BMG Research Report

Leicestershire Town and Village Centres Survey
Final Report
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Prepared for:
Leicestershire County Council & Leicester Shire Economic Partnership

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Because people matter.

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1 Executive Summary

Methodology and survey characteristics

- The survey delivered 3,072 responses across 17 town and village centres across Leicestershire, the largest sample being in Loughborough (354 responses), and the smallest in Broughton Astley (79 responses). Responses are distributed over market days and non-market days, Saturdays and weekdays (no interviewing was undertaken on a Sunday), daytime and evenings.

- The survey delivered a broad sample covering all age groups, and with 6.8% non-white respondents. The largest groups in terms of working status were those employed (54%) and those retired (22%). 46% of responses were from men, and 54% from women.

Visiting the town or village centre

- Shopping trips comprised more than half of visits, with a further one in 10 relating to services such as banking. one in 10 worked in the centre, and one in 20 were tourists.

- 55% of respondents arrived in the centre by car, but 27% arrived on foot. One in seven arrived by bus and one in fifty by bicycle.

- Half of visits to centres were less than an hour in length, and a further third between one and three hours, but length of stay was strongly dependent on the size of settlement, with longer visits more likely in larger centres.

- More than a third of respondents visited the centre daily, and nearly another third visited at least twice a week. One in twenty were occasional visitors, and one in fifty are first time visitors. Again, daily visits tended to be more common in smaller centres.

- Two thirds visited the centre only during the day, and most of the rest visited both during the day and the evening – very few visitors only used the centre in the evening.

- A wider range of shops and retail facilities was cited by three-quarters (74%) of respondents as a change that would encourage them to visit the centre more often, with the next most popular changes being free parking (46%), more cultural and entertainment facilities (41%) and more, better or different places to eat and drink (39%). These issues varied in importance from centre to centre, but not significantly between population groups.

- Local newspapers were overwhelmingly the most common way of finding out about events and attractions in the centre – though local billboards, council newspapers and the Internet also had a role. Only a minority (12%) has actually attended a recent event in the centre, these being most commonly carnivals, fairs and specialist markets.

Attitudes towards the centre

- Leicestershire town and village centres were most likely to be described as friendly, with safe, tidy, attractive, and busy also being terms which respondents strongly associated with the centres. At the other end of the spectrum, exciting, quiet, distinctive and vibrant were the least popular terms. Views varied widely from centre to centre.

- Half of respondents felt centres had not improved or worsened in the past year, but whilst a third thought they had improved, and only a tenth thought they had got worse. Assessments vary widely between centres – on balance Thurmaston, Wigston, Market Bosworth, Market Harborough and Ashby have improved most, whilst Shepshed, Earl Shilton and South Wigston have got worse.

- Whilst most thought that the centres served most groups in the population well, there was some concern about the extent to which they served young people well.

- Overall the centres were rated best as places to live, work and shop, and least well rated as centres for leisure and entertainment. Overall centres were rated as good, but not very good. Overall the best centres were thought to be Market Bosworth and Ashby, and the worst South Wigston and Shepshed.

- Overall, 76% were satisfied with the centres as places to shop, visit and do business. Highest levels of satisfaction were recorded for Market Bosworth, Thurmaston, Ashby and Market Harborough, and lowest for Shepshed, South Wigston, Hinckley and Coalville.

- The most widely used services in the centres are shops, banks and building societies, followed by post offices and markets.

- Markets appeared to contribute significantly to local character, and were thought of positively by centre users. Overall markets were thought to have improved in the last year. There was support for more specialist markets, and some concern from a minority about the product range on offer at some markets.

- Nearly half (46%) of respondents believed that centres met their shopping needs well, but a third thought them only adequate, and a fifth felt they fell short. The best were thought to be Syston, Thurmaston, Wigston, Ashby and Loughborough, and the worst, Shepshed, Lutterworth, South Wigston and Earl Shilton. Lack of variety and number of shops were the main concerns.

- Views on the range and quality of places to eat and of pubs, bars and clubs in the centre suggested modest approval, but this varied widely between centres. Market Harborough and Market Bosworth were best regarded, and Thurmaston and South Wigston least well regarded.

- There were positive views about pavement, parks and shop front maintenance, street lighting, pedestrian signage and summer planting in centres. There was some concern about a number of other issues, notably the amount and maintenance of seating in centres, the number and cleanliness of public toilets, and similar concerns about baby changing facilities.

- Respondents were generally positive about ease of road access into centres, road maintenance, road signage for cars, and the ease of finding parking in centres. However, there was general agreement that centres were congested, and some concern about the amount and cost of car parking.

- People tended to feel that centres were places where they did not feel threatened by traffic, but traffic noise was a concern, more so than other sources of noise in the centres. Service in shops and access for disabled and older people were both highly regarded. Some respondents felt that centres needed more high street chains, others that more local independent shops were needed.

- When asked what needed improving in centres, retailing issues were most commonly cited, followed by more cleanliness and tidiness, more leisure facilities and more parking.

Crime and safety

- In general, crime and disorder issues were not perceived as major problems in the centres. The issues most likely to be cited as problems, albeit by a minority of no more than a fifth for any issue, were groups of people hanging round on the streets, rubbish and litter lying around, dirty pavements and chewing gum, and vandalism, graffiti and other deliberate damage to property.

- Only a small minority, 10%, of people were worried about being assaulted or harassed whilst in one of the centres. Those in Thurmaston felt safest, and those in Earl Shilton, Melton Mowbray, Oadby and Shepshed most at risk. 6% of respondents had actually been in a situation where they felt worried in the last year, with concern being greatest in Shepshed, Hinckley and South Wigston.

- Nearly half, 47%, felt police presence should be increased in the centres, 43% thought it to be about right, and 2% thought it should be reduced.

Factor analysis

- Overall satisfaction with a centre is very strongly driven by how satisfied people are with it as a shopping centre. Satisfaction with their role as places to visit, and as centres for leisure and entertainment also drive overall satisfaction very strongly, whilst satisfaction with centres as places to live and work are somewhat less predictive, though still important.

- The strongest drivers of overall satisfaction amongst a host of factors about which the survey gathered information appear to be how attractive the design and layout of the centre is, the condition of pavements, summer planting, the range and quality of places to eat, and the quality of shop front maintenance. In contrast many crime and disorder issues, congestion and traffic noise, and the state of public toilets are all concerns for residents, but do not appear to have any impact on whether or not they are satisfied with a centre.

2 Introduction

This is the main report of work carried out on behalf of Leicestershire County Council and Leicester Shire Economic Partnership, comprising a survey of visitors and users in 17 town and village centres across Leicestershire. This main report is accompanied by 17 shorter reports concentrating on each individual town or village centre.

The purpose of the research was to conduct customer satisfaction research in each of the centres, to inform the establishment of baselines to support the Local Area Agreement work. The intention of the survey has been to understand the issues specific to each settlement with a view to developing action plans for intervention.

Policy Context

Generally speaking, Local Area Agreements (LAA) are contracts between central and local government designed to deliver the priorities of local people, fitting in with the Government's vision for sustainable communities. Indeed, this is a crosscutting theme, which should underpin each of the four LAA blocks:

- Children and Young People;
- Safer and Stronger Communities;
- Healthier Communities and Older People; and
- Economic Development And Enterprise.[1]

The Government and Leicestershire Together[2] approved the County's LAA on 24th March 2006.[3] Working closely alongside seven District-based Local Strategic Partnerships and a range of service delivery agencies in the County, Leicestershire Together took the lead for the preparation of Leicestershire's LAA. An LAA Steering Group of the Chief Officers of these agencies was established where lead officers are identified to lead the development of the agreement in seven themed areas:

- Safer communities;
- Stronger communities;
- Children and young people;
- Older people;

[1] Office of the Deputy Prime Minister (2005) *Local Area Agreements Guidance*
[2] Leicestershire Together is the Local Strategic Partnership (LSP) for the County of Leicestershire
[3] Leicestershire Together (2006) *The Local Area Agreement for Leicestershire Our Mission* www.leicestershiretogther.org/index/local_area_agreements/local_area_agreement_for_leicestershire.htm

- Health;
- Economic development; and
- Cleaner/greener.

Within Leicestershire, the Economic Block consists of five outcomes: employment and skills, business support, tourism and the physical environment. Moreover, the LAA highlights that sustainable economic growth will depend on the quality of employment land and premises that the County has to offer. Along with this, the town and village centres within Leicestershire, which include urban centres such as Loughborough, market and other town centres, and smaller rural centres are vital to Leicestershire's economic prosperity. Thus *investment is required to ensure that these retain and enhance their economic vitality and vibrancy. The economic development block is leading cross-block discussions involving the stronger communities and cleaner/greener on the development of town and village centres with the identification of a priority list of centres being the first fruit of this collaboration.*[4]

The LSEP is a major funder of the Market Towns Programme of the Leicestershire Rural Partnership and as such, the market town research work will be vital to that programme as well as to the LAA, in terms of measuring the effectiveness of intervention. Moreover the LSEP fosters and promotes economic development within Leicester and Leicestershire. The aim of the LSEP is to improve the economic prosperity and quality of life for all communities in Leicester and Leicestershire.[5] The LSEP recognises the importance of the role played by the larger settlements (i.e. small urban areas, market towns and rural centres), which essentially act as hubs, providing key services to the surrounding rural areas. It is a Sustainable Communities aim, through working with partners, to develop the commercial viability of these centres through a variety of physical and promotional activities.

The LAA states that a market towns programme has been submitted to East Midlands Development Agency (emda) via the LSEP which will continue the work currently being delivered for the next three years. Work will include a Living/Working over the shop/shop front improvement grant, Heritage Economic Regeneration Scheme (HERS), small-scale environmental improvements and joint events between Leicestershire's towns, together with a major Public Realm Improvement Programme for urban centres across the County to be delivered in partnership with the District Councils.

In addition, as a key component of the Economic Development block, seventeen priority settlements have been identified under the 'improving town and village centres' outcome. The seventeen settlements which have been identified are:

- Blaby, Blaby
- Loughborough, Charnwood

[4] Leicestershire LAA Economic Development
[5] http://www.lsep.co.uk/about.html

- Shepshed, Charnwood
- Syston, Charnwood
- Thurmaston, Charnwood
- Broughton Astley, Harborough
- Lutterworth, Harborough
- Market Harborough, Harborough
- Earl Shilton, Hinckley and Bosworth
- Hinckley, Hinckley and Bosworth
- Market Bosworth, Hinckley and Bosworth
- Melton Mowbray, Melton
- Ashby, North West Leicestershire
- Coalville, North West Leicestershire
- Oadby, Oadby and Wigston
- South Wigston, Oadby and Wigston
- Wigston, Oadby and Wigston

Survey work has been undertaken in each of the above settlements.

Survey Methodology

In total, 3000 interviews were planned across the 17 settlements. The sample structure called for a minimum of 100 interviews per settlement, with the remaining 1300 interviews distributed pro-rata on the basis of population size, meaning that the target for some of the villages was only a little over 100 in total, whilst for Loughborough it was over 300. Within the total sample, and for each centre, quotas were also established to control for:

- Age group;
- Ethnicity (white and non-white respondents);
- Gender;
- Interviews conducted on weekdays and Saturdays;
- Interviews conducted during the daytime and evening (after 5.30);

- Interviews conducted on market days and non-market days (where centres had a market).

The client identified a number of locations in the centre of each settlement where interviews took place – these were typically within the main shopping areas, often in or around the main market squares or retail developments. Interviews took place over a six week period through July and August 2006, following a pilot in Loughborough and Shepshed which indicated no problems in delivering the questionnaire.

