SURVEY OF RETAIL CATCHMENT AREAS IN HAMMERSMITH & FULHAM 2004

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1. Introduction

As part of the process of gathering information for the new Local Development Framework process, which will involve consultation on planning issues later in 2005, a postal questionnaire survey was carried out to define the extent of the catchment areas of the Borough's main shopping centres and to gather opinions on the Town Centres and local neighbourhood centres. Some of this data complements questions on Town Centres included in the autumn 2004 Citizens Panel Survey, and the main results from this are also included in this report.

Surveys have been carried out in the past to define catchment areas within the Borough for food shopping, but this had not been done for a considerable time: Fulham was investigated in 1991, and the Borough as a whole in 1984. The current study to an extent demonstrates changes to catchments since these studies and prior to the completion of the White City Centre which will change the pattern of retailing in the Borough quite considerably.

2. Survey Objectives

The survey objectives were;

1) to define the extent of the primary food shopping catchment areas[1] within the Borough
2) to define the extent of the primary catchment areas for selected non-food items within the Borough
3) to obtain data on the three Town Centres including frequency of visit by residents, likes and dislikes and opinions on which facilities need improving in these centres
4) to obtain data on local neighbourhood centres including frequency of visit by residents, likes and dislikes and opinions on the need for improvement in these centres

3. Survey Procedure

A questionnaire was mailed to a random sample of 5,000 households in October 2004, and a reminder sent out in November. The eventual response was 1,497, or 30%, which is quite respectable for this type of survey.

The response was reasonably representative, and weighting was only applied to the tenure variable.

The results from any sample survey are subject to a sampling error. In the case of this survey, a response of almost 1,500 has an error of plus or minus 1.2 in a table where a value is 5%; in other words one can be 95% confident that the true value lies in the range 3.8 to 6.2. For greater values, the error margin is bigger. For a value in a table of 50%, the margin is plus or minus 2.5. This limits the degree to which one can look at groups within the population because as sample size decreases, error margins increase.

[1] The primary catchment area of a centre is the area within which that centre is used for shopping by more residents than any other centre

4. Summary of Results

The first question in the survey asked in which main shopping centre people spent most money on food and grocery shopping.

The main results are:

- Fulham Town Centre is used by the largest number of residents (22% of the total)
- Hammersmith is next (15%), then
- Tesco Brook Green (15%)
- Shepherds Bush Town Centre (9%)
- Sainsburys Sands End (8%)

One in five people (21%) go outside the Borough for their main food and grocery shopping, such as Chiswick or Kensington High Street.

One in ten people (10%) use smaller centres within the Borough for main food shopping.

Getting to the Shops
We found that people who mostly use smaller shopping centres usually walk (78%). The same is true of people who mostly use Fulham Town Centre (60%) and Shepherds Bush (58%). In contrast, people who mostly use Sainsburys in Sands End tend to go by car (67%) and only one in four walk (24%).

The Internet
At the moment only 3% of Borough residents, or 1 in 33, do most of their shopping on the internet although one in eight (12%) sometimes use it.

Shopping Other than Food
The Borough does not seem to be a major attraction for buying things other than food. Hammersmith does best in sales of clothing in that a quarter (25%) of residents use it as their main centre, but for music, furniture and electrical items, most trips appear to be to places outside the Borough.

Residents Opinions of the Town Centres
Residents told us that what they liked most about Hammersmith centre is
- The variety of shops, M&S and the evening entertainment

What they liked most about Fulham centre is
- The pubs, restaurants, entertainment and the street market

What they liked most about Shepherds Bush centre is
- Entertainment and the market

Residents also told what they disliked and in Hammersmith this included rubbish and dirt and traffic. In Fulham this included poor variety and lack of parking. In Shepherds Bush it included rubbish and dirt and poor variety of shops.

In all three Town Centres residents want to see
- Improvements to the range of shops other than food
- Improvements to the markets

Also,
- Improvements to food shopping and restaurants in Shepherds Bush

Main Survey Results

5. Food and Grocery Shopping

(a) Proportions of Residents Using Each Centre

The first question on the survey questionnaire was: ‘Which are the two main shopping centres, streets or supermarkets where you spend most money on grocery shopping (ie food and small household items)? Table 1 shows the main results from this.

Table 1: The Main and Second Centre Used by Residents for Food and Grocery Shopping

	First main centre, street, parade or supermarket	Second main centre, street, parade or supermarket
Hammersmith Town Centre	14.8	20.2
Fulham Town Centre	21.6	20.1
Shepherds Bush Town Centre	8.5	8.9
Tesco Brook Green	15.4	6.5
Sainsbury’s Sands End	7.7	3.0
Out of Borough	21.4	17.5
Small centres	9.5	13.3
Other	1.0	10.5

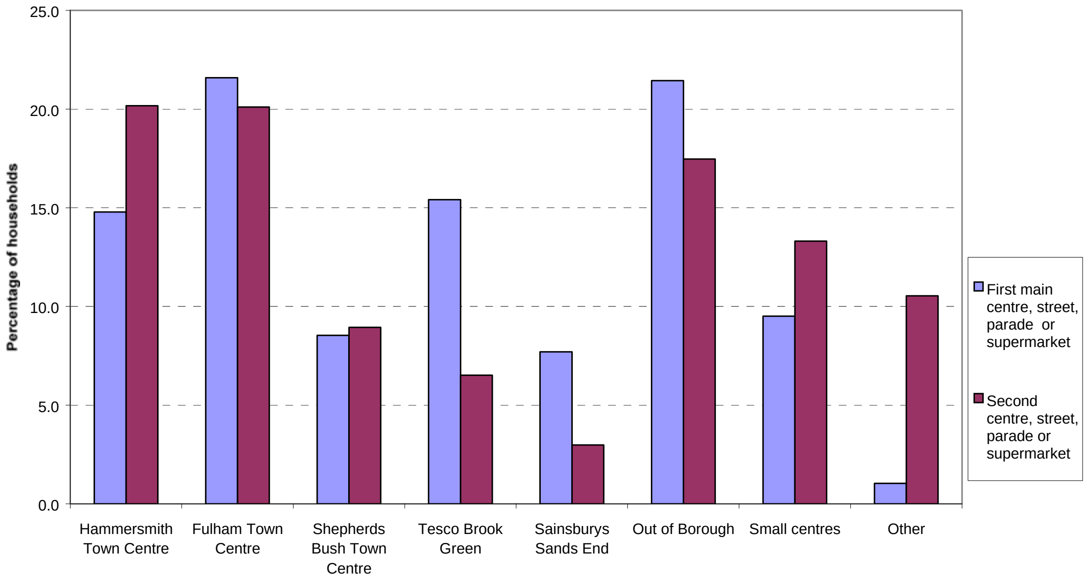
(% of respondents)

The first main shopping centre for food and groceries with the highest number of responses from the survey is Fulham Town Centre which is used by over a fifth of Borough residents (22%). The second main centre, used by 15% of residents as their main centre, is a single large supermarket, Tesco in Brook Green that is located close to Hammersmith Town Centre. Hammersmith Town Centre is the third main centre, with a similar proportion of residents, and Shepherd’s Bush Town Centre is the fourth main centre, used by one in twelve residents. Sainsburys in Sands End attracts one in thirteen.

