

Haringey Council

Traffic Management

Parking charges impact assessment 2012: Full report with tables and charts

INTRODUCTION

All Haringey's residents and businesses are affected by parking issues irrespective of whether they use or own a car. While many residents and businesses want accessible and cheap parking; Councils have to think about many other aspects including managing scarce kerb space, the safe and efficient movement of traffic, and providing an attractive street environment.

This report sets out results of research into the impact of parking charges on businesses and visitors in the main shopping areas of three of Haringey's district town centres: Muswell Hill Broadway, Crouch End Broadway and Harringay Green Lanes. The research has been carried out with businesses in and visitors to these local town centres.

The survey commenced mid May 2012 with 250 business survey questionnaires with Freepost return envelopes hand delivered to shops and businesses in each of the three town centres making a total of 750. A further 750 visitor survey questionnaires were placed on cars parked in the shopping areas of each town centre. Parking in these areas is mainly of the 'pay and display' type.

The questionnaires were hand-delivered by staff of Reliable Distribution who also made two follow-up visits at different times and days of the week to each town centre to ensure good and representative responses were received by the survey closing date of 11 June.

Over 300 additional forms were requested from the council by Green Lanes traders' representatives, who announced they would assist the exercise by encouraging businesses and visitors to complete the questionnaires. These additional forms were marked 'GL Extra' so as to distinguish them from the main distribution.

The survey questionnaires were designed to obtain objective information rather than just listen to familiar and repetitive value judgments about how local authorities run parking services. Haringey Council, along with most local authorities across the country entirely understands that businesses would like readily available, long stay parking spaces available at low cost. We are equally aware of competition faced by local town centres from shopping malls and centres which offer cheap or free car parking. Unfortunately the increasing competition for limited road space means the old objective of providing this type of parking solution has had to give way to a more strategic approach to parking management.

DATA ANALYSIS 1: THE BUSINESS PERSPECTIVE

Although proceeding in much the same way as a consultation; this survey has ensured that responses are representative of the main types of business in each town centre. Thus in Harringay Green Lanes the retail offering is notable for:

- Bakers, specialist grocers and convenience stores
- Fast food takeaway outlets
- Cafes, snack shops and tea rooms
- Jewellers
- Hairdressers, barbers and beauty salons
- Letting and estate agents

- Betting shops

Many of these outlets reflect the ethnicity and culture that gives Green Lanes and Crouch End and Muswell Hill their unique community atmosphere which attracts many visitors from outside the borough. It is this community atmosphere allied with quality goods and services which make Green Lanes, Crouch End and Muswell Hill very attractive to shoppers and visitors in ways which are not replicated by the major shopping centres and malls.

A total of 146 businesses responded to the business survey. The numbers from each local town centre are set out in table Q2 below.

Table Q2

| | | Count |
|----------------------|-----------------------|-------|
| Location of business | Crouch End | 42 |
| | Harringey Green Lanes | 65 |
| | Muswell Hill | 39 |
| | Total | 146 |

Businesses were asked to estimate the proportions of shoppers coming to their town centres by car, bus or tube, and by foot or bicycle. The average estimates by businesses in each locality are set out in Table Q3a and show that Green Lanes businesses believe that 66% of their customers come in by car. In Crouch End the estimate is significantly lower at 47%.

Table Q3a

Report

| Location of business | | Est Travel by car | Est Travel by bus or tube | Est Travel by foot |
|-----------------------|------|-------------------|---------------------------|--------------------|
| Crouch End | Mean | 46.55 | 20.60 | 32.86 |
| | N | 42 | 42 | 42 |
| Harringey Green Lanes | Mean | 65.85 | 18.32 | 15.83 |
| | N | 65 | 65 | 65 |
| Muswell Hill | Mean | 59.49 | 20.26 | 20.26 |
| | N | 39 | 39 | 39 |
| Total | Mean | 58.60 | 19.49 | 21.91 |
| | N | 146 | 146 | 146 |

Comparing these estimates with analysis from the GLA Town Centre Health Check report, 2009 (Table Q4); there is a marked difference in views of how the town centres are accessed and suggests an overestimate of the proportion of visits by private cars and a significant underestimate of number of shoppers walking or cycling to the town centres.

Table Q4

| Centre | % of weekday trips to town centre | | | |
|-----------------|-----------------------------------|------|-------|---------|
| | Bus or Tube | Car | Cycle | Walking |
| Wood Green | 43.3 | 11.3 | 0.5 | 44.9 |
| Crouch End | 18.8 | 23.5 | 10.9 | 46.8 |
| Green Lanes | 39.4 | 33.0 | 0.0 | 27.6 |
| Muswell Hill | 12.4 | 40.5 | 0.0 | 47.1 |
| Tottenham | 34.1 | 26.4 | 0.0 | 39.5 |
| West Green Road | 20.0 | 19.0 | 0.0 | 61.0 |

Note: The data is from London Travel Demand Survey [September 2005- March 2008]. Data are for trips with either an origin or destination wholly within the town centre

Question 5 asked businesses to report the nature of any comments made by customers about parking issues. Crouch End businesses were most likely to report customers as complaining about the time taken to find a parking space; while Green Lanes businesses were much more likely to refer to customer complaints about excessive parking charges. In Muswell Hill the reports were often about the often lengthy time taken to find a space as well as excessive charges.

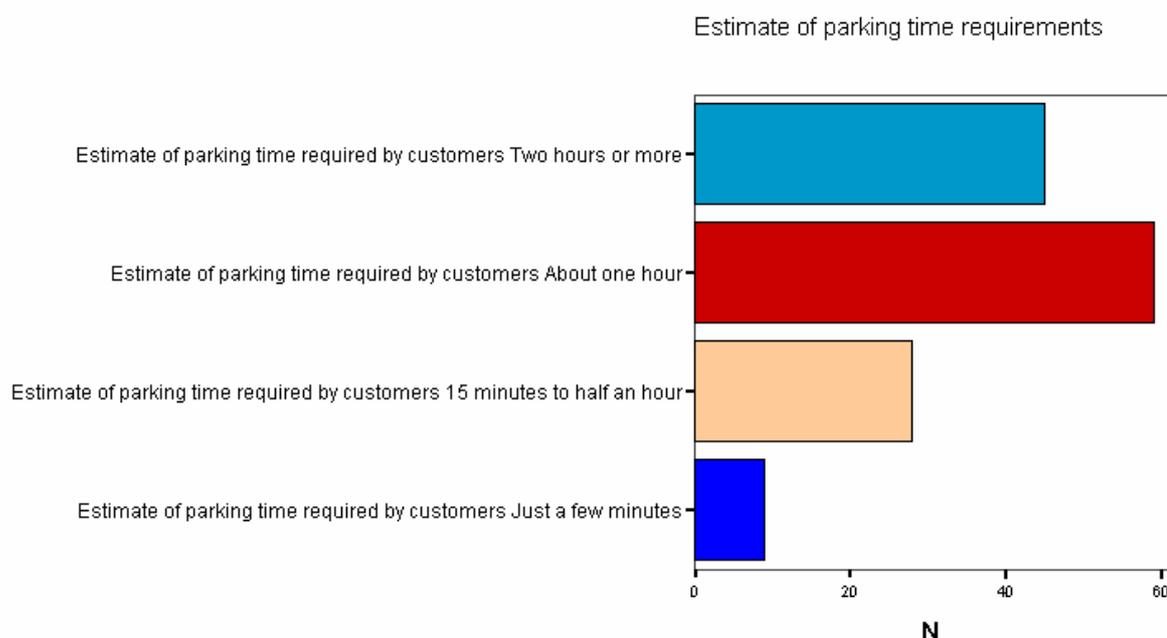
The survey of visitors asked a similar question to those coming in by car and respondents gave broadly similar views to those set out in the table Q5. The views of visitors are analysed later in this report.