Characteristics of survey respondents

Survey size in town and village centres

The total sample comprises 3,072 responses across the 17 town and village centres. These were distributed as shown in the table below. Interviews in Broughton Astley and Shepshed proved more difficult to achieve than in other centres.

Table 1

GEOGRAPHIC DISTRIBUTION OF SAMPLE		
TOWN	**NUMBER**	**PROPORTION OF TOTAL (%)**
Ashby	150	4.9
Blaby	131	4.3
Broughton Astley	79	2.6
Coalville	226	7.4
Earl Shilton	142	4.6
Hinckley	236	7.7
Loughborough	354	11.5
Lutterworth	116	3.8
Market Bosworth	143	4.7
Market Harborough	215	7.0
Oadby	216	7.0
Shepshed	108	3.5
South Wigston	161	5.2
Syston	172	5.6
Thurmaston	180	5.9
Wigston	228	7.4

Moreover, the timing of the sample was distributed as shown below:

Table 2

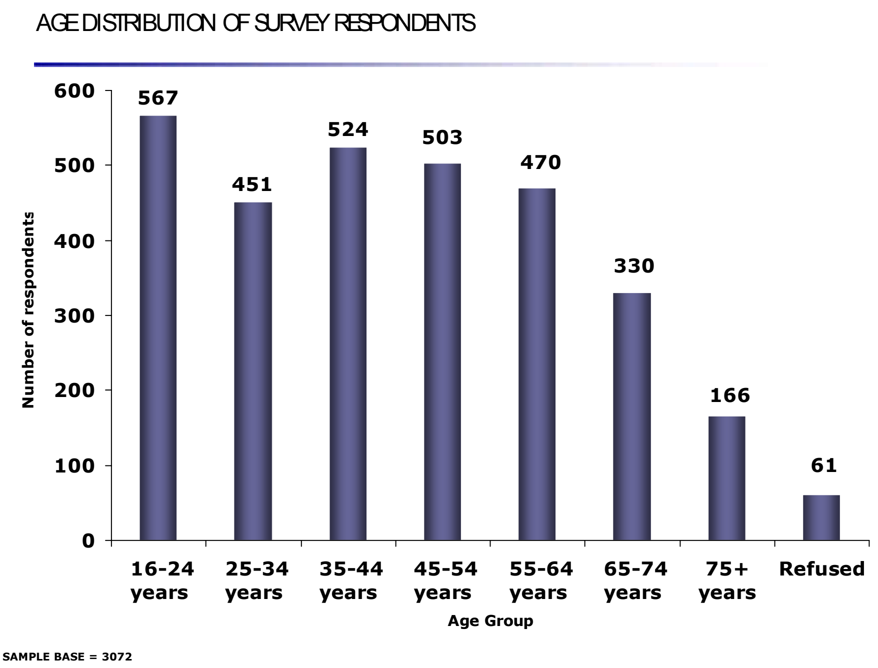
TIMING OF INTERVIEWS		
TIME OR DAY OF INTERVIEW	**NUMBER**	**PROPORTION OF TOTAL (%)**
Market Day	1,134	36.9
Non-Market Day	1,938	63.1
No Market		
Saturday	1,116	36.3
Week Day	1,956	63.7
Day (before 5.30pm)	2,400	78.1
Evening (after 5.30pm)	672	21.9

Gender

Overall, 45.7% of respondents were male, and 54.3% female, though this varied from centre to centre. Non-white, self-employed and unemployed respondents were more likely to be male.

Age

Figure 1



The respondents comprised a broad range of ages, with robust samples achieved for all age groups, including the younger age groups which can often be under-represented in such surveys.

- Respondents aged 65 and over were relatively most common amongst respondents in Lutterworth (23.3%), Wigston (22.8%) and Oadby (21.8%). At the other end of the spectrum, 16-24 year olds were most frequently found amongst respondents in Coalville (28.8%), Market Harborough (27.4%) and Melton Mowbray (27.0%). This variation is likely to be both a product of the different age profiles of people present in each centre, and also normal, random variations in numbers of respondents in relatively small sub-samples;

- Respondents between 25 and 54 were more likely to be interviewed on a Saturday, and 16-24s more likely to be interviewed on a weekday. 25-34s were relatively more common amongst evening visitors;

- Non-white respondents were very much more likely to be under 35, and very much less likely to be 45 or over.

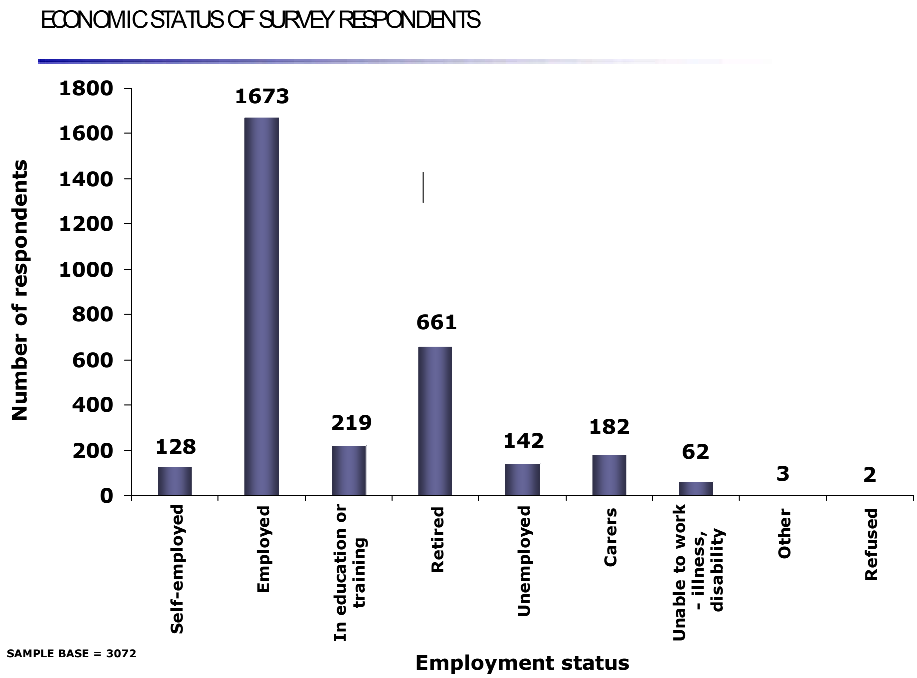
Ethnicity

Overall, 92.6% of respondents described themselves as white, and 6.8% as non-white (with 0.6% refusing to state an answer). Of the non-white respondents, the largest group were those describing themselves as of Indian background, who made up 4.1% of all respondents, with the next largest groups being Pakistani (0.6%), Black African (0.5%) and Bangladeshi (0.4%).

Non-white respondents were proportionately most often interviewed in Oadby (14.8%), Loughborough (13.0%) and Thurmaston (12.2%) which reflects the ethnic diversity of these towns.

Economic Status

Figure 2



The majority of survey respondents were employed (54.5%), with the next largest groups being retired (21.5%), and in education or training (7.1%).

- Variations from this pattern between centres are modest, though students were relatively more numerous in Market Harborough, Melton Mowbray and Loughborough, and retired respondents more common in Market Bosworth, Lutterworth, Broughton Astley and Market Harborough.

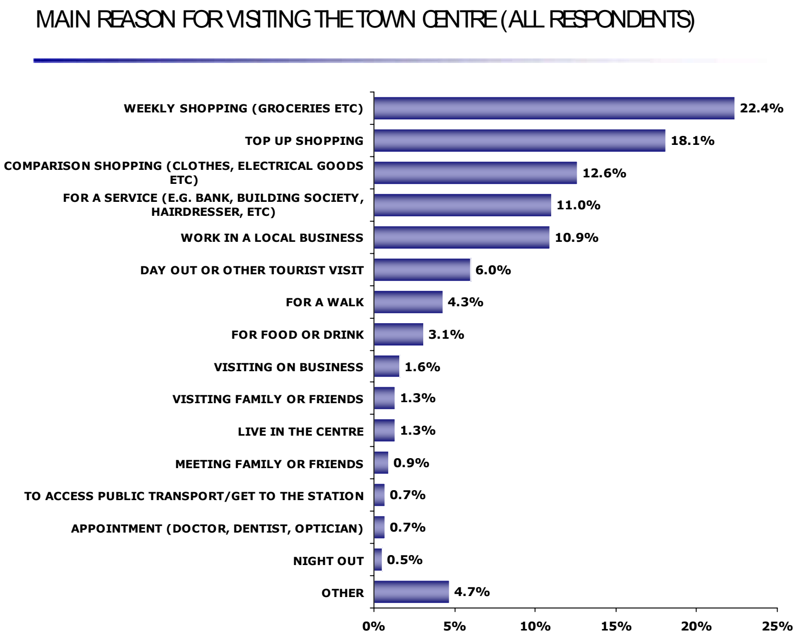
- Unsurprisingly, employed respondents were more numerous amongst those interviewed on a Saturday, whilst correspondingly, there was a higher proportion of retired respondents on weekdays.

3 Visiting the Town Centre

Visits

Reasons for visiting the town centre

Figure 3



SAMPLE BASE = 3072

The intention of the survey was to speak to a cross-section of people present in the centres of the towns and villages, who may have been present for a whole range of purposes. Unsurprisingly, shopping trips of various sorts accounted for more than half of visits to the centres, with more than one in ten visiting primarily for other services such as banking. A similar proportion of respondents, more than one in ten, were present because they worked in the centre, whilst overall a little over one in twenty were tourists. Whilst only a small number of visitors were present primarily for food or drink, it is likely that this would have been a secondary reason for many of the visitors there for other reasons.

- The mix of reasons for visiting in each centre does vary, but not, in general, widely, and not with any readily discernable pattern – there is no clear pattern for example, of larger centres being used more for comparison shopping. The centres with the highest proportions of visitors present for tourism or a 'day out' were Market Harborough (16.3%), Market Bosworth (14.7%), Thurmaston (13.3%) and Loughborough (12.1%);

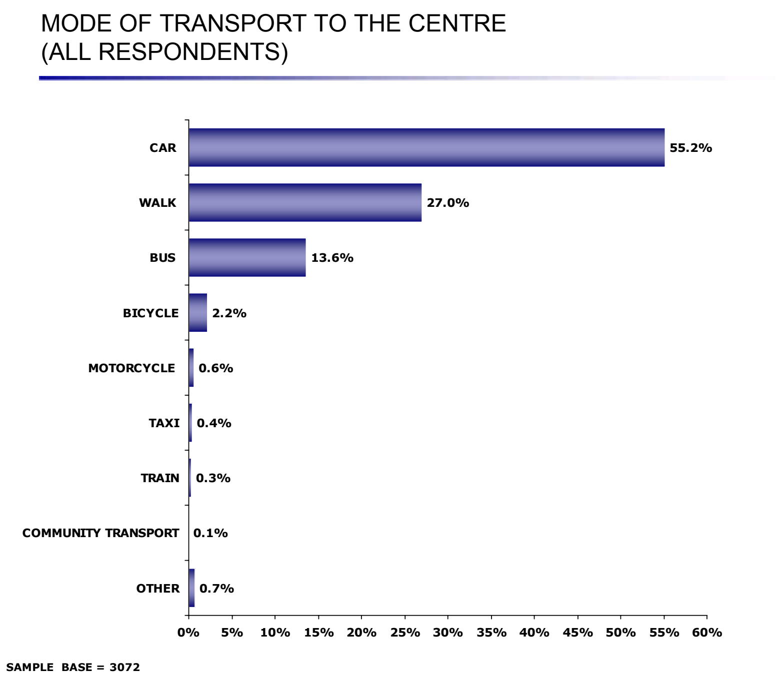
- Comparing week days with Saturdays, visits for weekly shopping were more prevalent on Saturdays (28.8% of visitors compared with 18.8% on weekdays), as were other types of shopping, though to a lesser degree. Respondents in the centre for a service (banking, building society, hairdresser, estate agent and accountant were the examples offered) were more likely on weekdays, as were respondents in the centre because it was their place of work;

- Amongst respondents interviewed after 5.30pm, weekly grocery shopping was more prevalent as the primary reason to be in the centre (indicating the impact of longer opening hours on retail use, perhaps), as were the smaller number of visits primarily for food and drink. Notably less common in the evening were visits for shopping other than weekly grocery shopping, visits for services, and those in the centre because it was where they worked;

- Women were more likely to be in the centres for all forms of shopping, but particularly for weekly grocery shopping, and also because they worked in the centre. Men were more likely to be there for days out and tourism, and for food or drink – though like women their most common reasons for being in the centres were related to shopping, services and work.