Centres outside the Borough collectively draw over one fifth of Borough residents as their main centre (21%). Of residents who use centres outside the Borough as their main centre, three quarters go to five centres, all adjacent to the Borough, which are, in order:

- Tesco, Cromwell Road in Kensington
- Chiswick
- Putney
- Asda, Park Royal
- Acton

Fig 1: Households by Shopping centres for Food and Grocery



(b) Food Shopping Catchment Areas for First Main Centre

Respondents' postcodes are allocated to small geographical areas called Super Output Areas (SOAs), which are areas used in the Census. Each SOA is allocated to the main centre that residents within that SOA use, and this is how Map 1 is constructed.

Fulham Town Centre has the largest and most distinct catchment, larger than the other two Town Centres of Hammersmith and Shepherd's Bush.

The 'Out of Borough' catchment is broken into four separate areas:
- Tesco on Cromwell Road in Kensington
- Putney
- Chiswick
- Asda (Park Royal)

Catchment areas are in general fairly continuous areas around a centre, extending in the directions of transport routes. The Fulham Town Centre catchment covers a large part of Fulham but in the south is displaced by Putney which is more accessible to residents near Putney Bridge, and Sainsburys in Sands End. The other Town Centre catchments, Hammersmith and Shepherds Bush, are more tightly drawn around those centres. Tesco in Brook Green captures a considerable market in between the two, and both also lose out to Chiswick in the Starch Green area. In the East Acton area, smaller centres compete successfully with Shepherds Bush Town Centre.

(c) Changes in Town Centre Catchments for Food Shopping 1981 - 2004

There have been previous retail surveys carried out in 1981, 1984 and 1990 (for Fulham Town Centre only). Catchment areas based on ward boundaries were created in 1981, 1984 and 1990 whereas in the current survey Super Output Areas (SOAs) are used, to show more detail. Maps 2 to 4 show the change in the extent of catchments areas from 1981 to 2004 for the three Town Centres.

Although the current survey does not use Wards as a basis (the boundaries of which have changed anyway), it is possible to make some assessment of the change in shopping patterns.

The primary food catchment areas of all three town centre catchments appear to have shrunk over the 1981 to 2004 period. Most of this has been due to the opening of the two large edge of town superstores. In Fulham, Sainsburys in Townmead Road opened in 1989 which has captured much of the market in south Fulham, and in Shepherds Bush Tesco in Shepherds Bush Road opened in 1995, and this has captured much of the Brook Green/ Addison area from both Shepherds Bush and Hammersmith Town Centres.

In Shepherds Bush the size of College Park & Old Oak Ward as a geographical unit in previous surveys has obscured the detail of what has happened to the catchment area to the north of the Town Centre, though it may well have remained fairly stable in that direction in the past 20 years.

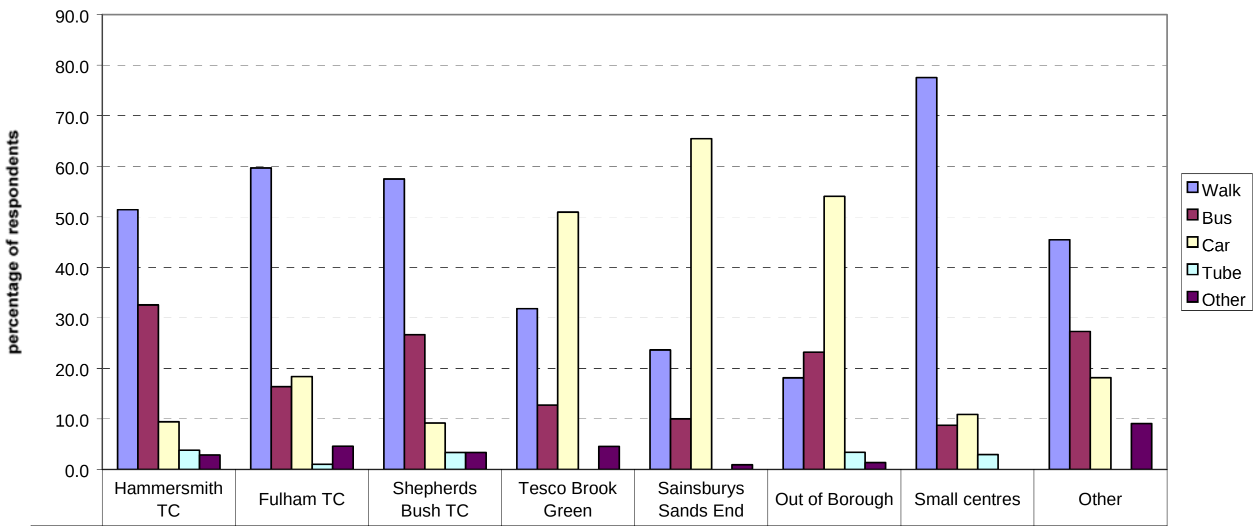
Hammersmith however does appear to have contracted, with competition from both Tesco and Chiswick.

(d) Characteristics of Food Shoppers

Means of Travel

The majority of people who use smaller shopping centres as their main centre usually walk (78%) as Fig 2 demonstrates. The same is true of people who mostly use Fulham Town Centre (60%) and Shepherds Bush (58%). In contrast, most people who use Sainsburys in Sands End tend to go by car (67%), as do those who use Tesco Brook Green (51%) and less than a third walk to these centres.

Fig 2: Means of Travel to the First Centre



	Hammersmith TC	Fulham TC	Shepherds Bush TC	Tesco Brook Green	Sainsburys Sands End	Out of Borough	Small centres	Other
Walk	51.4	59.7	57.5	31.8	23.6	18.1	77.5	45.5
Bus	32.5	16.4	26.7	12.7	10.0	23.2	8.7	27.3
Car	9.4	18.4	9.2	50.9	65.5	54.0	10.9	18.2
Tube	3.8	1.0	3.3	0.0	0.0	3.4	2.9	0.0
Other	2.8	4.6	3.3	4.5	0.9	1.3	0.0	9.1