Table Q5

| | | Location of business | | |
|--|---|------------------------------------|-------------|--------------|
| | | Harringey Green Lanes Muswell Hill | | |
| | | Crouch End | Green Lanes | Muswell Hill |
| | | % | % | % |
| Comments reported by businesses | Takes too long to find a space | 68% | 46% | 56% |
| | Inconvenient not being able to park for more than 2 hours | 32% | 21% | 38% |
| | Not enough Pay and Display bays conveniently located | 10% | 24% | 13% |
| | Excessive pay and display parking charges | 37% | 71% | 56% |
| | Not enough parking spaces close to all the shops/restaurants | 22% | 13% | 10% |
| | Lack of clear signs about where they can park and for how long | 15% | 14% | 8% |

Question 6 asked businesses how long their customers coming in by car generally needed to park for. Detailed results are set out in Table Q6a after a graphical summary overview

Summary overview – estimates provided by businesses



Summary overview – times stated by visitors for parking

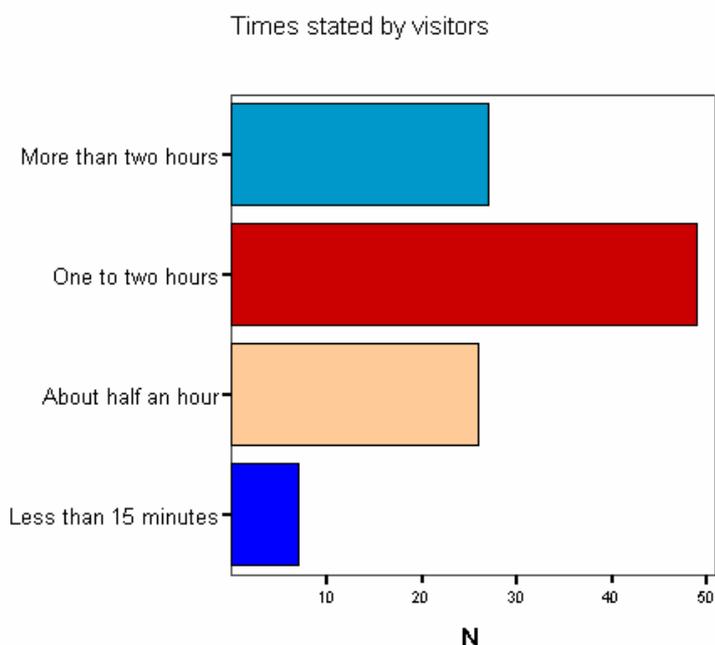


Table Q6a

| | | Location of business | | | | | |
|--|----------------------------|----------------------|-----|-----------------------|-----|--------------|-----|
| | | Crouch End | | Harringay Green Lanes | | Muswell Hill | |
| | | Count | % | Count | % | Count | % |
| Estimate of parking time required by customers | Just a few minutes | 4 | 10% | 5 | 8% | 0 | 0% |
| | 15 minutes to half an hour | 5 | 12% | 18 | 29% | 5 | 14% |
| | About one hour | 18 | 43% | 22 | 35% | 19 | 51% |
| | Two hours or more | 15 | 36% | 17 | 27% | 13 | 35% |

Table Q6a sets out the assessments provided by businesses. When visitors were asked how long they needed to park for the responses showed some differences (Table Q6b). Thus Crouch End and Muswell Hill businesses significantly underestimated the proportion of their customers who only want to park for around 30 minutes, while Green Lanes businesses significantly overestimated this proportion.

Table Q6b

| | | Local centre | | | | | |
|----------------------------------|----------------------|--------------|-----|-----------------------|-----|--------------|-----|
| | | Crouch End | | Harringay Green Lanes | | Muswell Hill | |
| | | Count | % | Count | % | Count | % |
| How long do you need to park for | Less than 15 minutes | 1 | 5% | 4 | 9% | 2 | 5% |
| | About half an hour | 5 | 26% | 7 | 15% | 14 | 33% |
| | One to two hours | 9 | 47% | 22 | 47% | 18 | 42% |
| | More than two hours | 4 | 21% | 14 | 30% | 9 | 21% |

What is clear from the survey is that while the modal (most frequently occurring) demand for parking is between 1 and 2 hours, there is also very significant demand for short stay parking of up to 30 minutes.

Question 9 asked businesses to say how many of their staff drive in to work. Results are shown in terms of average numbers of staff driving in to work in each town centre.

Report

| Location of business | Mean | N | Std. Deviation |
|-----------------------|-------------|------------|----------------|
| Crouch End | 2.57 | 42 | 2.318 |
| Harringey Green Lanes | 2.08 | 65 | 1.652 |
| Muswell Hill | 2.26 | 39 | 2.035 |
| Total | 2.27 | 146 | 1.963 |

The average overall is just over 2 members of staff who drive in to work. Crouch End has the highest proportion who drive to work. These numbers are significant in that if, as is quite possible, staff use their own cars rather than sharing, then the amount of parking spaces required by only those businesses who responded to the survey is over 300 spaces.

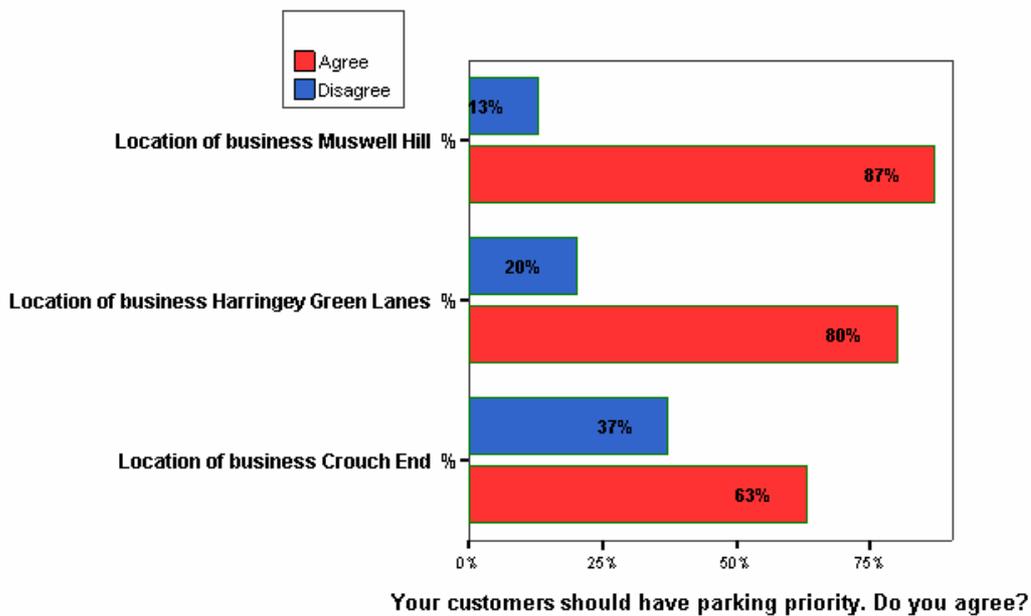
If these proportions are applied to the total of around 600 businesses across all three town centres, then shop and office staff could occupy anything up to 1500 parking spaces in the three town centres. Some of these spaces are in private or other car parks, but most staff park on the street as shown in chart Q10 which shows responses to the question: where do staff park.

Chart Q10



When asked whether or not they agreed that customers should have parking priority; the majority of businesses agreed - as shown in Chart Q11. Interestingly, 37% of businesses in Crouch End do not agree that customers or visitors should have parking priority. 20% of Green Lanes businesses also disagree with the suggestion.

Chart Q11



Question 12 asked businesses to consider how the current economic climate is affecting trade. The results are shown firstly as an overall graphical summary and then in detail in Table Q12.