Mode of transport used to get into the centre

Figure 4



Just over half of the trips into the centre by respondents to the survey were made by car. It is particularly notable, however, that more than a quarter of respondents walked into the centre – whilst this will no doubt be due to the timing of the survey in the middle of the summer, it does also indicate the extent to which the small size of most of the towns and villages may be encouraging access on foot. On other modes, one in seven arrived by bus, and one in fifty by bicycle.

- Examining modes of transport by each centre, arrivals by car were most prevalent in Syston (65%), Thurmaston (77%) and Wigston (63%), but relatively lower in Hinckley (44%), Loughborough (49%), Market Harborough (47%), Melton Mowbray (45%), and Shepshed (49%). In each case lower levels of car dependence were due to higher levels of bus use or walking to reach the centre in question. Arrivals by bus were notably higher in Hinckley (19%), Loughborough (27%) and Market Harborough (18%), whilst arrivals on foot were highest in Melton Mowbray (40%), Shepshed (46%) and also Lutterworth (40%). Bicycle use was highest amongst respondents in Blaby (4%), Broughton Astley (5%), Market Bosworth (4%) and Market Harborough (6%).

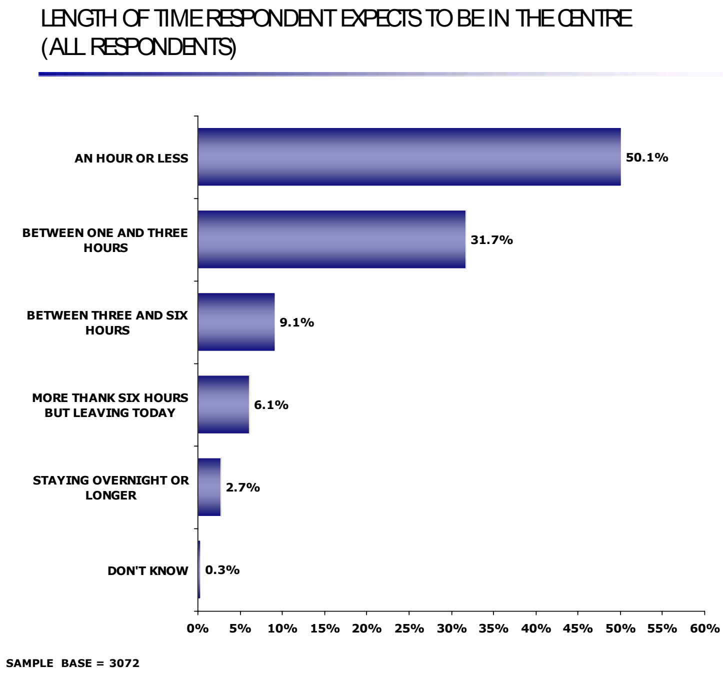
- There were few notable differences in the mode of transport used depending on the day or time of interview, or on the basis of ethnicity, whilst on the basis of gender, the most significant difference was the higher proportion of women arriving by bus (15%).

- By age, 45-54 year olds were the most likely to use a car (67%) and 16-24 year olds the least likely (35%), whilst bus users were most frequently either 16-24 (24%) or 75+ (21%) – an age related pattern of bus use notable in other surveys. The youngest group of respondents (16-24 year olds) were also the most likely to have walked into the centre (36%).

- As might be expected, the mode of transport used to access the centres was closely related to economic status, with students and unemployed respondents less likely to have arrived by car, and more likely to have arrived by bus or on foot. Carers were also more likely to have arrived by bus, whilst those unable to work due to illness or disability were less likely to have used a car, and more likely to have walked.

Length, frequency and timing of visits

Figure 5



Half of respondent visits are reported as less than an hour in length, and another third are between one and three hours. At the other end of the scale, only 3% of respondents report that their visit is overnight (Figure 5).

- The length of time respondents expected to stay in each centre varied widely between centres. In the largest of the centres, Loughborough, only 16% expected to stay for an hour or less, whilst 61% expected to stay for between 1 and 3 hours, and 16% between 3 and 6 hours. Market Harborough showed a similar pattern, and also had the highest proportion of respondents expecting to stay more than 6 hours whilst leaving the same day (10%). At the other end of scale, visitors to a number of centres were most likely to stay for less than an hour, notably Broughton Astley (77%), Earl Shilton (76%), Oadby (72%) and Syston (68%). This will have much to do with the relative size and importance in terms of retail and service hierarchy of the centres in question.

- Non-white respondents were more likely to stay over three hours, and less likely than white respondents to be staying for less than an hour. In contrast retired people were more likely to be staying for an hour or less, as were carers.

More than a third of respondents visit the centre daily, and nearly another third visit at least twice a week. Just over one in twenty are only occasional visitors, whilst one in fifty questioned are first time visitors to the centre (Figure 6).

- Respondents in a number of centres were far more likely to be visiting on a daily basis, typically these being the smaller centres, including Shepshed (54% daily visitors), Earl Shilton (53%) and South Wigston (52%). Daily visitors were least common in Loughborough (23%) and Thurmaston (13%).

- Daily visiting was most common amongst the youngest age group, with 44% of 16-24 year olds doing so. In contrast carers (25%) were significantly less likely than any other group to be daily visitors.

It is intriguing to note that around 1 in 50 people in any of the centres at any one time is likely to be new to the place –indicating that for all of these centres, making an impression on new visitors is an important task, given their numbers.

Figure 6

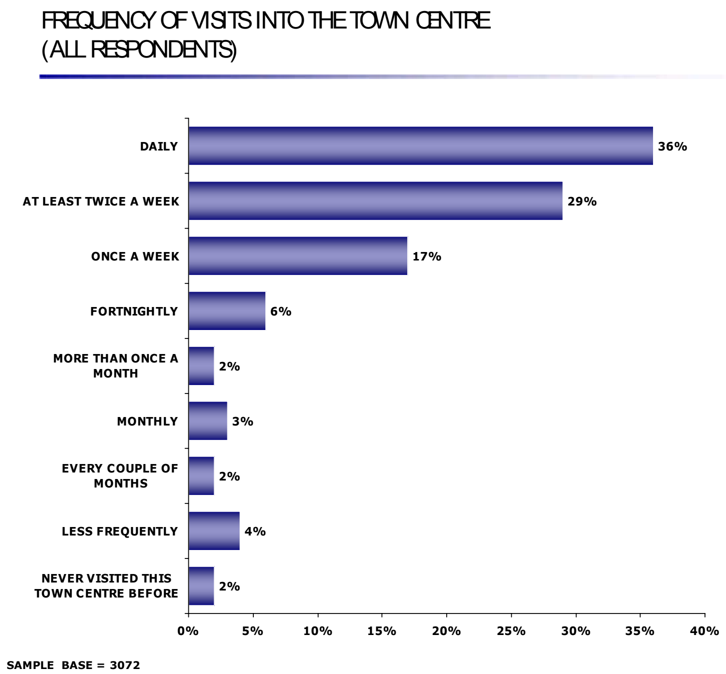
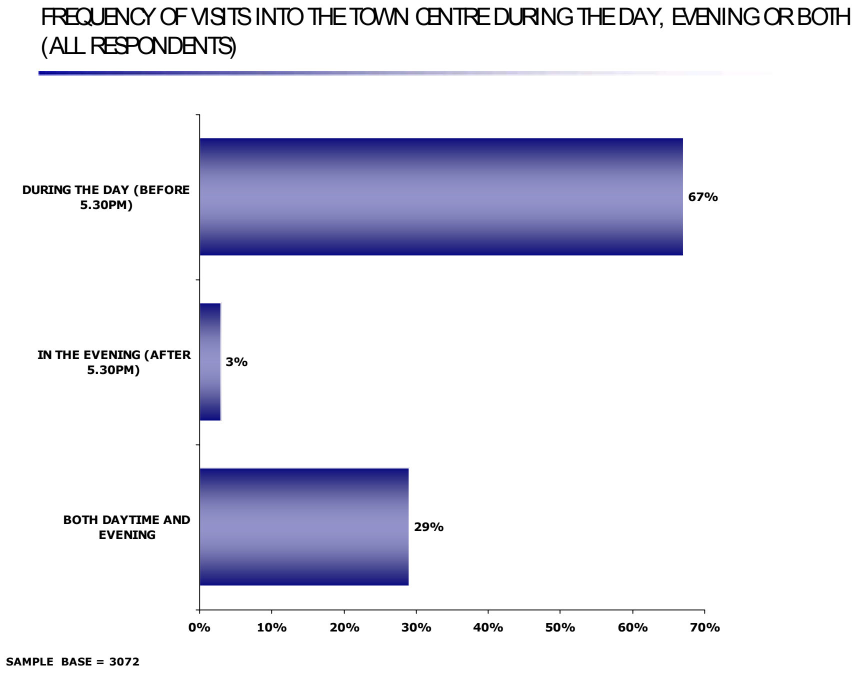


Figure 7



Two-thirds of respondents visit the centre in question only during the day, whilst of the remainder, most visit both in the day and in the evening, with only a very small minority being evening visitors only (Figure 7). Whilst two-fifths of respondents never visit the centre in question during the evening, it is clear from those that do that evening visits tend to be less regular than daytime visits, with weekly visits most common, and significant numbers visiting less regularly than that. Whilst there are significant numbers of regular Friday night or weekend evening visitors, most do not report a clear pattern as to the day they visit (Figures 8 and 9).

- Whilst on average about two in five respondents have not visited the centre in question during the evening, this proportion varies from centre to centre. 68% of visitors to Earl Shilton, and 60% of visitors to Hinckley have not visited in the evening;

- Women were also less likely than men to have been to the centre in the evening, whilst there was a clear relationship between age and evening visits, with older age groups increasingly unlikely to visit in the evening. In this context it is unsurprising that retired respondents were also less likely to have made an evening visit to the centre, a pattern shared with carers and those unable to work because of illness or disability.