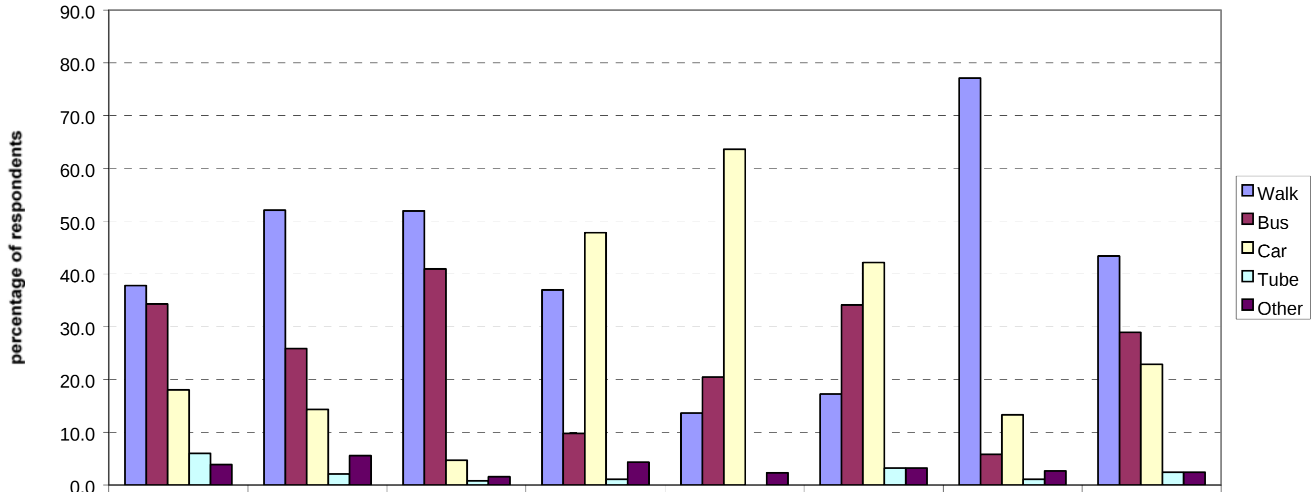
Residents' means of travel to the shopping destination listed as their second main centre is quite similar to the their means of travel to their main centre, as Fig 3 shows. The main exception is that higher proportions of residents using Town Centres as their second choice shopping centres go by bus rather than walk, presumably because they live further away than they do from their first choice centre. In 1990 a shopping survey was carried out in Fulham. Table 2 shows the proportion of people walking to both Fulham Town Centre and to Sainsburys in Townmead Road have increased over the 14 year period while the proportion of those driving to both have decreased. Use of public transport to Sainsburys has stayed the same but for the Town Centre it has dropped a little.

Table 2: Main Means of Travel to Fulham Town Centre and Sainsburys Sands End

Means of Travel	Fulham		Sainsburys Sands End	
	1990	2004	1990	2004
Walk	51.0	59.7	13.0	23.6
Car	23.0	18.4	74.0	65.5
Bus/Tube	21.0	17.4	10.0	10.0
Other	5.0	4.6	4.0	0.9

(% of respondents)

Fig 3: Means of Travel to the Second Centre



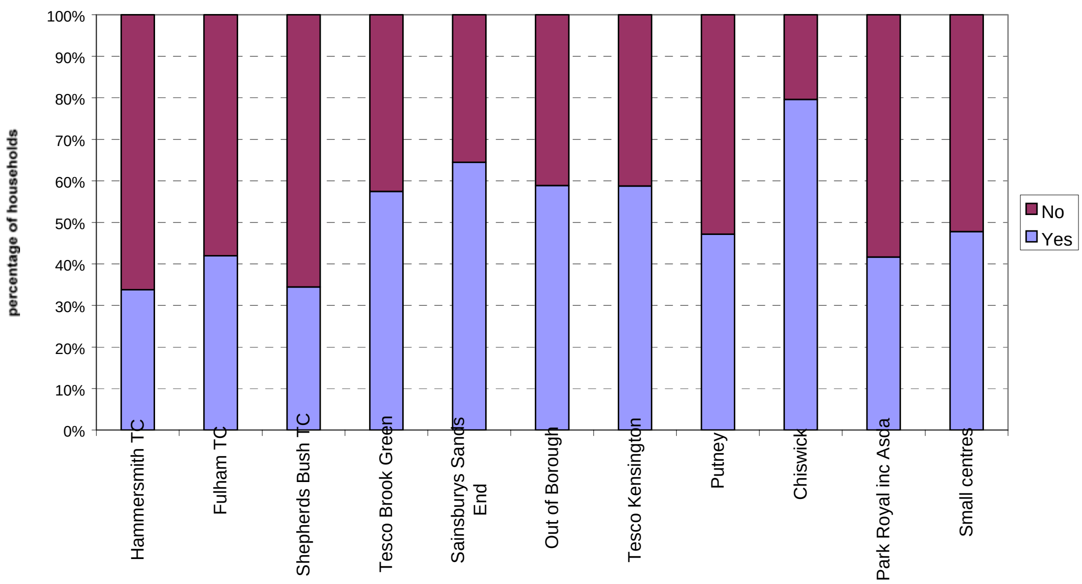
	Hammersmith TC	Fulham TC	Shepherds Bush TC	Tesco Brook Green	Sainsburys Sands End	Out of Borough	Small centres	Other
Walk	37.8	52.1	52.0	37.0	13.6	17.3	77.1	43.4
Bus	34.3	25.9	40.9	9.8	20.5	34.1	5.9	28.9
Car	18.0	14.3	4.7	47.8	63.6	42.2	13.3	22.9
Tube	6.0	2.1	0.8	1.1	0.0	3.2	1.1	2.4
Other	3.9	5.6	1.6	4.3	2.3	3.2	2.7	2.4

Demographic Characteristics

There are significant differences between shoppers who use the Town Centres as their main centre and those who use the two out of centre superstores or out-of-Borough centres.

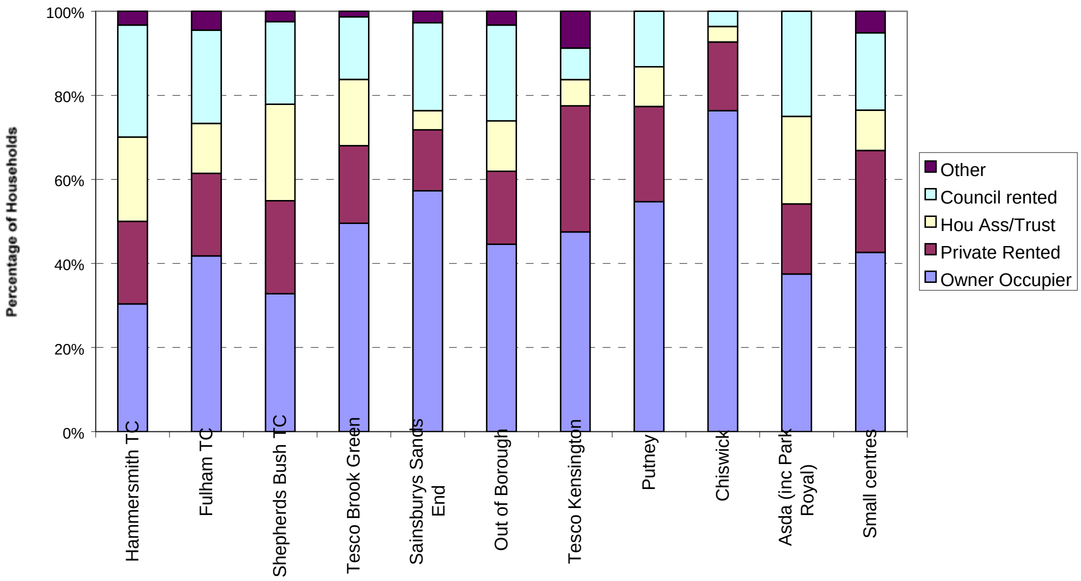
Fig 4 shows that the car ownership rates of Town Centre users are well under 50% while for the superstores, Tesco Kensington, Chiswick and other out-of-Borough centres with the exception of Asda Park Royal and Putney they exceed 50%. Under half of those using small neighbourhood centres are car owners also.