How is the economic climate affecting business?

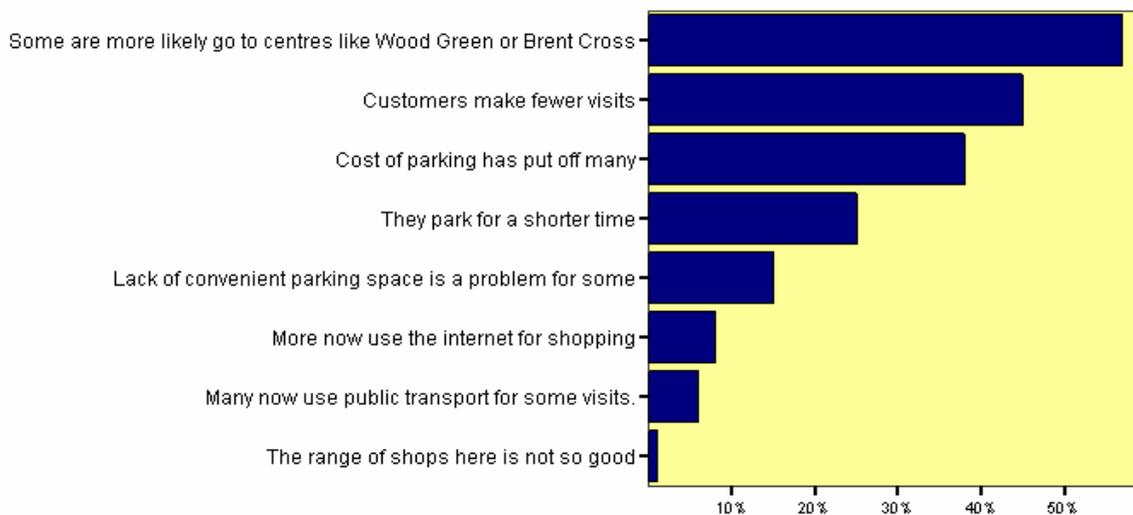


Table Q12

| | Location of business | | |
|---|----------------------|-----------------------|--------------|
| | Crouch End | Harringey Green Lanes | Muswell Hill |
| | % | % | % |
| Some customers/visitors are now more likely go to shopping malls like Wood Green or centres like Brent Cross where there is cheaper or free parking | 48% | 67% | 50% |
| Customers now make fewer visits than they did last year | 38% | 47% | 50% |
| Cost of parking has put off many customers and visitors | 33% | 41% | 39% |
| Visitors / customers who drive in park for a shorter time than they used to | 33% | 17% | 29% |
| Shortage of convenient parking space is a problem for customers | 25% | 9% | 13% |
| Many more customers now use the internet for shopping | 8% | 5% | 13% |
| Many customers who used to drive now use public transport (or walk/cycle) for some visits. | 5% | 6% | 5% |
| The range and type of shops in the town centre has changed (e.g. more fast-food outlets) | 3% | 0% | 3% |

Why do your customers chose to come and shop here?

| | Please tell us the name of your business, road name and n... | Location of business | In your view, why do shoppers and visitors choose to come here? |
|----|--|----------------------|--|
| 1 | Broadway Fruiterers, 15 The Broadway. | Crouch End | good service and value for money. |
| 2 | the Broadway | Crouch End | family business and local and friendly |
| 3 | moment to print, 19 Broadway Parade N8 | Crouch End | we are experiencing less and less footfall in our area |
| 4 | W Nodes Funeral Directors, 2 Broadway Parade N8 | Crouch End | convenience and specialist service provide. |
| 5 | Parnes and partners solicitors, 30 Broadway Parade | Crouch End | |
| 6 | The Broadway N8 8DU | Crouch End | Family business and local and friendly service |
| 7 | A Spandu Electrical market, 17 Broadway Parade N8 | Crouch End | nobody come to Crouch End for shopping any more unless they need something quickly and small |
| 8 | Barnes & Ptnrs 30 Broadway Pde | Crouch End | |
| 9 | Dr Zhang clinic, 53 the Broadway N8 | Crouch End | |
| 10 | Newton and Garner 47 Topsfield Parade, Crouch end | Crouch End | My client come mainly to see me |

| | | | |
|----|---|------------|---|
| 11 | Crouch End Food Centre, 34 - 35 Broadway Parade, N8 | Crouch End | |
| 12 | The Red shoes, 30 Topsfield Parade | Crouch End | I provide a specialist service and Crouch end used to be famed for his excellent independent shops. They are now all doing badly and it will all close, included me within two years if nothing changes |
| 13 | Field, Topsfield Parade N8 | Crouch End | crouching his unique shopping area and has very few shops. Different from the normal. |
| 14 | Property Net, 49 Topsfield Parade N8 | Crouch End | like the area |
| 15 | M & L Carpets | Crouch End | most of our customers are recommended to us we are specialist trade. |
| 16 | Soup Dragon 27 Topsfield Parade | Crouch End | |
| 17 | Martyn Gerrard estate agent, 45 the Broadway N8 | Crouch End | independent shops, bars, restaurants give a unique feel and higher quality in general. |
| 18 | Hornsey Agency 7 Topsfield parade N8 | Crouch End | it's village atmosphere, the stores are often local and independent |
| 19 | Virgin active 31 Topsfield parade | Crouch End | local shops and parks |
| 20 | oxygen | Crouch End | Love the community and they want to support |
| 21 | Eden Ltd 8 Topsfield parade N8 | Crouch End | there is a good mix of independent shops, Restaurants Which Provide a Pleasant Shopping Experience but Parking Is Limited |
| 22 | Indish , 16 Broadway Parade, N8 9DE | Crouch End | diversity of independent shops |
| 23 | Broadway Dry Cleaners , 54 The Broadway N8 | Crouch End | The variety of independent high quality retail shops not found elsewhere |
| 24 | Minikin, 22 Broadway parade | Crouch End | it's a village feel and customers like to support the local shops. We offer a unique service not available anywhere else |
| 25 | O'S Thai Cafe 10 Topsfield Parade | Crouch End | because they live locally they can walk to shops and restaurants |
| 26 | Roxanne, 57 The Broadway | Crouch End | they drive to Brent Cross of Westfield's, no parking tickets |
| 27 | Freeman the Butcher, 9 Topsfield parade N8 | Crouch End | lots of good quality food shops Artisan bakers organic butchers etc |
| 28 | C.H.LIM Opticians, 16 Topsfield Parade N8 | Crouch End | smaller shopping centre |
| 29 | Orange | Crouch End | there are lots of little independent stores which are appealing to shoppers |