Figure 8

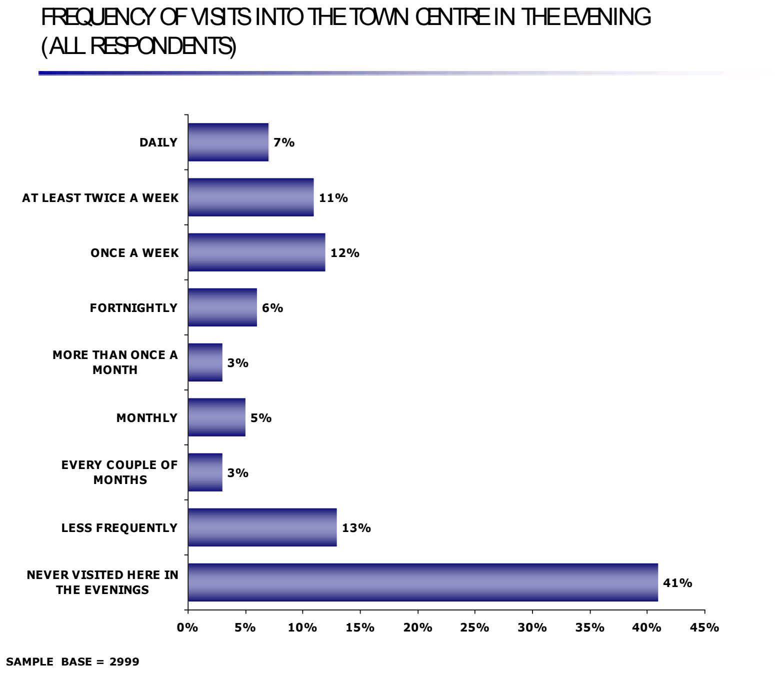
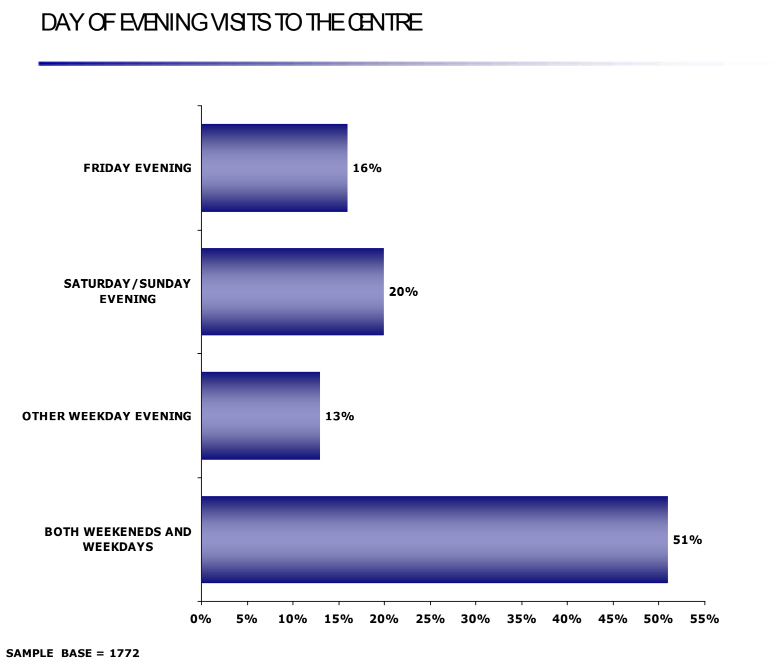


Figure 9

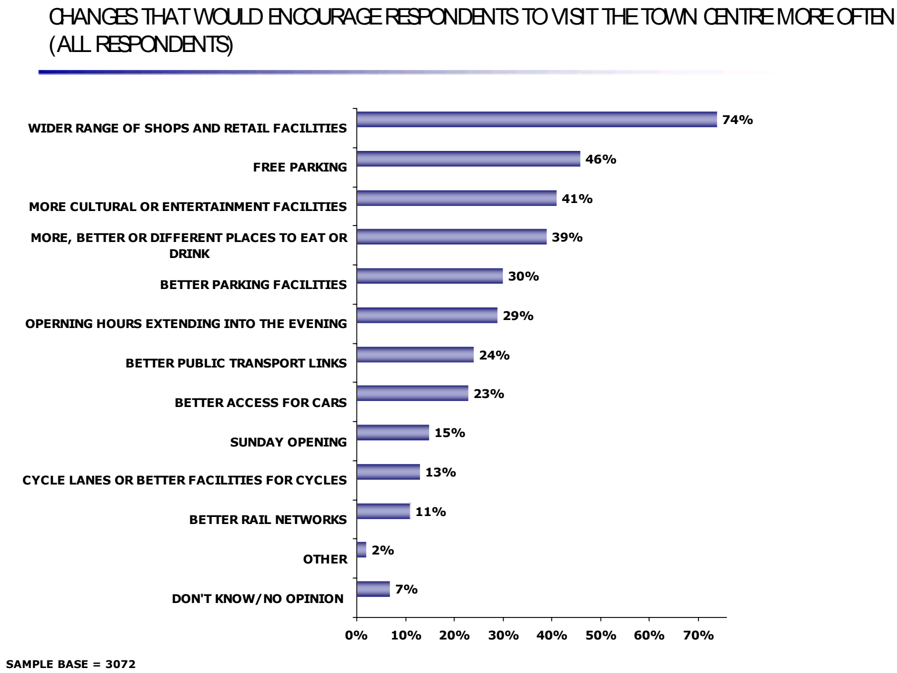


What would encourage you to visit the centre more?

Respondents were asked to identify those issues which would encourage them to visit the town or village centre they were interviewed in more often. They were able to cite more than one issue. Given the importance of shopping trips in generating visits, it is rational that the reason most commonly selected as having the potential to encourage respondents to visit more often is a wider range of shops and other retail outlets, with three-quarters citing it as important.

Thereafter transport issues are significant with free parking, better parking, better public transport links and better access for cars all cited regularly. Of the transport options, better rail and cycling links are the least significant. Improvements in other attractions in the centre – cultural and entertainment venues, and better places for food and drink – are also very important, underlining the importance accorded to centres which offer a wider range of activity than merely retail. Extension of opening hours, particularly evening opening, may also be important for some visitors.

Figure 10



The relative importance of these answers varied widely between the different centres:

- Increasing the range of shops and retail facilities was cited by larger proportions of respondents than average in Coalville, Hinckley, Lutterworth, South Wigston and Wigston, but was relatively less important in Ashby and Market Bosworth;

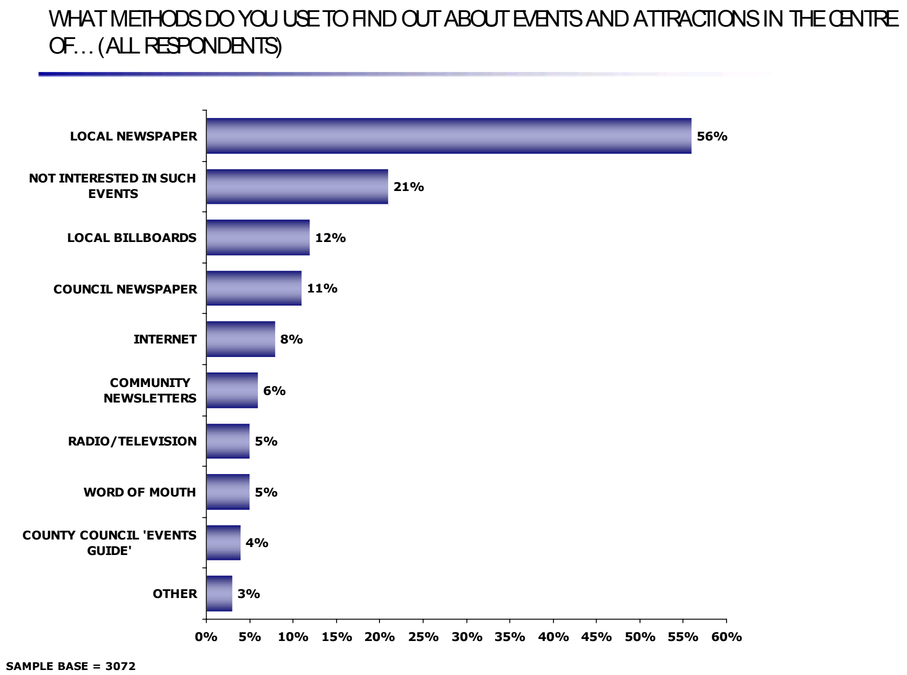
- Extending opening hours into the evening was relatively more popular in this context in Coalville and Loughborough, whilst Oadby visitors were particularly concerned with achieving better access for cars, and users of the centre in Ashby wanted better parking facilities;

- Free parking was thought to be a particularly good incentive for visiting by respondents questioned in Coalville, Melton, Syston and Wigston, and in a number of places, respondents thought that increasing the number of cultural and entertainment facilities would encourage more visits – particularly in Hinckley and Lutterworth. More places to eat and drink were more likely to be thought a potential incentive to increase visits in Hinckley and South Wigston.

Whilst these issues varied in importance from centre to centre, there is little evidence that they varied widely between different groups in the population.

Attractions and events

Figure 11



As is clear from Figure 11, local newspapers were overwhelmingly the most likely source of information about local events and attractions taking place in the town and village centres, with other sources only modest in their importance by comparison.

Whilst this pattern was largely repeated from centre to centre, some variations were notable:

- Local newspapers were even more important as a source of information about local events in Broughton Astley, Earl Shilton, Lutterworth and Shepshed, but of relatively less importance in Market Bosworth and Thurmaston;

- Local billboards were of notably greater importance in Blaby, Broughton Astley, Earl Shilton and Melton Mowbray, whilst council newspapers were of greater significance in Coalville and Hinckley, and community newsletters particularly important in Lutterworth. In Ashby, the Internet was far more important as a source of information than was the case in any other centre.

Other notable variations are as follows:

- Local newspapers were relied on a little more by older people, and significantly more by white (57%) than non-white (44%) respondents. Similarly council newspapers were more likely to be used by older respondents.

- 16-24 year olds and those in education or training were more likely to use the Internet to find out local event information than others.

Attending events

In total, only a minority, 12.3% across all centres, had attended a recent event in the centre. By location, this was relatively higher in Market Bosworth (29%), Market Harborough (24%), Earl Shilton (23%), Melton and Lutterworth (both 21%). Attendance at such events was most common amongst those aged 35-64, and more frequent amongst white than non-white respondents.

Amongst those attending such events, the most frequently cited were:

- Carnivals, mentioned by 24% of those who had attended an event, cited most frequently in Earl Shilton, Hinckley, Market Harborough and Shepshed;

- The fair, principally in Loughborough;

- Farmers markets, particularly in Blaby, and the French markets in Lutterworth, Ashby and Market Harborough;

- Jurassic Park or dinosaur events (Ashby, Blaby, Market Harborough);

- Melton Mowbray Country Fair.

What makes this place special?

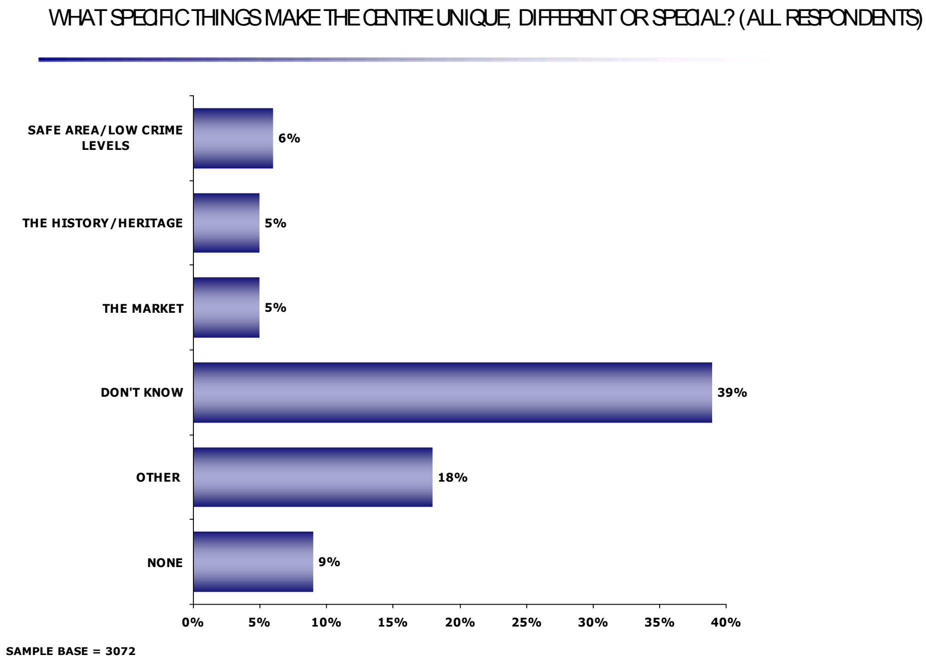
Respondents were also asked, in an open question, about what they thought made the centre they were in unique, different or special. A huge diversity of answers were offered, none of which in total accounted for more than 6% of all answers (the most frequently cited being safety and low crime), making it difficult to report consistent findings at a county level.