Fig 4: Car Ownership by Main Shopping Centre



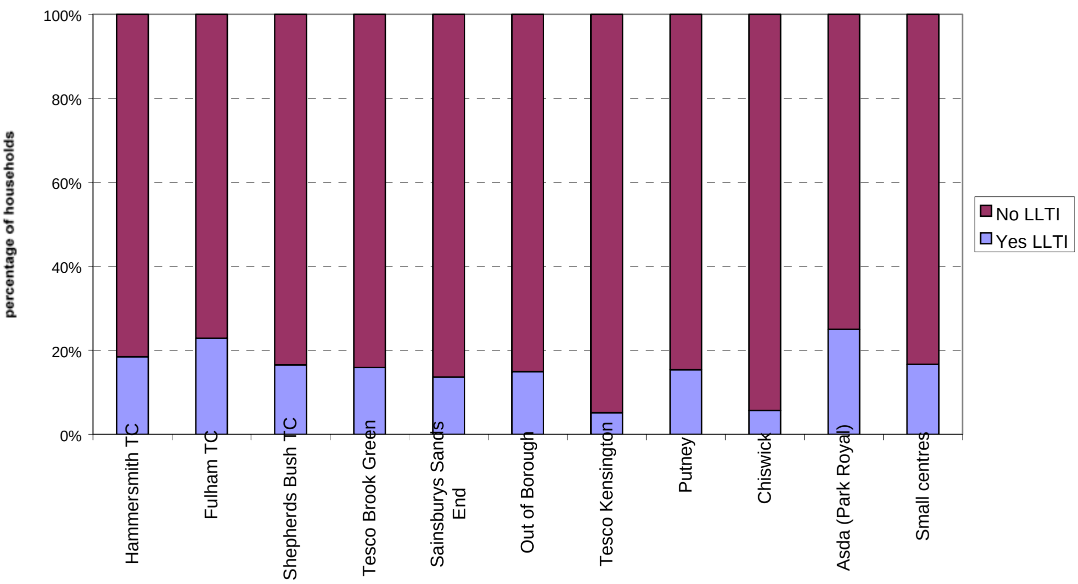
A corresponding pattern is seen in the tenure of shoppers by centre as shown by Fig 5.

Fig 5: Tenure by Main Shopping Centre



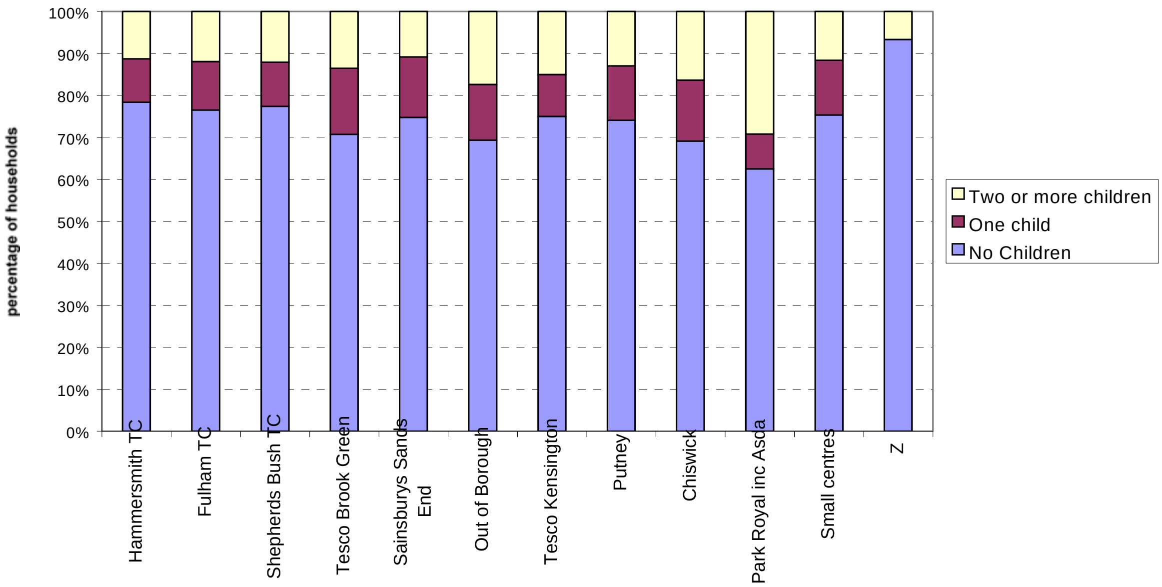
Those using the Town Centres or Asda Park Royal tend to have higher rates of limiting long-term illness (Fig 6).

Fig 6: Limiting Long Term Illness (LLTI) by Main Shopping Centre



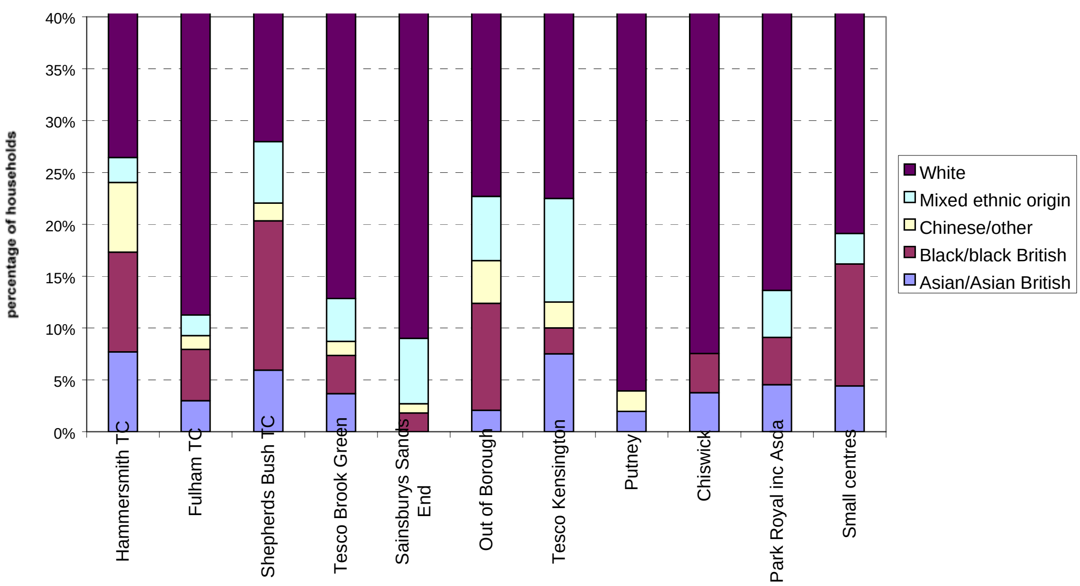
The three Town Centres have similar proportion shoppers with no children and with children. The highest rates of shoppers with children are in Royal Park including Asda. (Fig 7).

Fig 7: Households with children by Main Shopping Centre



The highest rates of shoppers in ethnic groups other than White are in Shepherds Bush and Hammersmith Town Centres. Those who use Fulham Town Centre, Sainsburys in Sands End, Putney and Chiswick have particularly low proportions (Fig 8).

Fig 8: Ethnic Groups by Main Shopping Centre



(e) Internet Shopping

Very small proportions of respondents use the internet for food and grocery shopping. 11.6% sometimes use the Internet, whereas only 2.9% do most of their shopping on the internet. This low percentage contrasts with the 10.7% of respondents who use the internet to purchase music. These survey results show how online grocery shopping has yet to take off. Nationally, “In the fourth quarter of 2004, 52 per cent of households in the UK (12.6 million) could access the Internet from home, compared with just 9 per cent (2.2 million) in the same quarter of 1998.”[2] In Hammersmith & Fulham 74% have access to the internet for personal use[3].