| | | | |
|----|--|----------------------|---|
| 30 | Junk & Disorderley Park Road N8 8JJ | Crouch End | good variety small shops, no big chains |
| 31 | Perfection Nails and Beauty, 8 Broadway Parade | Crouch End | lots of individual shops |
| 32 | Oliver Bonas, 3 The Broadway N8 | Crouch End | because local independent shops for Also give their weekly food shop as there is such a variety of shops |
| 33 | Hair On The Heel, 22 Crouch End Hill | Crouch End | To help support local businesses in the places they live or else they drive-through ghost towns for the customer service we can offer Tesco |
| 34 | Santander,5 The Broadway Crouch End | Crouch End | village line, different shops, more beauty, not a chain area |
| 35 | Santander, 3-5 the Broadway N8 | Crouch End | coffee shops, shopping etc. And banking with high street banks |
| 36 | kinleigh Folkard and Hayward | Crouch End | Crouch end feels cafes and boutique that are exclusive C.E |
| 37 | Reena pharmacy, 14 Crouch End Hill | Crouch End | shoppers used to love coming and shopping in Crouch end but now this parking restrictions makes them go to Wood Green or better Brent Cross |
| 38 | Satay Malaysia, 10 Crouch End Hill N8 | Crouch End | local and less crowded |
| 39 | Michaels Barbers, 38 Topsfield parade N8 | Crouch End | Crouch end has a village fill, has everything shoppers need |
| 40 | made to measure express 5 Broadway Parade N8 | Crouch End | the friendly village like atmosphere, the parking is a massive issue and we have seen footfall since you made the changes |
| 41 | Aziza Boutique, 27 Fortis Green Road N10 | Crouch End | they love the uniqueness of Muswell Hill shops |
| 42 | Links Broadway parade | Crouch End | I think it's because Crouch and has a good reputation |
| 43 | Mezzo Foods Ltd, 493-491 Green Lane N4 | Haringey Green Lanes | our business sell veg-greens fruits cheaper and good quality all time of the year. Price and quality and better |
| 44 | OAS Accounting Ltd, 51 Glenwood Road N15 GL | Haringey Green Lanes | |
| 45 | Ada centre limited, 41 grand Parade GL | Haringey Green Lanes | writing quality of restaurants and shops, good value for money on products and services. Multicultural friendly shops. |
| 46 | Sams chickens GL | Haringey Green Lanes | |
| 47 | N4 Cafe, 351 green lanes N4 1DZ | Haringey Green Lanes | because they can have anything in Haringey shops, restaurants, cafes at any time |
| 48 | Parade Chemist 25 Grand Parade N4 | Haringey Green Lanes | The personal service is very satisfactory it is convenient |

| | | | |
|----|---|----------------------|--|
| 49 | Deniz Jewellery, 415 Green Lanes | Haringey Green Lanes | Cheap and quality products many selections to eat and shop |
| 50 | Rostos Ltd, 44 Grand Parade GL | Haringey Green Lanes | |
| 51 | Zavi's Fried chicken, 527 Green Lanes N4 | Haringey Green Lanes | multi choice restaurants |
| 52 | Gokynzy restaurant, 26-27 Grand Parade N4 | Haringey Green Lanes | restaurants and shops of the main attraction. It's different from other centres. |
| 53 | Mertotex London GL | Haringey Green Lanes | culture, something different specialist shops, quality restaurant shopping |
| 54 | Vizyon Optik 527 Green Lanes | Haringey Green Lanes | they used to come here but now parking is too expensive |
| 55 | Santander UK plc card 141 | Haringey Green Lanes | It's local to where they live - inconvenient to go to Wood Green or further away. Also a community who understand the language |
| 56 | Dostlar supermarket | Haringey Green Lanes | Variety of shops and reasonable price for shoppers |
| 57 | the optical shop | Haringey Green Lanes | familiarity, local and convenience. Our customers are also loyal and choose to return, however some are being put off by the parking charges |
| 58 | Green Lanes Haringey N4 GL | Haringey Green Lanes | due to the lack of long-term most visit Haringey to gamble, use estate agent |
| 59 | Antep Baklavasi 24 Grand Parade N4 1LG | Haringey Green Lanes | good quality cakes and Baclavas |
| 60 | Akbas, Kumuncu 463 green lanes N4 | Haringey Green Lanes | lots of Turkish jewellers and restaurants which they can't find elsewhere |
| 61 | Tao Sports card 142 | Haringey Green Lanes | We're conveniently located 'en route' to the west End and central London |
| 62 | Nafsikas Taverna, 499 Green Lanes N4 | Haringey Green Lanes | long-time customers good quality food and services |
| 63 | Ozcan Jewellery uk 383 Green lanes N4 | Haringey Green Lanes | |
| 64 | CAN GB Ltd, 391 Green Lanes N4 1E3 | Haringey Green Lanes | the best Turkish restaurants are based in this location with reasonable prices |
| 65 | Antepliler restaurant, 46 Grand Parade | Haringey Green Lanes | |
| 66 | Cafe Lemon, 28 Grand Parade N4 | Haringey Green Lanes | Green lanes is at the centre, interesting cultural restaurants, special road |
| 67 | Re-style | Haringey Green Lanes | we have been here for a while and have built up a loyal customers. We provide very good service and customer care. |
| 68 | Icut Gents Hair Saloon | Haringey Green Lanes | Because we have best customer service and we do best for them much as we can. |

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|----|--|-------------------------|---|
| 69 | Apollo 77 Grand Parade N4 | Haringey Green Lanes | variety of shops |
| 70 | Daves News Agents, 68 Grand Parade N4 GL | Haringey Green Lanes | yes because they get all this from our parade |
| 71 | Medlocks / Lightplan 60-60a Green Lanes N8 0RE GL | Haringey Green Lanes | For the quality of shops. People fromn all over N London want to come to our shop |
| 72 | Disney's Ltd, 34-35 Grand Parade N4 GL | Haringey Green Lanes | at present we have no idea, apart from the increase in costs that we have spent on advertising |
| 73 | Med - Chem GL | Haringey Green Lanes | The service Haringey traders are providing is the best that's why |
| 74 | Raising my voice foundation, 473 Green Lanes | Haringey Green Lanes | restaurants high-volume bedsits land, people's receipt of benefits. |
| 75 | Kricoss, 58 grand Parade GL | Haringey Green Lanes | in Haringey there is everything people need food, clothing, Sainsbury's, Homebase and one stop shop |
| 76 | London care homes Ltd 439 Green Lanes | Haringey Green Lanes | |
| 77 | Manor house dental surgery, 363 green lanes | Haringey Green Lanes | |
| 78 | Leader Enterprises Ltd, 46 grand Parade | Haringey Green Lanes | the shops are better than another place so everyone will be choosing Haringey if parking fees cheaper than three pounds hour. |
| 79 | Occam Ltd 47 grand Parade | Haringey Green Lanes | because this shop is the best one in Haringey |
| 80 | Devran Restaurant, 485-487 Green Lanes | Haringey Green Lanes | high number of restaurants cafes, good value for money |
| 81 | Yasar Foods LTD, 495 Green lanes N4 | Haringey Green Lanes | Yasar Halim big name in Haringey- traditional bread unique original bakery in North of London that's why businesses choose to come here |
| 82 | Winkworth | Haringey Green Lanes | Restaurant shops business transport links |
| 83 | Kings group estate agents, 39-14 grand Parade N4 | Haringey Green Lanes | it is mainly to use this Suppliers not found elsewhere |
| 84 | Petrou law partnership, 21 Grand Parade | Haringey Green Lanes | |
| 85 | Pizza - Hut uk ltd Delivery and take-away | Haringey Green Lanes | Traditional shops bars and restaurants . Good value for money deals fruit and veg shop |
| 86 | The garden Ladder, N4 1AL | Haringey Green Lanes | it is close by |
| 87 | Turnam Jewellers, 2 grand Parade N4 1JX GL | Haringey Green Lanes | |