- The history and heritage of the place were thought particularly important in Ashby and Market Bosworth;

- The size of Lutterworth was seen as significant in this context;

- In Lutterworth and Market Bosworth, the market was seen as important in this local distinctiveness;
- In Loughborough, the culture of the place was important;
- In Market Bosworth and Market Harborough, the layout of the centres was significant.

Figure 12

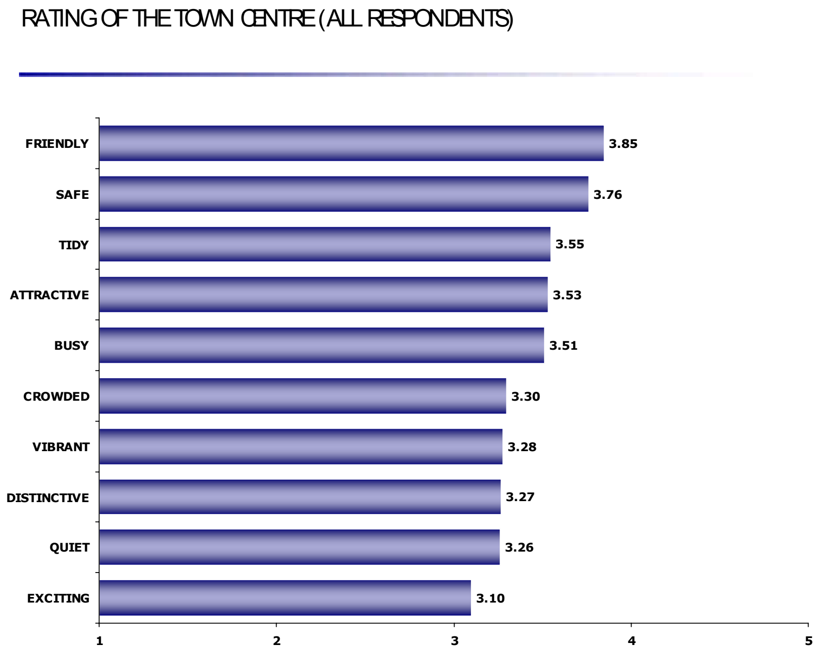


4 Attitude towards the centre

Description and attitudes towards the centre

Respondents were asked to say to what extent they agreed with a series of words to describe the centre they were in when interviewed. Overall, Leicestershire's town and village centres are most likely to be described as 'friendly', with 'safe', 'tidy', 'attractive' and 'busy' also being terms that respondents associated with. At the opposite end of the spectrum 'exciting', 'quiet', 'distinctive' and 'vibrant' were the terms least likely to be associated with local centres.

Figure 13



There are, of course, significant variations from centre to centre in the descriptions applied:

- The centres most likely to be described as *attractive* were Market Bosworth (mean score of 4.5, compared with an average of 3.6), Ashby (4.2) and Market Harborough (4.1). The least attractive centres were South Wigston (2.7), Shepshed (2.9), Coalville and Earl Shilton (both 3.1);

- Most likely to be described as *vibrant* were Market Harborough (3.9 compared to an average of 3.3) and Ashby (3.7), and least likely Shepshed (2.4) and South Wigston (2.5);

- Most likely to be described as *busy* were Loughborough (4.0 compared to an all centres average of 3.5), Ashby, Market Harborough and Wigston (all 3.9). Least likely were Oadby (2.8), Shepshed and South Wigston (both 2.7);

- The centres most strongly described as *quiet* were Syston, Shepshed and Oadby (all 3.7 compared to the all centres average of 3.3), whilst the least quiet was Loughborough (2.8);

- Wigston (3.8 compared to an all centres average of 3.3), Loughborough (3.7) and Oadby (3.6) were most likely to be described as *crowded*, and Shepshed (2.4) the least likely;

- Market Bosworth (4.3 compared to an all centres average of 3.9) Lutterworth (4.2), Market Harborough and Thurmaston (both 4.1) were described as the *friendliest* centres, whilst South Wigston (2.8) was by some distance the least friendly;

- On the issue of *safety*, there was some clear polarisation, with the safest town being Market Bosworth (4.3 compared to an all centres average of 3.8), and the least safe being South Wigston (a score of 2.7 being the lowest by some margin);

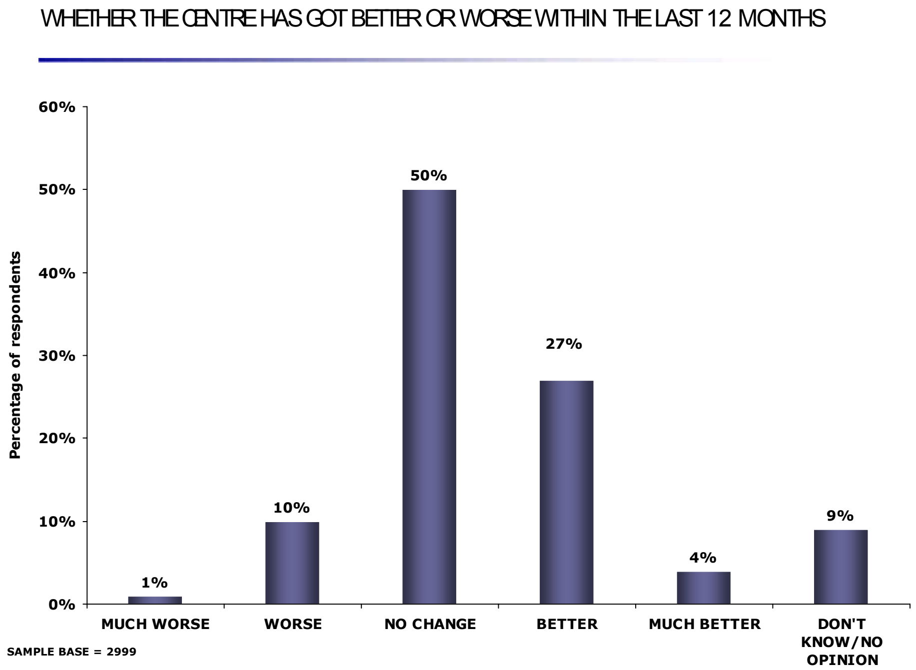
- The centres most strongly associated with the term *exciting* were Wigston (3.8 compared to an all centres average of 3.1) and Ashby (3.6). At the opposite end of the spectrum, the least exciting appear to have been Lutterworth (2.5) and Shepshed (2.3);

- The most *distinctive* centres were thought to be Market Bosworth (4.3 compared to the overall average of 3.3), and Ashby (4.1), whilst the least distinctive was Broughton Astley (2.5);

- The centre most strongly associated with being tidy was Market Bosworth (4.5 compared to the wider average of 3.6), whilst at the opposite extreme, the centre least associated with tidiness was South Wigston (2.7).

Has the centre got better or worse in the past 12 months?

Figure 14



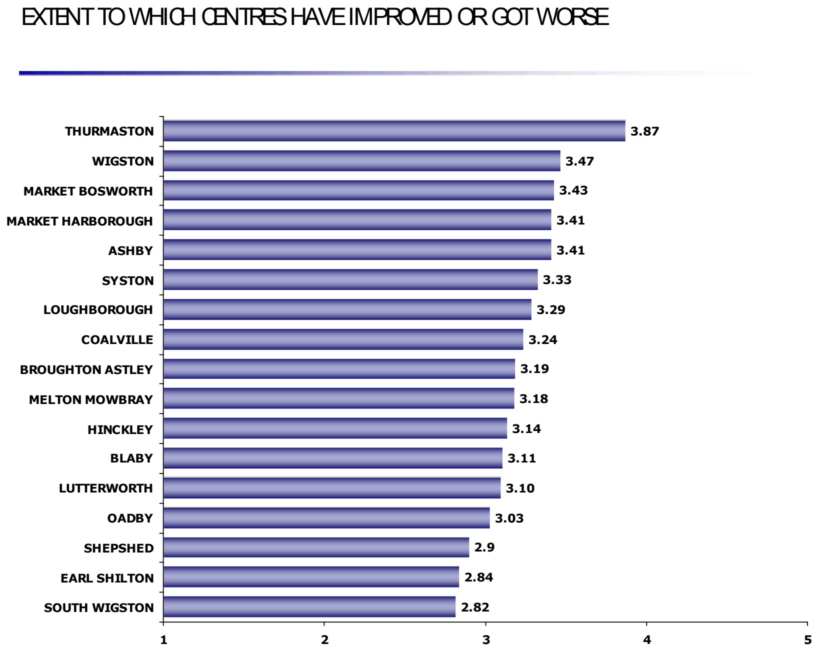
Whilst half of respondents didn't report any overall change in the town and village centres of Leicestershire over the past 12 months, a third believed that they had improved, compared to only one in ten who thought they have got worse.

Converting this assessment to a single numerical value, a score of 3 indicates no overall change, and since the average for all centres from the above is 3.24, this reflects the fact that more respondents overall report improvement than a worsening situation. On average, town and village centres in the county were thought to have improved. However, the position varies from centre to centre, though not between different groups in the population.

Figure 15 illustrates this score centre by centre, with the centres thought most frequently by respondents to have improved having the highest scores, and those with the lowest scores being those least reported as having improved, and most reported as having got worse.

Clearly the score for Thurmaston points to a general consensus of considerable improvement over the past 12 months, whilst a further group of centres – Wigston, Market Bosworth, Market Harborough and Ashby – were also viewed by respondents as having improved significantly overall in the past 12 months. At the other end of the scale, it is clear from the figures that respondents thought Shepshed, Earl Shilton and South Wigston to have got worse over the preceding 12 months.

Figure 15



How well do town and village centres serve different population groups?

Table 3

RATING OF THE TOWN CENTRE FOR VARIOUS GROUPS							
	Sample base	Very poor (1)	Poor (2)	Neither good nor poor (3)	Good (4)	Very good (5)	Mean score
		%	%	%	%	%	
Young people	3072	4	15	33	36	5	3.25
People with disabilities	3072	1	4	34	42	9	3.61
Shoppers	3072	1	6	28	53	8	3.65
Visitors	3072	1	6	26	50	12	3.71
Families	3072	1	5	25	51	14	3.75
Elderly people	3072	1	4	25	52	13	3.79

All respondents were asked for their view on how well the centre they were in served different groups in the population. The results for each of these groups are shown in Table 3 above. It is clear that amongst the total population of respondents, there is greater concern about how well town and village centres serve young people than for any other group. One in five thought the centres were poor for young people, whilst the smallest proportions believed them to be good or very good.