Table 3: Use of the Internet for Food Shopping

Do you use the internet for shopping for food and groceries?	%
No, I never use the internet for food and groceries	85.4
Yes, I sometimes use the internet for food and groceries	11.6
Yes, I do most of my shopping for food and groceries on the internet	2.9

(% of respondents)

Table 4: Use of the Internet for Shopping by Tenure

	Owner Occupier	Private Rented	Public rented	Other
Yes use internet for most or all food shopping	63	23	13	1
Yes use Internet for buying Music	60	37	3	0
All respondents	44	20	32	4

(% of respondents)

Tenure as a proxy for affluence may be a reasonable guide to identifying internet users. Table 4 shows that 63% of internet food shoppers and 60% of internet music shoppers are owner occupiers, compared to 44% in the borough as a whole. Private renters are also over-represented among internet users, while public renters are very much under-represented.

A population characteristic that may be important in understanding the use of the internet for shopping is car ownership, as those not owning car maybe more inclined to have their shopping delivered to their homes. However, residents who use the internet for food and music shopping who responded to this survey have a higher level of car ownership than the borough average, suggesting internet shopping is used more by more affluent residents.

[2] Individuals accessing the Internet – National Statistics Omnibus Survey
Access to Internet from home – Source - Family Expenditure Survey (April 1998 to March 2001); Expenditure and Food Survey (April 2001 onwards)

[3] Citizens Panel survey Spring 2004

6. Shopping for Non-Food Items

The survey asked residents about shopping for a selected range of non-food items:

- clothing and footwear
- music (CDs, DVDs, videos etc)
- furniture
- small electrical items (TVs, cameras, kettles etc)
- large electrical items (washing machines, fridges etc)

The response was variable on these questions (see Table 5), undoubtably in part depending on whether people had recently purchased such items. Response was lowest in relation to furniture and large electrical items, which of course are infrequently purchased.

(a) Where People Shop for Non-Food Items

It appears from Table 5 that for all the items specified people are more likely to shop from some other source than to use a shopping centre in the Borough. Other sources include most significantly out-of-Borough centres, but also internet or mail order. Borough centres score highest for music purchases where 13% of residents use Fulham Town Centre as their main destination, and 12% use Hammersmith Town Centre. However, the great majority of those who responded to the question shop outside the Borough for clothing and footwear, furniture and large electrical items.

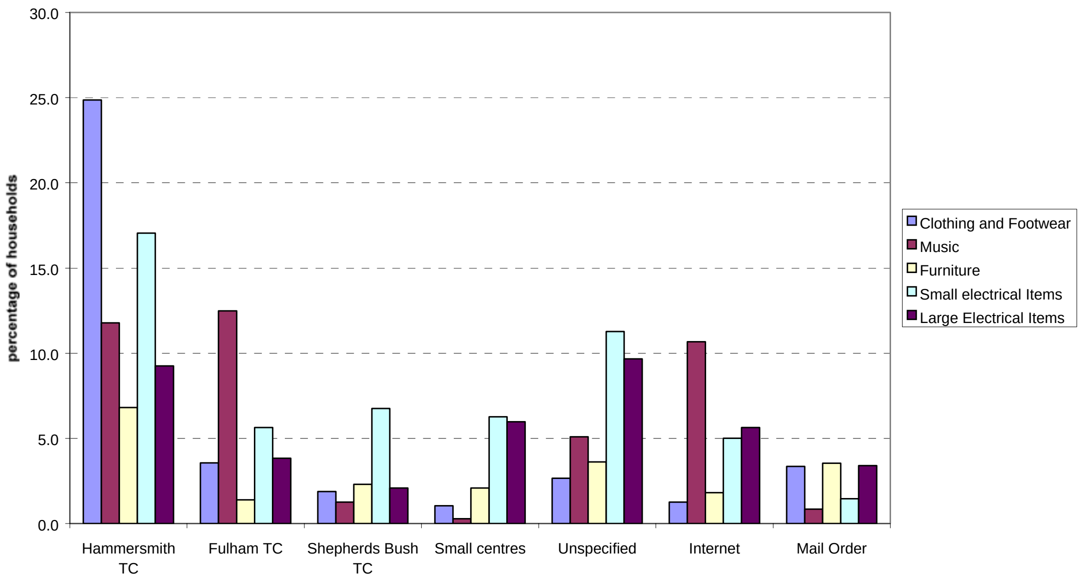
Of the Town Centres in the Borough, Hammersmith performs best in these selected non-food items: 25% of residents say they go there as their main centre for clothing and footwear, 12% for music and 17% for small electrical items. Fulham is clearly the second centre though it performs badly in clothing and footwear and electrical items. Shepherds Bush has no real draw for any of the items specified and is clearly in need of more volume comparison goods retailers.

Table 5: Where People Shop for Non-Food Items

	Clothing and Footwear	**Music**	**Furniture**	**Small electrical Items**	**Large Electrical Items**
Hammersmith TC	24.9	11.8	6.8	17.0	9.2
Fulham TC	3.6	12.5	1.4	5.6	3.8
Shepherds Bush TC	1.9	1.3	2.3	6.8	2.1
Tesco Brook Green	0.0	0.6	0.0	0.1	0.0
Sainsbury's Sands End	0.0	0.3	0.0	0.1	0.0
Out of Borough	52.2	28.2	35.6	31.0	30.9
Small centres	1.0	0.3	2.1	6.3	6.0
Unspecified Store Location	2.7	5.1	3.6	11.3	9.7
Internet	1.3	10.7	1.8	5.0	5.6
Mail Order	3.4	0.8	3.5	1.5	3.4
No response	9.1	28.5	42.8	15.4	29.2

(% of respondents)

Fig 9: Shopping for things other than food and groceries



(b) Clothing and Footwear

The map showing catchment areas for clothing and footwear items (Map 5) shows the spatial domination of Hammersmith Town Centre. Many residents specify particular brands that they use, in particular Primark (5.6% of respondents) and M&S (2.4%).

The draw of High Street Kensington penetrates the Borough on the east side, in Brook Green and west Kensington, and also some parts of Fulham.

In the same way, in the south of the Borough, Chelsea/Kings Road and also the Peter Jones store in Sloane Square attracts many residents of South Fulham around New Kings Road.

There are few parts of the Borough where the Fulham and Shepherds Bush Town Centres draw a majority for clothing and footwear.

(c) Music

The most noticeable feature of Map 6 is the large catchment area of Fulham Town Centre that dominates Fulham south of Lillie Road. That this is substantially due to the presence of the Virgin Megastore in the Fulham Broadway shopping centre and HMV in Fulham Town Centre. The Fulham music catchment is in fact larger than the Fulham Food catchment (Map 1) though here Sainsburys also competes.

Hammersmith Town Centre also has a significant catchment, though not as large as in clothing and footwear, but Kensington High Street has little influence. Oxford Street/West End and the internet fragment these catchments and have a significant influence in Hammersmith and Shepherds Bush. The internet tends to be the most popular ‘destination’ in some areas away from the town centres.

The opening of HMV in King Street in October 2005 will undoubtably cause a shift in the catchment for Hammersmith town Centre.