| | | | |
|-----|--|-------------------------|---|
| 88 | Onur jewellers, 453 green lanes | Haringey Green Lanes | the common area for jewellers |
| 89 | Akasya Ltd, 431 green lanes GL | Haringey Green Lanes | |
| 90 | Semra , Hair and beauty salon, 337 Green Lanes N4 1DZ GL | Haringey Green Lanes | because foods are so tasty and it is in the main area |
| 91 | Brian Thomas, 66 Grand Parade, N4 | Haringey Green Lanes | Convenient if they walk or use public transport |
| 92 | D.P. Mark chemist, 4 Grand Parade N4 GL | Haringey Green Lanes | They like centre put off by parking charges |
| 93 | The Gold Bar, 79 grand Parade N4 | Haringey Green Lanes | because we do something different |
| 94 | Evkur, 3 Grand Parade N4 1JX GL | Haringey Green Lanes | |
| 95 | Komsu restaurant, 434 St Anns Road N15 3JH | Haringey Green Lanes | |
| 96 | Cherie hair salon, 455 Green Lane N4 | Haringey Green Lanes | value and quality for shopping , friendly shops and it has been known for many years as cosmopolitan shopping |
| 97 | Anthos Florist, 601 green lanes N8 0RE GL | Haringey Green Lanes | only for restaurants of fruit and veg |
| 98 | Archgate Solicitors, 345 green lanes N4 GL | Haringey Green Lanes | restaurants and other shopping |
| 99 | News and Mags,459 Green Lane N4 | Haringey Green Lanes | local Turkish food, good price and longer opening hours. |
| 100 | Antep Ocakbasi, 52 grand Parade | Haringey Green Lanes | Haringey has expanded over the past few years, it is now the central location for all customers who want to eat Turkish food |
| 101 | Ora Cafe, 581 Green Lanes N8 | Haringey Green Lanes | quality of service and staff |
| 102 | Ladbrokes, 56 Grand Parade | Haringey Green Lanes | market competition, increased buyers powers |
| 103 | Kinas solicitors, 393 Green Lanes N4 | Haringey Green Lanes | variety of shops in the area, reputation of the green lanes, friendly service by the shops |
| 104 | Lynbo. 457 Green Lanes, Harringey N4 | Haringey Green Lanes | |
| 105 | Mezzo Bar, Restaurant | Haringey Green Lanes | There is a variety of restaurants and customers have a choice |
| 106 | Coco Hair studio,437 Green lanes | Haringey Green Lanes | the only visit if they desperately in need of something, they will prefer other places on the parking is a great problem within the area. |
| 107 | Lido Housewares, 481-479 Green Lanes | Haringey Green Lanes | Haringey has a large variety of stores for restaurants hardware and household stores to supermarkets. Harringey provides affordable shopping school locals. |

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|-----|---|--------------|---|
| 108 | Kate Kuba Shoes 71 Muswell Hill Bdy | Muswell Hill | |
| 109 | Robert opticians 11 Fortis Green Road | Muswell Hill | the practice is not close to tube lines, good bus service. Give them come there to do so because they live locally, by recommendation |
| 110 | snap happy 394 Muswell Hill Broadway N10 | Muswell Hill | |
| 111 | Colin Jewellers 225 Muswell Hill Broadway | Muswell Hill | because of the locality |
| 112 | Panoptica Ltd,150 Muswell Hill Broadway | Muswell Hill | local and independent shops |
| 113 | Oxfam, 233 Muswell Hill Broadway | Muswell Hill | Muswell Hill has a village, said crime rate lowish Cure change shore shops |
| 114 | Woods and Woods | Muswell Hill | the variety of unusual independent shops and multiples. |
| 115 | Sally Bourn Interiors, 26 Muswell Hill Broadway N10 | Muswell Hill | good range of shops independently retailers and proximity to their home |
| 116 | 225 Jewellery Muswell Hill Bdy N10 1DE | Muswell Hill | |
| 117 | The Jewellery, 22 5 Muswell Hill Broadway N10 | Muswell Hill | |
| 118 | Muswell Hill,3 Muswell Hill Broadway N10 | Muswell Hill | |
| 119 | Fabric menswear, 34 Fortis Green Road, London | Muswell Hill | because Muswell Hill has most independent shops and restaurants. |
| 120 | GNC 243 Muswell Hill BDY | Muswell Hill | |
| 121 | Destination skin, 22-24 the Broadway | Muswell Hill | it has a wider choice of shops |
| 122 | Robert Bale Jewellers & Engravers, 486 Muswell Broadway | Muswell Hill | Choice of individual independent retailers |
| 123 | Royals, 119 Muswell Hill Road | Muswell Hill | independent and specialised shops. |
| 124 | W Martyn | Muswell Hill | W. Martyn is a unique shop. We opened in 1897, came to Muswell Hill just to see one shop. Their concern is the cost of parking. So they know longer come so often |
| 125 | "N/A as we are not a shopping centre" | Muswell Hill | good quality service |
| 126 | Goldilocks Muswell Hill Broadway | Muswell Hill | local to their home has the necessary shops and stores they require |

| | | | |
|-----|---|--------------|--|
| 127 | Perfect smile 438 Muswell Hill Broadway N10 | Muswell Hill | because they are already registered with us |
| 128 | Toffs of Muswell Hill | Muswell Hill | it offers a good selection of shops and restaurants |
| 129 | Tom Foolery, 109 Fortis Green Road N10+ | Muswell Hill | Muswell Hill has a good High Street, Tomfoolery is a destination shop, many people come from out of the area |
| 130 | Cyplon Travel 561-563 Green Lanes N8 0RL card 140 | Muswell Hill | We've been here almost 40 years and have loyal customers |
| 131 | The John Baird Pub, 122 Fortis Green Road N10 | Muswell Hill | yes, as this area is commonly known as a lovely village area. if we cannot arrange better system then all people will do is use other areas to spend their money |
| 132 | travel wise Ltd, 51 Fortis Green Road | Muswell Hill | more independent shops, personal service offered, it is very pretty, clients don't like generic high streets |
| 133 | Oxygene | Muswell Hill | |
| 134 | Bairstow Eves, 36 Muswell Hill Broadway N10 | Muswell Hill | this |
| 135 | Cosi homeworks, 854 Fortis Green Road | Muswell Hill | they want cheaper parking, still independent stops restaurants, architecture news open air strolls with variety of outlets |
| 136 | Neckline Ltd, 164 Fortis Green Road N10 | Muswell Hill | because of the individuality of shops, said will disappear to lack of parking space |
| 137 | Muswell Hill Pharmacy, 110 Fortis Green Road | Muswell Hill | local family atmosphere Muswell Hill is like a little village |
| 138 | Frocks Away | Muswell Hill | Villages feel nice selection of shops independent and destination shop, of products not offered elsewhere. Better customer service more relaxed environment. The parking changes have made a marked difference our trade |
| 139 | John Lewis of Hungerford , 108 Fortis Green Road | Muswell Hill | the range of independent shops, village atmosphere, good transport links |
| 140 | O baby, 126 Fortis Green N10 | Muswell Hill | |
| 141 | New century, Muswell Hill | Muswell Hill | good specialist and friendly shops |
| 142 | H&S Hair & Beauty, 77 Muswell Hill Broadway N10 | Muswell Hill | choice of shops |
| 143 | Planet organic | Muswell Hill | Muswell Hill has a nice village like atmosphere with not many charms of retailers and the small businesses need every customer to service. |
| 144 | Mint Velvet, 172-174 Muswell Hill Broadway | Muswell Hill | gift shops, coffee shops family atmosphere |
| 145 | Bones, 253 Muswell Hill Broadway N10 | Muswell Hill | Boutique and individual shops, not chains local village fill to the area wanting to support local independent shops. |

| | | | |
|-------|-----------------------------------|--------------|----------------|
| 146 | Moss, 27 Muswell Hill Broadway | Muswell Hill | its local area |
| Total | 146 | 146 | 146 |

DATA ANALYSIS 2: THE VISITOR / CUSTOMER PERSPECTIVE

A total of 113 responses were received from customers / visitors who had driven to each local town centre on days when the survey questionnaire was distributed. Table Q1 has the detail by town centre location

| | Count | % |
|--------------------------------|-------|------|
| Local centre Crouch End | 22 | 19% |
| Harringay Green Lanes | 47 | 42% |
| Muswell Hill | 44 | 39% |
| Total | 113 | 100% |

Question 2 asked visitors to each of the three local town centres what town centres or shopping centres they mainly used.

Those in Crouch End also use Muswell Hill (41%), Brent Cross (32%) and Westfield (18%). Green Lanes visitors also use Wood Green (32%) but otherwise their loyalties are split more or less evenly between the Arena centre, Tottenham and Seven Sisters, Brent Cross and Westfield.

