
 4. Using realistic assumptions
 5. Testing scenarios
- Our study has involved:
 - Reviewing design plans, consultations, and site visits.
 - Reviewing data, evidence, and drawing on case studies.
 - A transparent economic model to estimate impacts.
- So far assessed 3 centres
 - Palmers Green
 - Winchmore Hill Broadway
 - Winchmore Hill Green Dragon

1. Developing a logical framework



- Main indicator: total annual turnover across the centre

2. Estimating a Baseline

- What we want to know: likely change in revenues of town centres businesses
- What we don't know: existing (baseline) revenues
- Estimate by bring together what we do know
 - Town centre survey data on share of visitors by how much they spend and mode of travel
 - Estates Gazette data on businesses and jobs in shops and local services
 - ONS data on turnover per employee
- Plausible estimates for each town centre:

	Palmers Green		Winchmore Hill Broadway		Winchmore Hill Green Dragon	
	Value	%	Value	%	Value	%
Car	£22.7m	35%	£4.2m	45%	£2.6m	45%
Bus	£19.0m	29%	£1.9m	21%	£1.2m	21%
Rail	£3.7m	6%	£0.0m	0%	£0.0m	0%
Cycle	£0.8m	1%	£0.1m	1%	£0.1m	1%
Walk	£18.5m	29%	£3.0m	33%	£1.9m	33%
Other	£0.1m	0%	£0.0m	0%	£0.0m	0%
Total	£64.9m	100%	£9.3m	100%	£5.7m	100%

3. Establishing a model

Baseline – Existing Situation “Without”
Cycle Enfield investment

- Current number of trips
- Current modes of transport
- Current spending patterns by mode
- Current business turnover



Alternative – Scenarios “With” Cycle
Enfield Investment

- Changes in numbers of trips by modes of transport
- Current spending patterns by mode
- Changes in business turnover



Transition phase – Scenarios
of construction

- Changes in trips & modes
- Current spending patterns
- Changes in turnover

Public realm – Scenarios of
more attractive centres

- Changes in trips & modes
- Current spending patterns
- Changes in turnover

- Key point - approach is policy off/on.
- That is world “without” Cycle Enfield and a world(s) “with” Cycle Enfield.
- Everything else held constant and so isolate effects on investment.
- Not a forecast.
 - No historic data to build forecast from.
 - Many other variables shaping future – falling fuel prices, growing local population, increased on-line shopping, weather etc.

4. Using realistic assumptions

- Challenges of data availability, early design stage, lack of UK precedents to draw from.
- Use cautious realistic assumptions about behaviour change among town centre visitors and draw from evidence.

Factor	Evidence
Construct-ion	Inputs from design team and transport engineers. Impacts from similar schemes elsewhere. Analysis of competitor retail and service centres.
Cycle Users	Design plans and infrastructure enhancement. Visitor survey evidence on attitudes to cycling. Journey lengths to town centre. Levels of cycling in other benchmark areas.
Car Users	Design plans. Impacts on road capacity and parking. Modelling of stopping times throughout centres. Locations of parking bays and single yellow lines. Visitor survey data on where town centre users park. Issues raised in consultation responses.

Bus Users	Design plans and impacts on road capacity and stops. Modelling of stopping times throughout centres. Perspectives from public consultation and TfL.
Loading / Unloading	Design plans and impacts on number and location of loading bays. Issues raised in consultation responses.
Town Centre	Design plans and impacts on town centre environment. Case study evidence from relevant schemes. Perspectives from public consultation.

5. Testing scenarios

- Use **three scenarios** for each assessment
 - Base, Better and Worse case
- Test decreases in car trips
- Test increases in cycle trips (from current low base)
- Test for increases and decreases in public transport trips.
- Present impacts from “major positive” to “major negative”.
 - Evidence that London Retail Sector on average has 8% profit margins. So loss of over 7% turnover would be a major negative impact.

Assessment	Impact on Total Town Centre Business Turnover
Major Positive	Over 7% Increase in total town centre business turnover
Medium Positive	3-7% Increase in total town centre business turnover
Minor Positive	1-3% Increase in total town centre business turnover
Neutral / Negligible	+/- 1% of total town centre business turnover
Minor Negative	1-3% Reduction in total town centre business turnover
Medium Negative	3-7% Reduction in total town centre business turnover
Major Negative	Over 7% Reduction in total town centre business turnover

- Results for Palmers Green and Winchmore Hill centres.