(d) Furniture

An overwhelming majority of residents travel outside the borough to buy furniture. Of the 35% Out-of-Borough responses (see table 5) IKEA alone accounts for a third, or 11% of all responses, the next three largest destinations (all with approximately 3% of all residents) being Chelsea/Kings Road, Oxford Street/West End and Peter Jones. The IKEA catchment is spread across the borough in no clear pattern though most people probably go to the IKEA store in Brent Park to the north which is the nearest store for residents.

Of the three Town Centres, Hammersmith has the largest catchment (there is a Habitat store); the other two have very limited influence (Map 7).

(e) Small Electrical Goods

Hammersmith Town Centre and Kensington High Street have a dominance in sales of small electrical goods in a similar way to clothing and footwear (Map 8). In this instance Shepherds Bush Shepherds Bush Town Centre has a more extensive catchment. The picture is less clear in the south of the borough with Fulham Town Centre, Peter Jones, Putney and Currys (Carnwath Road) vying each other as the most popular destinations. Currys in the retail park on Carnwath Road is the destination for 4% of respondents overall.

(f) Large Electrical Goods

For large electrical goods Currys in the retail park on Carnwath Road is the destination for 5% of respondents overall, only slightly more than for small electrical items but in fact the catchment area is more extensive (Map 9). Likewise the Peter Jones catchment is much more expansive for larger electrical items; its share of respondents rises from 6% for small electrical items to 9% for large ones. The catchment of Out-of-Borough destinations which are not adjacent to the Borough is also larger. John Lewis on Oxford Street has double its percentage of respondents and increases the number of areas where it is the most popular destination. Responses where the brand of the store is known but the location is unspecified grow significantly to further cloud the picture of this already fragmented catchment area distribution.

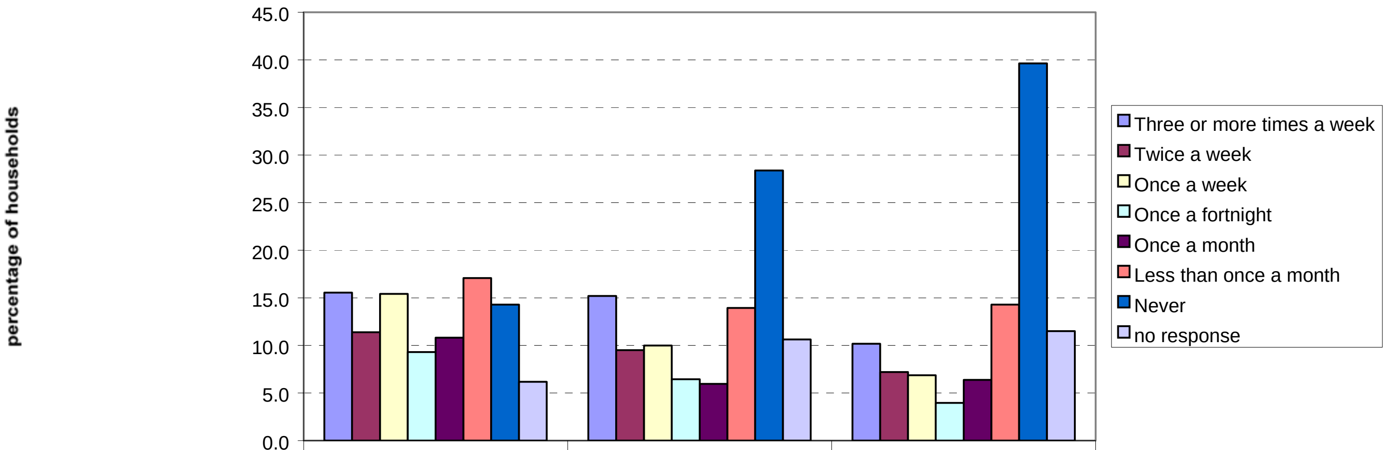
7. Town Centres

(a) Frequency of Visits to Town Centres

Residents were asked how often they visited the Town Centres for shopping or to use local services including restaurants. Hammersmith is the most frequently visited Town Centre, with almost one in two residents visiting it at least once a week (Fig 10 shows 42%, with 6% giving no response). In comparison, one in three visit Fulham at least once a week, and one in four visit Shepherds Bush. Only around one in seven (14%) say they never visit Hammersmith, but in the case of Shepherds Bush this figure rises to four in ten (40%). Of course, this is partly a matter of accessibility (for example, it is not particularly easy to get to Shepherds Bush from Fulham) and volume of local employment in a centre but it certainly also reflects the attractiveness or draw of each centre for shopping and other services.

Those who never visit Hammersmith and Shepherds Bush Town Centres have a higher propensity to be owner occupiers (60% and 54% respectively) than the Borough average, and to be car owners (59% and 58%), and to be of White ethnic origins.

Fig 10: Frequency of Visit to Town Centres for shopping or use other services including restaurants



	Hammersmith TC	Fulham TC	Shepherds Bush TC
Three or more times a week	15.5	15.2	10.2
Twice a week	11.4	9.5	7.2
Once a week	15.4	10.0	6.9
Once a fortnight	9.3	6.4	4.0
Once a month	10.8	6.0	6.4
Less than once a month	17.1	13.9	14.3
Never	14.3	28.4	39.6
no response	6.2	10.6	11.5

(a) What Residents Like About the Town Centres

Residents were asked for their opinion on what were the main attractions for them in each of the Town Centres. Multiple responses were allowed. The results for each centre are shown in Tables 6-8.

In the tables, "Nothing" was an actual written answer given by people. "Nothing" has been interpreted as meaning there are no attractions for the respondent in the Town Centre in question.

Shepherds Bush is the most popular Town Centre for entertainment, with 15% of residents saying this was what they liked about it. Fulham was second (10%) and Hammersmith third (6%). On the other hand Fulham is most popular for pubs, restaurants and bars with 11% of residents saying this was what they liked compared to 6% for Shepherds Bush and 5% for Hammersmith.

In Hammersmith Marks and Spencer's and Primark are singled out as main attractions for 6% and 5% respectively, while in Fulham Waitrose is a favourite brand destination for 5% of people. Shepherd's Bush does not have an equivalent branded destination on its list of attractions.

The variety of shops on offer in a centre is more of a factor in Hammersmith than the other two centres, with 14% of residents citing this. However, in Shepherds Bush 11% refer to the market as an attraction to them, as do 9% in Fulham.

Some 15% of residents say that nothing is attractive to them in Shepherd's Bush Town Centre. It was noted above that 40% of Borough residents never visit Shepherds Bush Town Centre; and three quarters (75%) of those who say that the centre has no attractions for them never visit it. For some of these people, this may mean that they are unaware of what is in the centre.

Fewer residents say that nothing is attractive to them about Hammersmith or Fulham Town Centres, and here again the majority of those that do say this are people who never visit those centres.