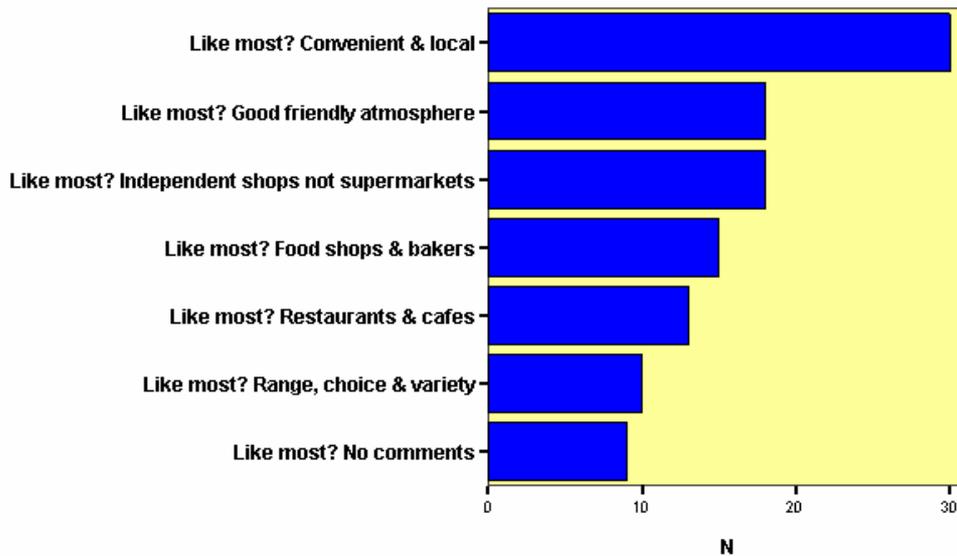
Muswell Hill visitors are much more likely (than visitors to the other town centres) to go to Brent Cross (52%) and Crouch End (39%).

It is clear that ease and distance of travel are significant factors when making choices of shopping destination. For Green Lanes visitors, Wood Green is a short bus ride away.

| | Local centre | | |
|---------------------|--------------|-------------|--------------|
| | Harringay | | |
| | Crouch End | Green Lanes | Muswell Hill |
| | % | % | % |
| Green Lanes | 9% | 94% | 7% |
| Muswell Hill | 41% | 2% | 93% |
| Wood Green | 18% | 32% | 16% |
| Arena Centre | 0% | 11% | 2% |
| Tottenham 7 Sisters | 5% | 11% | 0% |
| Brent Cross | 32% | 13% | 52% |
| Harlequin | 0% | 2% | 0% |
| Westfield | 18% | 11% | 5% |
| Bluewater | 0% | 2% | 0% |
| Lakeside | 0% | 2% | 0% |
| Crouch End | 91% | 9% | 39% |
| Other | 0% | 0% | 0% |

Question 3 asked visitors what attracted them to the local town centre. Views are summarised in the chart below, and are set out in detail in Table Q3.

What do you like most about coming here?



The main attraction for visitors and shoppers is that their town centre is indeed local and very convenient for them. They also like the friendly community atmosphere and the fact that many shops are independent and offer a wide range of interesting products.

Also popular are the food shops, bakers, cafes and restaurants. Several visitors commented on the pleasure of walking around in the open rather than in an enclosed mall or shopping centre.

Table Q3

| | Local centre | | |
|------------------------------------|--------------|-------------|--------------|
| | Harringay | | |
| | Crouch End | Green Lanes | Muswell Hill |
| | % | % | % |
| Convenient & local | 18% | 19% | 39% |
| Good friendly atmosphere | 14% | 15% | 18% |
| Independent shops not supermarkets | 23% | 11% | 18% |
| Food shops & bakers | 14% | 23% | 2% |
| Restaurants & cafes | 14% | 15% | 7% |
| Range, choice & variety | 14% | 9% | 7% |
| No comments | 5% | 9% | 9% |

The 'convenient and local' factor is most apparent in Muswell Hill, while Crouch End visitors are most likely to value the independent stores. Green Lanes visitors particularly value the speciality food shops and bakers. However it is the combination of all these attributes which are widely appreciated by visitors.

Question 4 asked visitors what they liked least about driving in to the town centre. The main issues were lack of space, difficulty parking and the cost of parking. Details are given in Table Q4

Table Q4

| | | Local centre | | |
|-------------|------------------------------------|--------------|-------------|--------------|
| | | Harringay | | |
| | | Crouch End | Green Lanes | Muswell Hill |
| | | % | % | % |
| Like least? | Lack of space / difficulty parking | 36% | 38% | 43% |
| | Cost of parking | 36% | 49% | 39% |
| | Too much traffic | 5% | 9% | 5% |
| | Longer stay time needed | 5% | 0% | 2% |
| | Too many downmarket shops | 14% | 2% | 5% |
| | No comments | 5% | 2% | 7% |

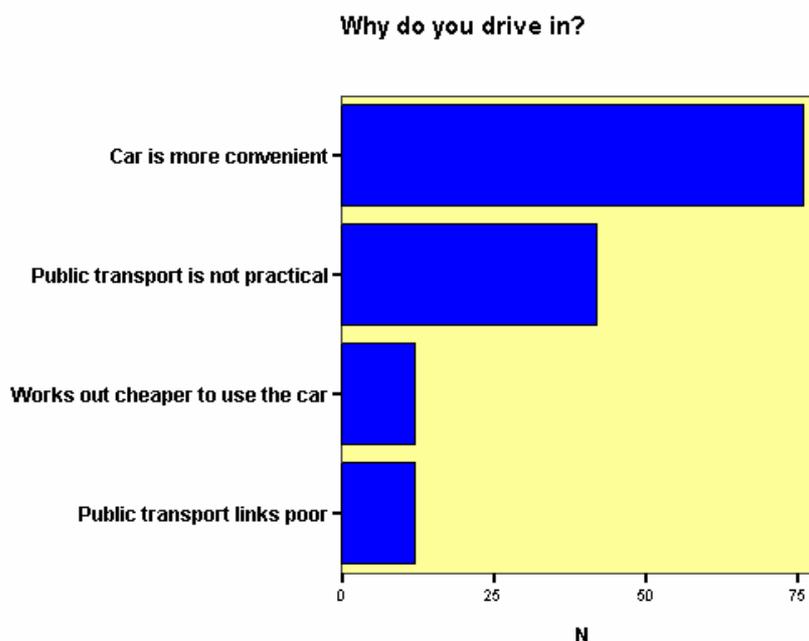
Q6 asked visitors what they thought the Council could do to help. Their suggestions were to cut parking charges and provide more spaces on road and in car parks. Green Lanes visitors were more concerned to have charges reduced, while Crouch End visitors wanted more parking spaces.

Question 7 asked visitors how frequently they come in to the town centre. Frequency of visits is fairly consistent across the three centres with a large majority coming in more than three times per week.