Effects in Palmers Green

Construction Phase	<ul style="list-style-type: none"> • Temporary congestion/parking impact over c.12 weeks • Access to businesses maintained • c.50% of visitors by car/bus are on non-discretionary trips, so unlikely to change destination.
Cycle Users	<ul style="list-style-type: none"> • Enhanced cycling connectivity attracting more cyclists to the centre • Most displaced from another form of transport
Car Users	<ul style="list-style-type: none"> • Changes to roads/junctions and additional buses stopping leading to extra delay of 40-50 seconds at AM & PM peaks • Overall increase in parking, but some moved from on-street to off-street • Loss of single yellow line parking, but Lodge Drive will open later • Many drivers are on non-discretionary trips, so unlikely to change destination • Lodge Drive to Fox Lane is around four minutes' walk • Overall, limited impact expected, but North end of centre more likely to be affected.
Bus Users	<ul style="list-style-type: none"> • Limited impact anticipated - minor changes to bus stop locations; junction delays only expected to lead to extra 15-25 second delays in AM & PM peaks. • New bus stop boarder/bypass arrangements already operating successfully in London and not anticipated to create additional issues, but will be kept under review.
Loading	<ul style="list-style-type: none"> • Loading bays retained, although some relocated.
Town Centre Environment	<ul style="list-style-type: none"> • Minor public realm works at Alderman's Hill and pedestrian accessibility enhancement • No change assumed in base case, but potential for minor uplift assumed in better case.

Net Impact in Palmers Green

Impacts		Better Case	Base Case	Worse Case
Construction Phase	£	-£340,000	-£890,000	-£1,780,000
	%	-0.5%	-1.4%	-2.7%
	Impact	Negligible	Minor Negative	Minor Negative
Operational Phase (inc Transport Shift & Town Centre Environment)	£	£1,520,000	-£ 370,000	-£1,490,000
	%	+2.3%	-0.6%	-2.3%
	Impact	Minor Positive	Negligible	Minor Negative

- With mitigation measures implemented, we believe the impact of the operational phase would reach a neutral or positive level.
- If, as scheme planners anticipate, there is a transformational effect on town centre attractiveness and liveability, there could be a longer term uplift of up to 10-15%.
- Lack of clear UK precedents for the scheme means there is insufficient evidence for us to assume the scheme would have this effect, so this has not been modelled above.

Effects in Winchmore Hill Broadway

Construction Phase	<ul style="list-style-type: none"> • Temp. congestion/parking impact over c.6 weeks • Access to businesses maintained • c.40% cars / 70% bus users on non-discretionary trips so unlikely to change destination
Cycle Users	<ul style="list-style-type: none"> • Enhanced cycling connectivity attracting more cyclists to the centre • Most displaced from another form of transport
Car Users	<ul style="list-style-type: none"> • Changes to roads/junctions and additional buses stopping leading to extra delay of 40-50 seconds at AM & PM peaks • Reduced on-street parking (14 bays), however 71 spaces at Fords Grove car park to become pay & display, reducing commuter use and making more available for visitors • Many drivers on non-discretionary trips, so unlikely to change destination • Fords Grove to Southern end of Broadway is around 3 minutes' walk. • Overall, limited impact expected.
Bus Users	<ul style="list-style-type: none"> • Limited impact anticipated - minor changes to bus stop locations; junction delays only expected to lead to extra 40 second delays in AM & PM peaks • New bus stop boarder/bypass arrangements already operating successfully in London and not anticipated to create additional issues, but will be kept under review
Loading	<ul style="list-style-type: none"> • Same number of loading bays but slight relocation. • Some trade businesses concerned at loss of parking bays currently used informally for loading.
Town Centre Environment	<ul style="list-style-type: none"> • Minor public realm works at Compton Road and pedestrian accessibility enhancement • No change assumed in base case, but potential for minor uplift assumed in better case.

Net Impact in Winchmore Hill Broadway

Table 4.5 Summary of Net Impacts in Winchmore Hill Broadway

Impacts		Better Case	Base Case	Worse Case
Construction Phase	£	-£40,000	-£80,000	-£170,000
	%	-0.4%	-0.9%	-1.8%
	Impact	Negligible	Negligible	Minor Negative
Operational Phase (inc Transport Shift & Town Centre Environment)	£	£200,000	-£50,000	-£140,000
	%	2.1%	-0.6%	-1.5%
	Impact	Minor Positive	Negligible	Minor Negative

- With mitigation measures implemented, we believe the impact of the operational phase would reach a neutral or positive level.
- If, as scheme planners anticipate, there is a transformational effect on town centre attractiveness and liveability, there could be a longer term uplift of up to 10-15%.
- Lack of clear UK precedents for the scheme means there is insufficient evidence for us to assume the scheme would have this effect, so this has not been modelled above.