Table 6: What People Like About Hammersmith Town Centre

Response description	No of responses	%
Variety of shops	254	14.4
General Convenience	136	7.7
Marks and Spencer's	100	5.7
Entertainment (inc. Cinema, Theatre, Gigs)	98	5.6
Pubs, restaurants and bars	87	4.9
Specific type of shops (charity, ethnic)	87	4.9
Primark	81	4.6
Nothing	80	4.5
Near public transport	71	4.0
Food and grocery shopping	65	3.7
Kings Mall Shopping Centre	58	3.3
Parking is good	51	2.9
Other responses	595	33.7
Total	1763	100.0

Table 7: What People Like About Fulham Town Centre

Response description	No of responses	%
Pubs, restaurants and bars	163	11.1
Entertainment (inc. Cinema, Theatre, Gigs)	145	9.9
Variety market	134	9.1
Variety of shops	120	8.2
General Convenience	104	7.1
Nothing	90	6.1
Food and grocery shopping	73	5.0
Waitrose	70	4.8
Don't Shop here	68	4.6
Specific type of shops (charity, ethnic)	65	4.4
Other responses	438	29.8
Total	1470	100.0

Table 8: What People Like About Shepherds Bush Town Centre

Response description	No of responses	%
Nothing	161	14.8
Entertainment (inc. Cinema, Theatre, Gigs)	160	14.7
Variety market	115	10.6
Don't Shop here	65	6.0
Pubs, restaurants and bars	61	5.6
Variety of shops	60	5.5
General Convenience	55	5.1
Food and grocery shopping	52	4.8
Other responses	357	32.9
Total	1086	100.0

(a) What Residents Dislike About the Town Centres

Residents were asked what they disliked about Town Centres. The first general point to make here is that for Hammersmith and Fulham Town Centres there was a greater volume of comments about likes compared to dislikes, but for Shepherds Bush the balance was more even.

Poor variety of shops is cited by 14% of respondents in Hammersmith Town centre as something they dislike (Table 9), and this is referred to by 13% in relation to Shepherds Bush and 10% in relation to Fulham. The one other factor referred to in relation to the retail offer is that 5% say that Hammersmith has no quality clothing retail.

One in eight (12%) say Shepherds Bush is not convenient to get to compared to 8% for Fulham and 5% for Hammersmith. This clearly has a relationship to data quoted above on frequency of visit.

The perceived unsafe nature of a centre constitutes quoted 9% of responses in relation to Shepherds Bush, and 6% in both Hammersmith and Fulham.

The other factors quoted in Tables 9-11 are all environmental ones. Rubbish and dirt is cited in 13% of responses in relation to Shepherds Bush, 10% in Hammersmith and 9% in Fulham. The perceived lack of parking is felt most strongly in relation to Fulham, with 10% of responses compared to 7% in Hammersmith and 6% in Shepherds Bush. A general unattractive environment is cited in 10% of responses in relation to Shepherds Bush compared to 9% in Hammersmith and 6% in Fulham. ‘Crowds’ is a factor cited in relation to Hammersmith but is not a significant issue in the other centres.

Table 9: What People Dislike About Hammersmith Town Centre

Response description	No of responses	%
Poor Variety	163	13.6
Rubbish/dirty	124	10.3
Traffic	104	8.7
Unattractive Environment	103	8.6
Lack of parking	82	6.8
Unsafe	67	5.6
Crowds	66	5.5
No quality clothes	65	5.4
Nothing I don’t like	61	5.1
Location (not convenient to get to)	55	4.6
Other	52	4.3
Other responses	257	21.4
Total	1199	100.0

Table 10: What People Dislike About Fulham Town Centre

Response description	No of responses	%
Poor Variety	96	10.0
Lack of parking	94	9.8
Rubbish/dirty	89	9.3
Don't shop here	78	8.1
Location (not convenient to get to)	75	7.8
Traffic	70	7.3
Unattractive Environment	59	6.1
Unsafe	56	5.8
Other responses	345	35.9
Total	962	100.0

Table 11: What People Dislike About Shepherds Bush Town Centre

Response description	No of responses	%
Rubbish/dirty	139	13.4
Poor Variety	135	13.0
Location (not convenient to get to)	121	11.6
Unattractive Environment	100	9.6
Unsafe	90	8.7
Lack of parking	60	5.8
Other responses	395	38.0
Total	1040	100.0

(a) What Facilities Residents Would Like to See Improved in Town Centres

Residents were asked what three facilities they would like to see improvements to in each Town Centre, with a list of items specified and a box for any other responses to be written in.

The main improvement that people would like to see in all three Town Centres is an improvement in non-food shopping, as Fig 11 shows. This comment constitutes around a quarter of responses in all three centres, though the figure is lower for Hammersmith than for the other two.

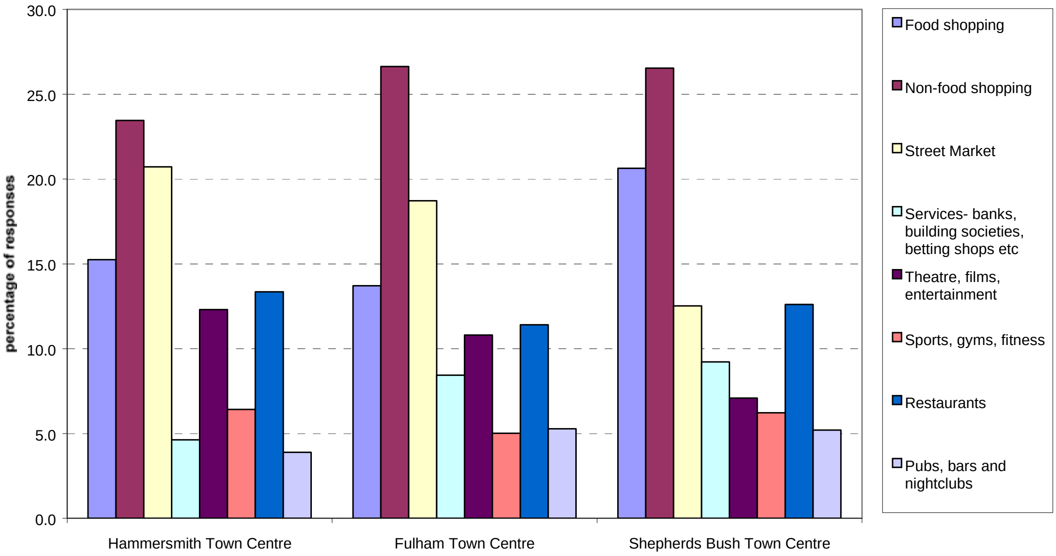
More respondents would like to see an improved street market in Hammersmith than in the other two town centres.

The centre that attracts most responses in relation to improvements to food shopping is Shepherds Bush.

Improvements to entertainment is desired by more in relation to Hammersmith than the other two centres. On the other hand Hammersmith attracts fewer responses in relation to services such as banks and building societies than the other two centres.

The desire for improvements to the street market was more significant in Hammersmith (where the market had been displaced by works to Lyric Square) than Fulham or Shepherds Bush, although in Fulham this factor was also quite significant, attracting 18% of responses. Satisfaction appears to be highest in relation to the market at Shepherds Bush.

Fig 11: Facilities that residents would like to see improved in the Town Centres



(a) The Rating of Facilities in Town Centres from the Citizens Panel Survey 2004

In November/ December 2004, just a little later than the retail survey, one of the regular Citizens Panel surveys was carried out. This was a postal questionnaire survey of 1,237 households resident in the Borough with a 54% response (667). Included in the survey were some questions that were complementary to the retail survey, including questions on people's perception of Town Centres.