Respondents tended to think that the best served groups were elderly people and families.

Looking at these ratings centre by centre:

- The better centres for *young people* appear to be Melton Mowbray (which achieved an average score of 3.7, compared to the 3.3 average), Loughborough, Wigston (both 3.6), Thurmaston and Ashby (both 3.5). Those considered particularly poor for young people were Shepshed (2.4) and Earl Shilton (2.7);

- For people with *disabilities*, the range of assessments, centre by centre, was narrower, with the highest score being the 3.9 achieved Market Harborough, and the lowest the 3.2 for South Wigston. This precise pattern was also repeated for assessments of centres for *elderly people*;

- Assessing each centre for suitability for *families*, Market Harborough again came out top (4.1) where it was joined by Oadby (also 4.1). Once again, South Wigston was least well rated (3.1);

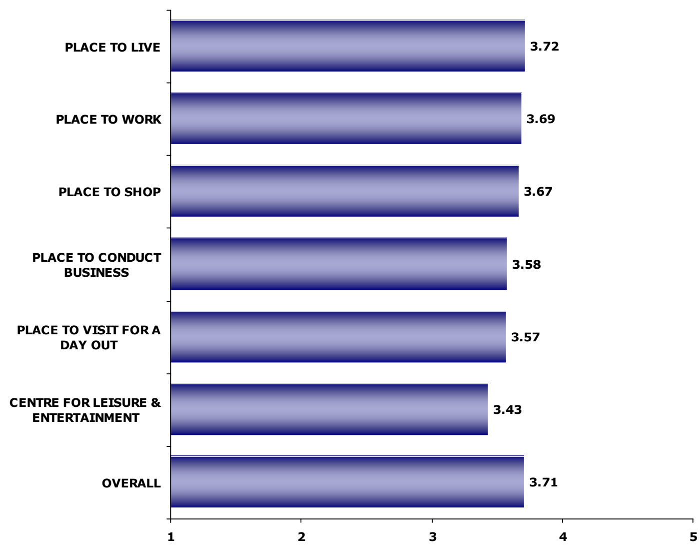
- For *visitors*, Market Bosworth (4.2) was thought to be the best, whilst the worst centres for visitors were South Wigston and Shepshed (both 3.1);

- Finally, for shoppers, the most highly rated centres were Ashby (4.0) and Thurmaston (3.9) and the poorest South Wigston (3.2), Shepshed and Melton (both 3.3).

How good are the centres as places for particular activities?

Figure 16

RATING OF THE TOWN AS A PLACE TO LIVE, WORK, SHOP ETC (ALL RESPONDENTS)



Overall, on a scale of 1 to 5, where 5 is the most positive score, the town and village centres in Leicestershire are rated at 3.7 as places – that is they are well above average, good but not very good. They are most highly rated as places to live, work and shop, but are least well rated as places for leisure and entertainment, and as places to visit.

Again, against each measure there were variations from centre to centre:

- As places to *live*, the most highly rated centres were Market Bosworth (with a score of 4.3 compared with an all centres average of 3.7), Lutterworth and Market Harborough (both 4.1), whilst at the opposite end of the scale South Wigston (2.8) and Earl Shilton (3.2) were the least well thought of;

- As places to *visit*, Market Bosworth (4.4) and Loughborough (4.0) were rated the highest, whilst South Wigston (2.7) and Shepshed (3.0) were lowest;

- As places to *work*, many centres had average scores between 3.5 and 4.0, though marginally the best thought of were Market Bosworth (4.0), Market Harborough and Loughborough (both 3.9), whilst South Wigston again came out with the lowest score (2.9);

- Ashby was highest rated as a place to *shop*, scoring 4.0 compared to an all centres average of 3.7, whilst South Wigston and Shepshed (both 3.0) scored lowest;

- Best thought of as centres for *leisure and entertainment* were Oadby, Wigston and Ashby (all 3.8 compared to the all centres average of 3.4), and the least well regarded were Shepshed (2.6), Broughton Astley and South Wigston (both 2.9);

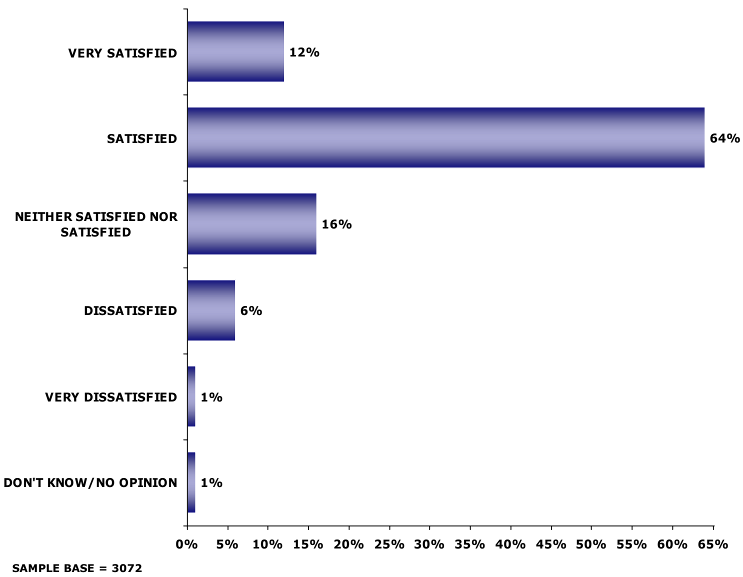
- Respondents rated Loughborough (3.9), Market Harborough and Market Bosworth (both 3.8) as the best places in which to *conduct business*, whilst in contrast South Wigston (2.9) and Broughton Astley (3.0) were least well thought of;

- Given the relative positions of the centres described above, it is consistent that respondents thought Market Bosworth (4.3) and Ashby (4.1) to be the best centres overall, and conversely thought South Wigston (2.9) and Shepshed (3.3) were the worst.

Services available in the centre

Figure 17

OVERALL SATISFACTION WITH THE (NAME OF PLACE) AS A GOOD PLACE TO SHOP, VISIT AND DO BUSINESS (ALL RESPONDENTS)



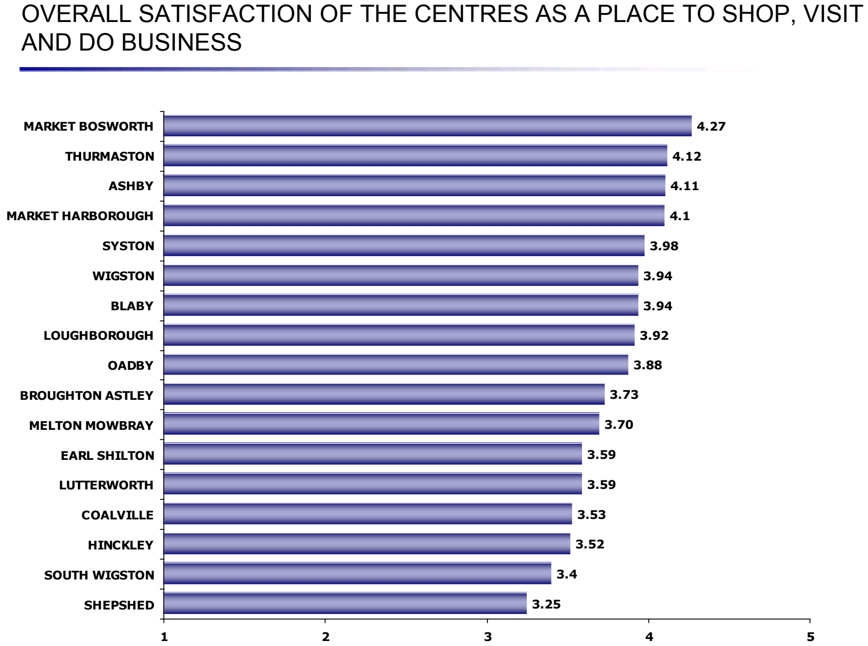
Overall, there is clearly general satisfaction with the Leicestershire town and village centres as places to shop, visit and do business (Figure 17), though this also varies from centre to centre, and between different groups in the population, with question 37 on the questionnaire revisiting and reconfirming the findings of other earlier questions.

- Overall, the centres with the highest levels of satisfaction were Market Bosworth, Thurmaston, Ashby and Market Haroborough;

- Lowest overall satisfaction scores from respondents were recorded for Shepshed, South Wigston, Hinckley and Coalville;

- Whilst differences between groups in the population were generally small, those aged 65 or over, and retired respondents, tended to show slightly higher levels of satisfaction than others.

Figure 18



Given the nature of the reasons for being in the centres, as discussed earlier in the report, it is not surprising that, as Figure 19 shows, the most widely used services in the centres are shops, banks and building societies, followed by post offices and markets. Clearly these services are critical to the continued attraction and levels of activity in the centres.

It is also notable that for some services, awareness can be reduced because some services are not present in all centres, such as markets, job centres or leisure centres. Except at the centre by centre level, it is difficult to unravel whether lack of awareness is due to a lack of presence in some centres, or a lack of awareness on the part of respondents that such a service is present in the centre. Moreover it is clear that there are many services where usage is very far below awareness – these are typically services only used by a small proportion of the population, such as estate agents (most people aren’t looking to buy or sell a house), job centres (usually only used by some of those seeking work, or actually out of work). For policy makers however, the low level of usage for some services – libraries, leisure centres, and council centres and shops – may be something that they wish actively to tackle, increasing awareness and encouraging use by marketing the advantages of doing so.

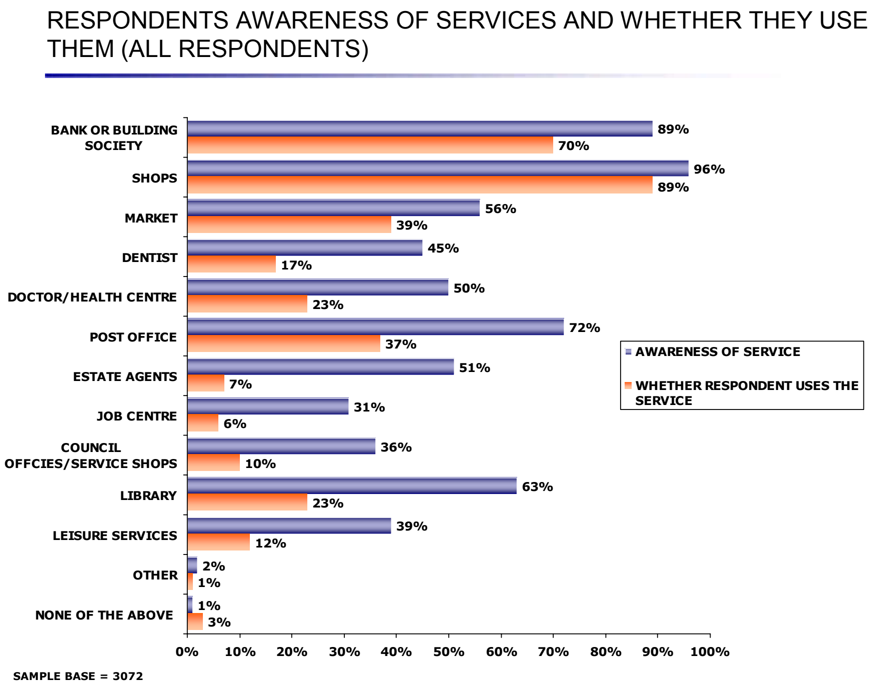
The centre by centre variations in these figures are discussed in more detail in the centre specific reports which supplement this main report. By population groups, there are few significant differences in the likelihood to use particular services, though:

- Men are slightly more likely to use shops, markets and leisure services in the centres, and women dentists and post offices;

- Markets tend to be used most by those under 35 and 75 or over;

- Dentists were least used by respondents under 25;
- Use of doctors and health centres increases with age;
- 25-54 year olds were the most likely to use estate agents;
- Use of leisure services declines with age;
- White respondents were more likely to use banks and building societies, markets, dentists, doctors and health centres and post offices, non-white respondents were more likely to use estate agents, job centres, libraries and leisure services.