Effects in Green Dragon

Construction Phase	<ul style="list-style-type: none"> • Temp. congestion/parking impact over c.5 weeks • Access to businesses maintained • c.40% cars / 70% bus users on non-discretionary trips so unlikely to change destination
Cycle Users	<ul style="list-style-type: none"> • Enhanced cycling connectivity attracting more cyclists to the centre • Most displaced from another form of transport
Car Users	<ul style="list-style-type: none"> • Changes to roads/junctions and additional buses stopping leading to extra delay of c24 seconds at AM and PM peaks • Number of on-street parking bays will increase slightly (4 additional, to 59) • Loss of single yellow line parking with no off street alternative mean 6 fewer spaces in the evening • Minor negative impact is anticipated.
Bus Users	<ul style="list-style-type: none"> • Little impact anticipated as no changes to bus stop locations proposed, and no additional junction delays anticipated. • New bus stop boarder/bypass arrangements already operating successfully in London and not anticipated to create additional issues, but will be kept under review
Loading	<ul style="list-style-type: none"> • Minor changes to loading bays; no indication this creates issues for local businesses.
Town Centre Environment	<ul style="list-style-type: none"> • Minor public realm works at Vicars Moor Lane and Firs Lane junctions, and pedestrian accessibility enhancement • No change assumed in base case, but potential for minor uplift assumed in better case.

Net Impact in Green Dragon

Table 5.5 Summary of Net Impacts in Winchmore Hill Green Dragon

Impacts		Better Case	Base Case	Worse Case
Construction Phase	£	-£20,000	-£40,000	-£80,000
	%	-0.3%	-0.7%	-1.5%
	Impact	Negligible	Negligible	Minor Negative
Operational Phase (inc Transport Shift & Town Centre Environment)	£	120,000	-£10,000	-£40,000
	%	2.1%	-0.2%	-0.7%
	Impact	Minor Positive	Negligible	Negligible

- With mitigation measures implemented, we believe the impact of the operational phase would reach a neutral or positive level.
- If, as scheme planners anticipate, there is a transformational effect on town centre attractiveness and liveability, there could be a longer term uplift of up to 10-15%.
- Lack of clear UK precedents for the scheme means there is insufficient evidence for us to assume the scheme would have this effect, so this has not been modelled above.

Mitigation Measures

- **Construction Phase Mitigation**

1. **Design of construction works** – seek to maintain two-way access; phase sensibly to minimise disruption
2. **Traffic management plan** – seek to scope out congestion issues and ensure alternative provisions in place where possible
3. **Publicity and business liaison** – ensuring plans widely published ensuring businesses aware of what the work entails, how they might be impacted and when, and having business liaison officer on site
4. **Proactive efforts to maintain footfall** eg review temporary parking restrictions, wayfinding to guide pedestrians.

- **Operational Phase Mitigation**

1. **Car parking policy and arrangements** - clear signage to off-street car parks; clear and attractive routes from car parks to town centres; plans for some 30-minute free spaces; considering shorter maximum stay bays in some areas to increase turnover of cars parking
2. **Traffic flow** – introduce SCOOT tool, to constantly optimise signal timings and reduce congestion
3. **Individual businesses** particularly impacted (eg by changes to loading bays or changed location of parking bays) could be supported by the Council to address challenges created, depending on individual needs
4. **Town centre management** could help enhance overall economic vitality of the centres eg town teams proposal, to help develop stakeholder relationships, respond to issues, and offer opportunities for proactive work to enhance town centre vitality.

Summary of Impacts

- **Construction Phase**
 - Temporary disruption affecting traffic flow and parking
 - Overall impacts minor and within a single year
 - Range of mitigation approaches to reduce impact.
- **Operational Phase**
 - Overall impact on town centre economic vitality is very limited
 - Changes to car parking are most significant effect, but impacts can be minimised through sensible mitigation
 - Some individual businesses may be more disadvantaged and Council could explore how they can support, depending on individual needs.
 - There is potential for positive transformational change leading to a longer term uplift in footfall and spend.