Table Q7

| | | Local centre | | |
|--|--------------------|--------------|-------------|--------------|
| | | Harringay | | |
| | | Crouch End | Green Lanes | Muswell Hill |
| | | % | % | % |
| How frequently do you come to this town centre | Most days | 55% | 49% | 50% |
| | Weekly | 23% | 32% | 32% |
| | About once a month | 18% | 19% | 18% |
| | Other | 5% | 0% | 0% |

When asked why they drive in to the town centre, most visitors comment it is more convenient. Several pointed out they were on their way to or from work. Views on this subject are consistent amongst visitors to all three town centres



Questions about parking here today

Visitors were asked several questions about parking experiences:

1. The time taken to drive in
2. How long they needed to park for
3. How easy it is generally to find a parking space
4. How long it took to find a space today

Responses to these four questions are set out in the tables below

| | | Local centre | | |
|---------------------------------|------------------------|--------------|-------------|--------------|
| | | Harringay | | |
| | | Crouch End | Green Lanes | Muswell Hill |
| | | % | % | % |
| Time taken to drive here today? | Less than 15 minutes | 67% | 40% | 68% |
| | 15 - 30 minutes | 17% | 44% | 25% |
| | Longer than 30 minutes | 17% | 16% | 7% |

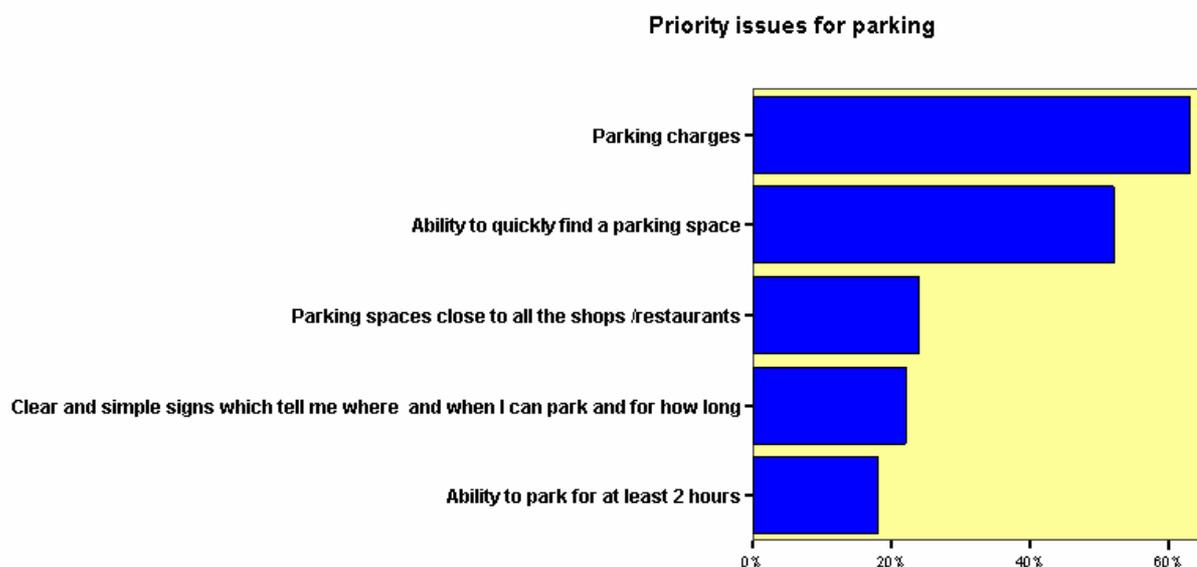
| | | Local centre | | |
|----------------------------------|----------------------|--------------|-------------|--------------|
| | | Harringay | | |
| | | Crouch End | Green Lanes | Muswell Hill |
| | | % | % | % |
| How long do you need to park for | Less than 15 minutes | 5% | 9% | 5% |
| | About half an hour | 26% | 15% | 33% |
| | One to two hours | 47% | 47% | 42% |
| | More than two hours | 21% | 30% | 21% |

| | | Local centre | | |
|--------------------------------------|----------------------------|--------------|-------------|--------------|
| | | Harringay | | |
| | | Crouch End | Green Lanes | Muswell Hill |
| | | % | % | % |
| How easy is it to find a space here? | It's easy | 5% | 17% | 5% |
| | I can usually find a space | 21% | 35% | 39% |
| | It's difficult | 74% | 48% | 57% |

| | | Local centre | | |
|--|------------------------------|--------------|-------------|--------------|
| | | Harringay | | |
| | | Crouch End | Green Lanes | Muswell Hill |
| | | % | % | % |
| How long did it take find a P & D space today? | Quickly - just a few minutes | 42% | 60% | 59% |
| | About 10 minutes | 37% | 36% | 24% |
| | Longer than 15 minutes | 21% | 4% | 17% |

Questions to visitors about parking priorities

While visitors identify charges as a single priority issue; this is significantly outweighed by the combined desire to find a space quickly and which is close to the shops they want to visit and the need for good signage.



| | Local centre | | |
|---|--------------|-------------|--------------|
| | Harringay | | |
| | Crouch End | Green Lanes | Muswell Hill |
| | % | % | % |
| Ability to quickly find a parking space | 65% | 43% | 57% |
| Parking charges | 55% | 83% | 45% |
| Ability to park for at least 2 hours | 20% | 11% | 25% |
| Parking spaces close to all the shops /restaurants | 15% | 30% | 23% |
| Clear and simple signs which tell me where and when I can park and for how long | 25% | 11% | 32% |

Visitors were asked to comment about the need for parking charges as a means of ensuring space is available when needed. Their comments are listed below

Parking charges are necessary to ensure availability of parking space

| | Local centre | No one likes paying parking charges but if parking was free..... |
|---|--------------|---|
| 1 | Crouch End | |
| 2 | Crouch End | Charges OK but availability is really poor. I now have to do more work with my clients at night |
| 3 | Crouch End | Allow parking from 9am and have cheaper rates |
| 4 | Crouch End | Happy to pay something but it is the lack of parking space which is the main issue |

| | | |
|----|-----------------------|--|
| 5 | Crouch End | Parking should be free for a limited period - for local residents only |
| 6 | Crouch End | It was no more difficult to find a parking space in Muswell Hill before the charges increased |
| 7 | Crouch End | Agree with need to pay but the cost is the issue |
| 8 | Crouch End | Loss of independent shops incl Prospero, Joy and Verdant. Too many cafes and too few decent restaurants. Concern that supermarkets will destroy local shops like butchers and quality food shops |
| 9 | Crouch End | Please can you introduce telephone paying |
| 10 | Crouch End | Free parking for 1 hour. Tickets could be purchased on arrival with first hour free. 10p minimum fee |
| 11 | Crouch End | Issue Crouch End residents with ticket priority to park in area |
| 12 | Crouch End | |
| 13 | Crouch End | Agree that charges are necessary but they are far too expensive |
| 14 | Crouch End | Free parking for 1 hour to shop. Tickets for longer times. It's not rocket science. You still have small businesses which are good for community and localism. Lose this and you lose all that makes us human rather than robots |
| 15 | Crouch End | More parking is essential, fees is not the issue |
| 16 | Crouch End | You would get more people if shopping was free |
| 17 | Crouch End | Walter Purkiss, Bons, fishmongers, Broadway Fruiterers, Bishops the ironmonger, Freemans Butchers, Waitrose, M & S. |
| 18 | Crouch End | A free 2 hour parking slot would encourage more people into the area |
| 19 | Crouch End | |
| 20 | Crouch End | Have designated parking for shoppers with charges redeemable at shops. You will kill all trade if you continue as is |
| 21 | Crouch End | I just think the meter prices should be reduced |
| 22 | Crouch End | In some conditions certain people could be exempt |
| 23 | Harringay Green Lanes | |
| 24 | Harringay Green Lanes | We come on Sunday because it is free |
| 25 | Harringay Green Lanes | OK don't make it totally free but charge much less |
| 26 | Harringay Green Lanes | Three hours parking should be allowed |
| 27 | Harringay Green Lanes | |
| 28 | Harringay Green Lanes | £1.75 per hour and some free parking daily |
| 29 | Harringay Green Lanes | |
| 30 | Harringay Green Lanes | £1.50 per hour |
| 31 | Harringay Green Lanes | the charges is way too expensive should be £1.50 , £1.75per hour, daily free parking hours |
| 32 | Harringay Green Lanes | 1st hour £1 then £2 per hour after that |
| 33 | Harringay Green Lanes | Parking charges are extremely high in Green Lanes compared to the rest of North London |
| 34 | Harringay Green Lanes | I think that £1.50 per hour is reasonable |
| 35 | Harringay Green Lanes | £1.50 per hour you free parking Saturdays after 1 PM |
| 36 | Harringay Green Lanes | Three pounds for two hours |
| 37 | Harringay Green Lanes | Allocated spaces or workers permits |