Figure 19



The value of markets

As Table 4 indicates, in those towns and villages with markets, they appear to contribute significantly to the character of the place, and were positively thought of by centre users. Far more agreed than disagreed that markets were busy and well-used, were well maintained in their appearance, had a wide range of products and made a positive contribution to the character of the place. More people preferred to come to the centre on a market day than avoid it, and the overall view was that markets had improved over the past year.

There was however, general support for widening the type of market activity, for example bringing in farmers' markets and continental markets. The issue on which there was greatest disagreement was on the issue of the range of products, suggesting that a significant minority were unhappy with the product range on offer, and potentially flagging an issue to be addressed.

Table 4

RESPONDENT VIEWS OF REGULAR MARKETS							
	Sample base	Disagree strongly (1)	Disagree (2)	Neither agree nor disagree (3)	Agree (4)	Agree strongly (5)	Mean score
		%	%	%	%	%	
The market makes a positive contribution to the character of the town	1763	1	5	21	45	17	3.81
The town needs more different types of markets and continental markets	1763	1	7	22	37	18	3.73
The market is busy and well-used	1763	1	9	20	48	13	3.70
The appearance of the market is well maintained	1763	1	9	24	45	12	3.65
I prefer to come to town on a market day	1763	2	10	27	39	11	3.52
There is a wide range of products available to buy	1763	3	18	17	46	8	3.41
The market has improved over the last year	1763	2	13	31	30	8	3.32

In responding to the statements about markets in the town and village centres:

- Men were more positive than women in thinking there was a wide range of products available, and were also more likely to agree that the market was well maintained;

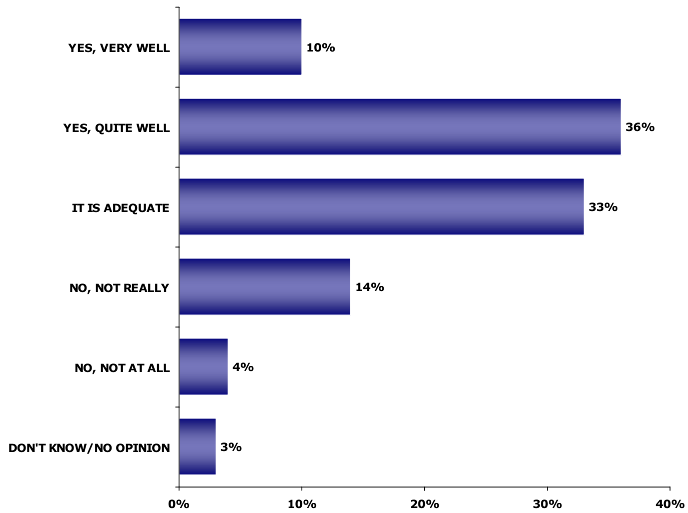
- Men were also more likely to think that centres needed more different types of markets, a view which was also more likely to be shared by non-white than white respondents;

- There was a greater tendency to prefer to come to the centre on market day with increasing age, with retired respondents more likely to agree they would come to the centre on market day than other groups.

Retailing

Figure 20

WHETHER RESPONDENTS BELIEVE THE RETAIL OUTLETS/SHOPS IN THE CENTRE MEET THEIR SHOPPINE NEEDS (ALL RESPONDENTS)

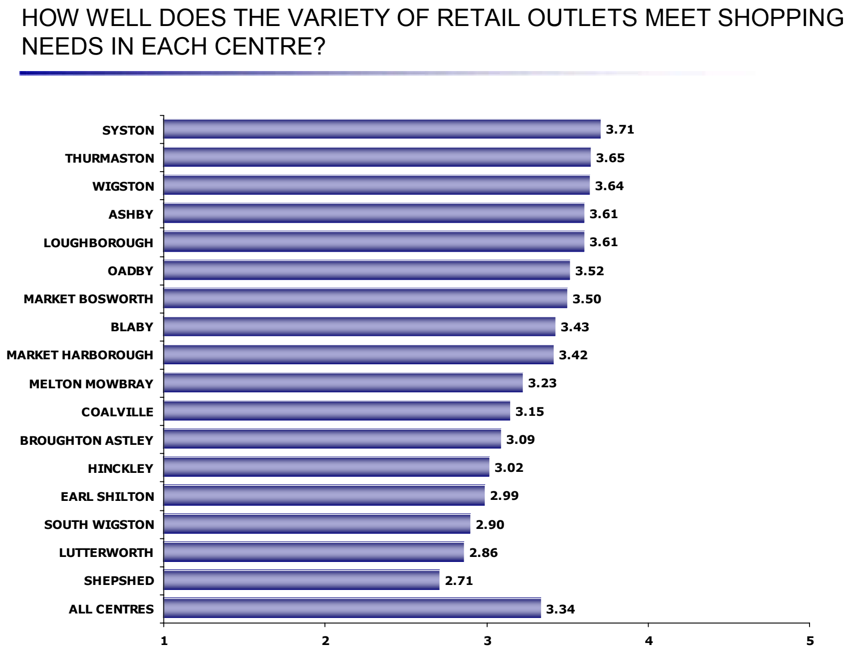


SAMPLE BASE = 3072

When respondents were asked specifically whether the retail outlets and shops in the centres met their shopping needs, nearly a third described the centres as only 'adequate', and nearly a fifth didn't believe their needs were met. Whilst nearly half of respondents were happy, the proportions describing retail facilities as only adequate, or feeling that their needs were not met, does flag an area for potential improvement in some centres.

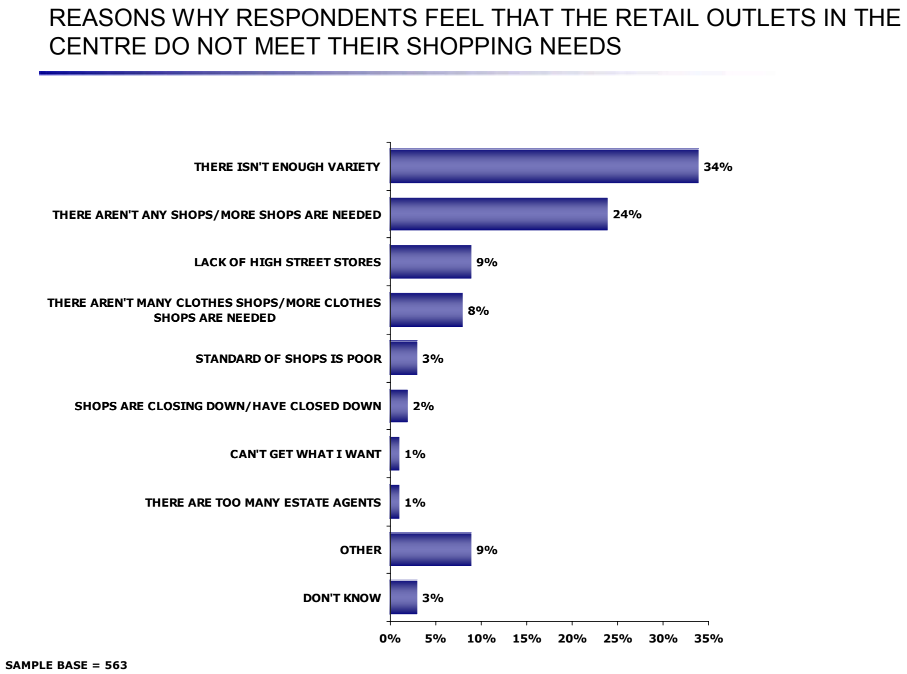
Moreover as Figure 21 shows, there was considerable variation in satisfaction with retail facilities between centres. At one end of the scale, Syston, Thurmaston, Wigston, Ashby and Loughborough were rated relatively positively, whilst Shepshed, Lutterworth, South Wigston and Earl Shilton generally fail to meet the needs of respondents.

Figure 21



Taking this further, the questionnaire asked those who felt their needs weren't met why that was the case. The primary reasons were either a lack of variety of shops, or too few shops. Smaller numbers were concerned by the lack of 'high street' names, and by the lack of clothing shops specifically.

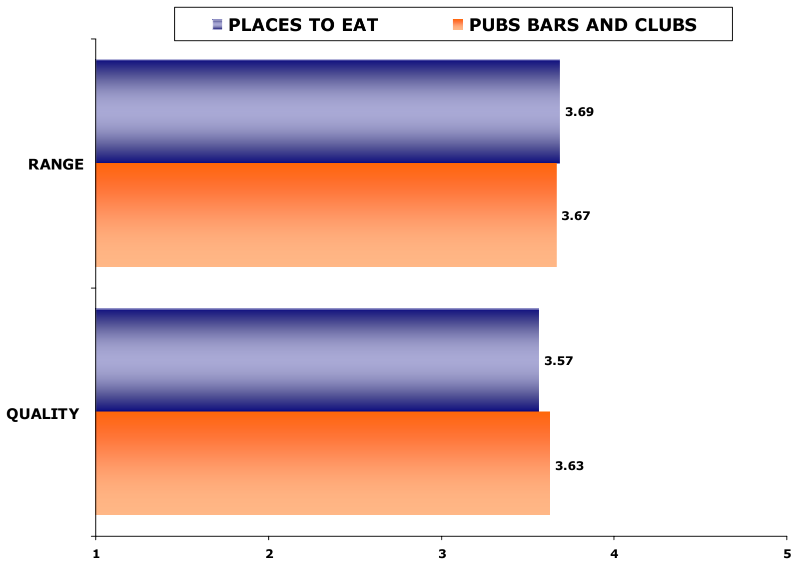
Figure 22



Places to eat and drink

Figure 23

RANGE AND QUALITY OF PLACES TO EAT, PUBS, BARS AND CLUBS (ALL RESPONDENTS)



Overall, there was little difference overall between respondents' views about the range or quality of either places to eat, or pubs, clubs and bars, though quality was reported to be a little higher overall in pubs, clubs and bars than for places to eat.