Table 12: Householders' Rating of Town Centres for Facilities in the Citizens Panel Survey

% households	Hammersmith			Fulham			Shepherds Bush		
	High	Low/ don't use	DK	High	Low/ don't use	DK	High	Low/ don't use	DK
Food shopping	22	24	3	32	31	5	27	32	8
Non-food shopping	20	18	3	15	33	5	11	33	8
Street market	11	32	4	28	34	4	24	31	8
Services	35	22	3	25	32	5	21	33	8
Theatre, film, entertainment	25	19	3	21	32	5	24	28	8
Sports, gym, fitness	13	35	5	15	40	6	10	43	9
Evening activities	13	29	4	18	33	5	12	33	9

Notes: Percentage Ratings do not add up to 100 because opinions which are in the categories 'a little', 'not much' or 'don't care either way' are excluded from the table.
'Services' refers to banks, building societies, opticians, betting shops etc
'Evening activities' refers to restaurants, clubs, pubs, bars

The catchment area analysis in the retail survey demonstrated that Fulham was the most popular centre for food shopping in the Borough, with 22% of residents saying it was their main centre, and 35% visit it once a week or more. Fulham is also the most highly valued centre in the Citizens Panel survey, with 32% valuing it ‘a lot’ or highly. In fact in the above table Shepherds Bush is more highly valued for food shopping than Hammersmith (27% value Shepherds Bush highly) although in the catchment area analysis Hammersmith appears to be used by more residents (15% saying it was their main centre compared to 9% for Shepherds Bush).

In accordance with catchment area results, residents value Hammersmith highest of the three centres for non-food shopping (20% rate Hammersmith highly compared to 15% for Fulham and 11% for Shepherds Bush).

The street market at Fulham is the most highly rated of the three, with 28% of residents valuing it highly (Shepherds Bush 24% and Hammersmith 11%). The low rating for Hammersmith is clouded by the fact that the market was not operating at the time of the survey because of Lyric Square improvements.

Residents aged 35 or over were significantly more likely to say that they valued Fulham Town Centre for the street market than those under 35.

Hammersmith is the most valued centre for services including banking and so on: 35% rate it highly compared to 25% for Fulham and 21% for Shepherds Bush. Hammersmith has a higher number of service outlets than the other centres.

For entertainment, the three centres have similar ratings: 25% rate Hammersmith highly, 24% Shepherds Bush and 21% Fulham. Hammersmith however has the lowest negative rating in the sense of being valued lowly or never used by only 19% of residents. This is a much lower percentage than the other two centres where nearly a third of residents give them low ratings or never use them.

Fig 10 showed that Hammersmith is visited once a week or more by 42% of residents for whatever reason, compared to 35% for Fulham and 24% for Shepherds Bush. The Citizens Panel survey showed, as recounted above, that Hammersmith is the most highly valued centre for non-food shopping, services and entertainment, (though not for food shopping). It has the highest number of outlets overall in these areas, partly driven by being the major employment centre in the Borough.

The three centres have similar scores have lower ratings for sports, gym and fitness facilities, partly due to the fact that not everyone in the population uses such facilities, and the three centres have similar scores in this respect.

For evening activities such as restaurants, clubs, pubs and bars, Fulham has the highest rating score; 18% rate it highly compared to 13% for Hammersmith and 12% for Shepherds Bush. Residents aged under 35 were significantly more likely to say that they valued Shepherds Bush for evening activities than those aged over 35.

8. Local Neighbourhood Facilities

The survey included a question on the main local neighbourhood parade or group of shops' used. In response to this, 28.6% of respondents have named one of the three Town Centres and 8.4% have named a centre outside the Borough. Askew Road is the highest ranked neighbourhood centre in the Borough but this received only 3.3% of responses.

Table 13: The Main Neighbourhood Centres Used by Residents

Main local neighbourhood parade or group of shops	%
Fulham TC	14.2
Hammersmith TC	12.0
Out of Borough	8.4
no response	6.3
Shepherds Bush TC	6.0
Askew Road	3.3
Greyhound Road	3.2
Fulham Road	2.9
Blythe Road	2.6
Iceland East Acton	2.6
Waitrose Fulham	1.9
Parsons Green	1.7
Wandsworth Bridge Rd (north)	1.7
Uxbridge Road East	1.6
North End Road Market	1.5
Other Shepherds Bush Road/ Brook Green	1.5
Brackenbury	1.4
Others	27.4
Total	100

The Citizens Panel survey, carried out just after the retail survey, showed how highly residents value smaller local centres outside the Town Centres in that 40% of respondents value such centres in general 'a lot' and only 3% of respondents do not value them at all or don't use them (the rest have less strong opinions or don't know).

(a) Frequency of Visits to Neighbourhood Centres

Table 14 shows that 80% of respondents use these local shops at least once a week which is a much higher rate than residents' visits to Town Centres. Clearly most visits relate to more frequent top-up shopping.

Table 14: Frequency of Use of the Main Neighbourhood Centres Used by Residents

How often do you use these local shops?	%
Three or more times a week	46.5
Once or twice a week	33.6
Less than once a week	11.1
No response	8.7

Note: Excludes comments made in relation to Town Centres

(b) What Residents Like About the Neighbourhood Centres

Utilising data on neighbourhood centres only and exluding that in relation to Town Centres, general convenience and convenient location are unsurprisingly the main group of factors that people like about neighbourhood centres. Some people, albeit a minority, clearly feel that these centres meet most of their needs, citing variety, cheapness, and quality.

Table 15: What People Like About Neighbourhood Centres

Response description	No of responses	%
Generally Convenient	186	11.3
Food	154	9.4
Location (convenient to get to)	136	8.3
Specific types of shops	113	6.9
Friendly	109	6.6
Variety of shops	93	5.7
Convenient on foot	81	4.9
Near work/home	68	4.1
Cheap	67	4.1
Quality	65	4.0
Open Late	54	3.3
Fruit market	45	2.7
Pubs, restaurants and bars	44	2.7
Everything I need	38	2.3
Others	388	23.6
Total	1641	100.0

Note: Excludes comments made in relation to Town Centres

(c) What Residents Dislike About the Neighbourhood Centres

Poor variety of shops and higher cost are the main factors that people dislike about neighbourhood centres.

Table 16: What People Dislike About Neighbourhood Centres

Response description	No of responses	%
Poor Variety	233	21.8
Cost/Expensive	170	15.9
Nothing I don't like	68	6.4
Rubbish/dirty	61	5.7
Other	39	3.6
No quality clothes	30	2.8
Unattractive Environment	28	2.6
Others	441	41.2
Total	1070	100.0

Note: Excludes comments made in relation to Town Centres

(d) What Residents Suggest as Improvements to Neighbourhood Centres

People were asked what they would suggest as improvements to neighbourhood centres, allowing completely open-ended responses. Table 17 shows the results. The main suggestions are around a wider range of shops and cleaning up and improving the environment.

Table 17: What People Suggest as Improvements to Neighbourhood Centres

Response description	No of responses	%
Wider range of shops	191	18.2
Clean up/improve environment	132	12.6
Another supermarket	72	6.9
Do Nothing	56	5.3
Provide more car-parking	55	5.2
Improve Safety	42	4.0
Widen pavements	34	3.2
Traffic	30	2.9
More upmarket M&S, Waitrose	30	2.9
Others	407	38.9
Total	1049	100.0

Note: Excludes comments made in relation to Town Centres