| | | |
|----|-----------------------|--|
| 38 | Harringay Green Lanes | £1.75 per hour |
| 39 | Harringay Green Lanes | Agree - but doubling the rates means there will be no shoppers. They will go to other centres |
| 40 | Harringay Green Lanes | Free initial period e.g. 20 mins |
| 41 | Harringay Green Lanes | if you do go ahead with parking charges it should be reduced |
| 42 | Harringay Green Lanes | Make it cheaper please |
| 43 | Harringay Green Lanes | I don't think the staff office workers have that many cars - that cannot excuse charges |
| 44 | Harringay Green Lanes | |
| 45 | Harringay Green Lanes | Introduce parking rebates for shoppers. Shops to offer refund to customers |
| 46 | Harringay Green Lanes | Decrease the space available to residents and CPZ up to 10pm is useless |
| 47 | Harringay Green Lanes | £1.70 per hour Saturday free parking |
| 48 | Harringay Green Lanes | free parking 10 AM to 12 PM daily £1.50 per hour charges |
| 49 | Harringay Green Lanes | |
| 50 | Harringay Green Lanes | £2.00/hour |
| 51 | Harringay Green Lanes | Lower the charges to about £1 per hour |
| 52 | Harringay Green Lanes | Increasingly I'm finding it difficult to carry out my shopping in this area and will eventually stop visiting. Shoppers are most definitely deterred for the parking problems. Without help, the shopping area will suffer |
| 53 | Harringay Green Lanes | |
| 54 | Harringay Green Lanes | more hours to park |
| 55 | Harringay Green Lanes | Parking charges should be reduced |
| 56 | Harringay Green Lanes | Parking could be limited to 2 hours but tickets made cheaper. Shop staff and commuters etc. then wouldn't want to use them |
| 57 | Harringay Green Lanes | I don't expect it to be free but do want it reasonably priced - not like robbery |
| 58 | Harringay Green Lanes | Don't need free parking but it would be good if cheaper. We used to come a lot at night when it was very active. Now after 9pm the roads are empty - too quiet |
| 59 | Harringay Green Lanes | |
| 60 | Harringay Green Lanes | £6 /hour is very expensive. As parking meters are so expensive nowadays |
| 61 | Harringay Green Lanes | Increase business bays. Swap business bays within the 'Gardens' for free parking |
| 62 | Harringay Green Lanes | 1. Reasonable charges 2. No return for 2or 3 hours 3. Vouchers for shopkeepers allowing them to attract business |
| 63 | Harringay Green Lanes | If the prices are reasonable I doubt there will be any problem |
| 64 | Harringay Green Lanes | £1.50 per hour |
| 65 | Harringay Green Lanes | Have cheaper prices or some customer permit scheme |

| | | |
|-----|-----------------------|--|
| 66 | Harringay Green Lanes | I do not agree the parking should be free but not too expensive either, maximum charge should not be more than £1.20 per hour |
| 67 | Harringay Green Lanes | two pounds an hour |
| 68 | Harringay Green Lanes | You are right. Make residential streets free so that commuters can park in side roads |
| 69 | Harringay Green Lanes | I don't want it to be free - I want the charges to be more reasonable |
| 70 | Muswell Hill | To stop this have a time e.g. 11-12 when parking is restricted - solves the problem |
| 71 | Muswell Hill | £3 for one hour is a lot - give local people a discount |
| 72 | Muswell Hill | I need to use disabled space |
| 73 | Muswell Hill | £1 for 20 minutes is more expensive than central London. This cannot be right |
| 74 | Muswell Hill | |
| 75 | Muswell Hill | Keep the car parks cheap. Keep short term on street. Things are fine as they are. Thanks for Source London EV in Muswell Hill & Crouch end behind Waitrose. Well done! |
| 76 | Muswell Hill | Make it free |
| 77 | Muswell Hill | |
| 78 | Muswell Hill | I agree to paying for parking but this is too expensive |
| 79 | Muswell Hill | Parking doesn't need to be free all day - just for 30 mins |
| 80 | Muswell Hill | I agree wholeheartedly. Have a special 20 minute rate for quick shopping |
| 81 | Muswell Hill | Could have one hour free parking - as seen in some other town centres |
| 82 | Muswell Hill | The charges are too high - s/be reduced. Charity shops have increased - there are too many and they reduce the diversity of shops |
| 83 | Muswell Hill | Lower them |
| 84 | Muswell Hill | Only pay between 10 - 12 to stop commuters and shop staff |
| 85 | Muswell Hill | One needs at least 2 hours to enjoy the area and shop to help the shops survive. |
| 86 | Muswell Hill | |
| 87 | Muswell Hill | Have first 15 minutes free |
| 88 | Muswell Hill | Allow 30 mins free parking. I don't think the above comment is true |
| 89 | Muswell Hill | Far too many useless boutiques and restaurants. For instance Singers closed down and we got another ice cream shop! |
| 90 | Muswell Hill | Free parking for first 30 mins |
| 91 | Muswell Hill | N/A There are more charity shops now. There is a reduced range of shopping |
| 92 | Muswell Hill | |
| 93 | Muswell Hill | Designate parking area purely for shop & office staff who are there all day |
| 94 | Muswell Hill | Simple signage is very important. You could increase parking times and reduce charges |
| 95 | Muswell Hill | |
| 96 | Muswell Hill | Have a free period of, say, 15 minutes |
| 97 | Muswell Hill | |
| 98 | Muswell Hill | Like all of London it's a rip off. £1 for 20 mins is too much but it's the lack of short term spaces that's the problem. Far too much double yellows and too many empty disabled bays (90% unoccupied). Also you should have pelicon crossings instead of zebra to cut congestion. Sort it out!! |
| 99 | Muswell Hill | Need clearer signage - avoid confusion. Lots of shops are closing down which is demoralising and disappointing |
| 100 | Muswell Hill | Parking charges are reasonably accepted |
| 101 | Muswell Hill | Local residents within catchment area should be given a free parking permit for up to 4 hours to do local shopping etc. |
| 102 | Muswell Hill | |
| 103 | Muswell Hill | |

| | | |
|--------------|--------------|---|
| 104 | Muswell Hill | Have shoppers' loyalty card - if you spend more than £200/month in local stores, benefit from free parking. The range of shops here has changed but not as affected as Crouch End where there are lots of empty shop units. |
| 105 | Muswell Hill | £6 for 2 hours is much too much to pay |
| 106 | Muswell Hill | £3/hour is nearly as high as Westminster and double those of other UK towns. |
| 107 | Muswell Hill | I do agree with a pay to park system as it creates a turnover but not at the rate of £3/hour. That is a lot of money. |
| 108 | Muswell Hill | Yes, but the level of charges are astronomical |
| 109 | Muswell Hill | Commuters, shop and office staff take every space at all times. I have a resident permit but on Thursdays, Fridays and weekends I can't get any spaces to park my car. |
| 110 | Muswell Hill | It doesn't need to be free. The charges were reasonable but are now just greedy and inappropriate for the area |
| 111 | Muswell Hill | Charges can seem high but it means I am efficient in my shopping |
| 112 | Muswell Hill | Cheaper rates and more parking space e.g. car parks |
| 113 | Muswell Hill | I don't expect them to be free but they are overpriced -. I would come more often if cheaper parking |
| Total | N | 113 |
| | | 113 |

How has the economic climate affected your visits?