Figure 24

QUALITY AND RANGE OF PLACES TO EAT IN EACH CENTRE (ALL RESPONDENTS)

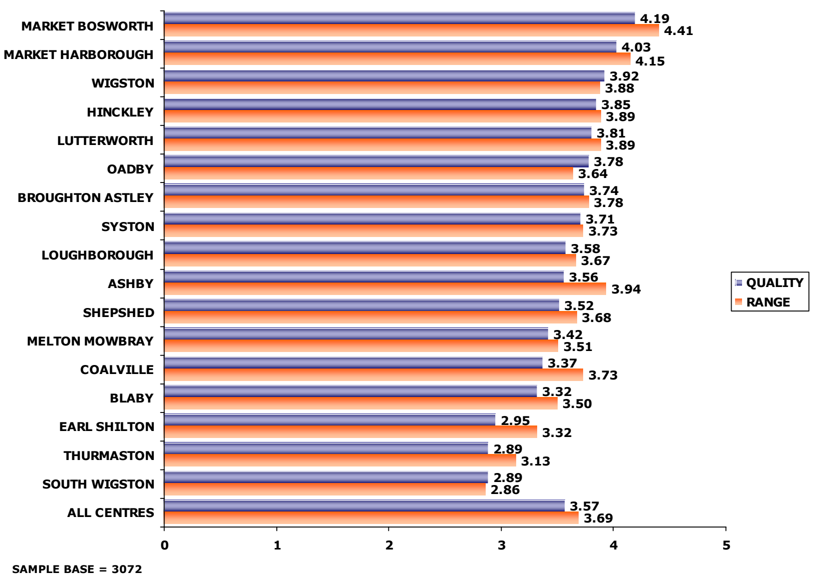
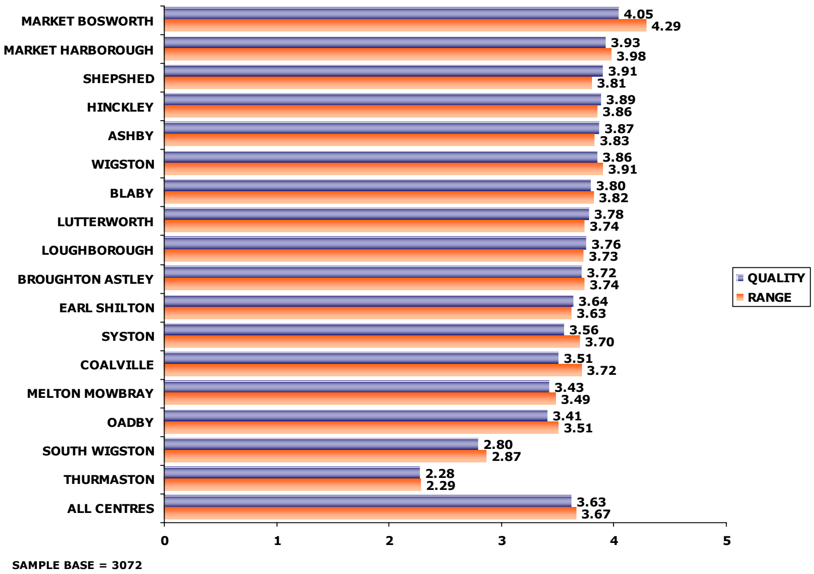


Figure 25

QUALITY AND RANGE OF PUBS, BARS AND CLUBS IN EACH CENTRE (ALL RESPONDENTS)



Clearly there are variations in the assessment made from centre to centre. For places to eat Market Bosworth and Market Harborough had the highest reported levels of quality, whilst Earl Shilton, Thurmaston and South Wigston appear to have fared worst. The pattern was similar for pubs, clubs and bars, though it is notable that Shepshed's position was far better for pubs, clubs and bars than for places to eat.

Town Centre Environment

Table 5

WHETHER RESPONDENTS AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS ABOUT THE CENTRE	Sample base	Disagree strongly (1)	Disagree (2)	Neither agree nor disagree (3)	Agree (4)	Agree strongly (5)	Mean score
		%	%	%	%	%	
The parks are well maintained	3072	3	9	24	44	14	3.61
Street lighting is good	3072	2	11	24	47	11	3.58
Pedestrian signage is relevant, clear and easy to understand	3072	2	10	26	46	12	3.58
Shop fronts are well maintained	3072	3	12	24	48	12	3.57
The centre is well planted in summertime	3072	2	12	27	41	14	3.54
Pavements and walkways are safe and well maintained	3072	2	11	31	44	11	3.50
Pavements and walkways are clean and tidy	3072	2	11	31	44	11	3.44
The design and layout of the centre is attractive	3072	3	17	26	38	13	3.43
Seating in and around shopping areas in well maintained	3072	8	16	27	38	9	3.25
The public toilets are clean and tidy	3072	10	14	27	30	8	3.15
There is sufficient seating in and around the centre	3072	11	22	20	39	6	3.07
There are enough public toilets	3072	10	18	27	30	7	3.07
The baby changing facilities provided are clean and tidy	3072	9	9	21	21	5	3.04
There are enough baby changing facilities	3072	9	13	21	19	5	2.98

Table 5 provides the opinions of town and village centre users on a whole range of environmental and service issues. In almost all cases, there is a strong balance of respondents in agreement with what is usually a positive statement about the town or village centre in which they were questioned. There were particularly positive views about pavement, parks and shop front maintenance, street lighting, pedestrian signage and summer planting. In contrast there appears to have been concern about:

- The amount of seating in and around centres, with a third of respondents expressing dissatisfaction – whilst nearly a quarter were also concerned about the quality of maintenance of the seating which does exist;

- The number and cleanliness of public toilets both evoked some concern, with around half of respondents either unhappy or neutral about both issues;

- Amongst those who had the knowledge to comment, there was also significant concern about the number and cleanliness of baby changing facilities, presumably linked to the above concerns about public toilets.

Table 6 provides a similar set of satisfaction scores, but this time focusing on traffic and retailing issues. Particular points to note include:

- There were generally strongly positive opinions expressed about a number of traffic related issues, notably the ease with which road networks provide access into centres, the levels of maintenance of roads in centres, the road signs which allow traffic to access centres, and the ease with which drivers can find car parks in the centre;

- There was however also a strong positive balance of respondents who felt that roads in centres were congested, whilst there was a substantial minority who felt that there was not enough car parking available, and a third who felt that car parking cost too much;

- Positively, despite generally positive views about vehicle access to the centres, most agreed that centres were places that people could walk around without feeling threatened by traffic – suggesting that good vehicular access has not been at the expense of pedestrians;

- However, there were more people thinking that traffic noise in centres is a problem than felt the opposite, and overall this was seen as a greater problem than noise from other sources in the centres;

- More than half of respondents felt that the level of service in shops was of a high standard, and centres were accessible for disabled and older people, but most also agreed that centres needed both more high street chain stores, and more local independent shops.

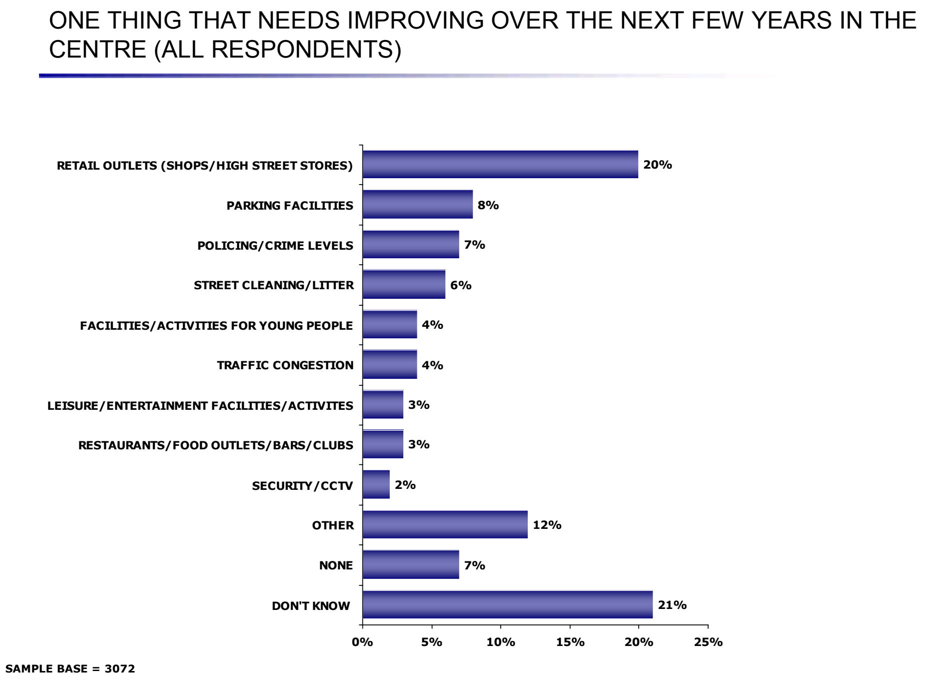
Table 6

WHETHER RESPONDENTS AGREE OR WITH THE FOLLOWING STATEMENTS ABOUT ASPECTS IN AND AROUND THE CENTRE OF…

	Sample base	Disagree strongly (1)	Disagree (2)	Neither agree nor disagree (3)	Agree (4)	Agree strongly (5)	Mean score
		%	%	%	%	%	
The centre needs more local, independent shops	3072	4	10	23	42	18	3.63
The centre could do with more high street chain stores	3072	5	13	21	37	22	3.60
Road signs make it easy for cars to access the centre	3072	2	9	26	47	12	3.60
Roads in the centre are well maintained	3072	2	10	27	47	11	3.56
It is easy for drivers to find the car parks around the centre	3072	2	11	26	44	11	3.55
The road network provides easy access into the centre	3072	1	9	29	47	9	3.55
Pedestrians can walk around the centre without feeling threatened by traffic	3072	3	14	25	44	14	3.53
The level of service in shops is of a high standard	3072	3	11	31	42	12	3.50
The centre is accessible for disabled people and older people	3072	4	9	29	41	11	3.50
Roads in the centre are congested	3072	4	15	27	39	11	3.40
There is enough car parking available	3072	9	19	21	33	9	3.17
There is too much traffic noise in the centre	3072	8	23	27	32	10	3.13
Car parking costs too much	3072	13	21	24	22	9	2.92
There is too much other noise (music, pubs and clubs) in the centre	3072	11	30	27	22	6	2.81

What is the one thing which needs improving in the centre?

Figure 26



Respondents were asked to indicate the one thing that they thought particularly needed improving in the centre they were interviewed in, over the next few years. Respondents provided a very wide range of answers, but by far the most common theme was the improvement of retailing facilities, with improvements to parking, policing, street cleaning and litter also cited by significant numbers.

Table 7

AREAS IN THE CENTRE THAT NEED IMPROVEMENTS OVER THE NEXT YEAR	
	%
A greater range of shops	55
More specialist shops	46
The cleanliness and tidiness of the centre	42
More independent shops	32
More leisure facilities	32
Providing more parking	32
Providing more facilities – i.e. seating and toilets	21
Personal safety (e.g. for yourself, your staff, your customers)	20
Longer opening hours for shops	18
Improvements to paving and paths	17
More special events	17
More green spaces	16
Refurbishment and improvement of buildings	16
Improving public transport into the area	15
Physical security (e.g. security of your property)	14
Improved lighting	14
Better facilities to enable disabled access (access ramps, kerb levelling etc)	12
More planting	12
More pubs	12
Reducing access for cars and other vehicles	12
Better signage (street names, direction signs, maps etc.)	10
More bicycle racks	10
Better marketing of the shops and facilities in this centre	8
Fewer pubs	8
Better Christmas lights	7
Other	2
Don't know/no opinion	5

Having been given the opportunity to comment on potential improvements to centres without prompting, respondents were then offered a list of potential improvements, and asked to indicate which from the list needed improvement over the next year.

Once again, retailing issues came top of the list, with calls for a greater range of shops and more specialist shops prominent, followed by the request for greater cleanliness and tidiness in centres (though previous questions have indicated general satisfaction with the current position). Clearly some of the issues proving popular are more in the gift of local partners to deliver than others – but cleanliness and tidiness, parking and leisure facilities, seating, toilets, paths and green space are all issues to which local partners may be able to effect change.

5 Crime and safety

Table 8

AREAS THAT ARE SEEN AS PROBLEMS IN THE CENTRE OF...							
	Sample base	Very big problem (1)	Big problem (2)	Neither big problem nor small (3)	Small problem (4)	Not a problem at all (5)	Mean score
		%	%	%	%	%	
Groups of people hanging round the streets	3072	6	13	20	26	33	3.70
Rubbish and litter lying around	3072	3	14	20	27	34	3.76
Dirty pavements and chewing gum	3072	4	10	19	27	38	3.87
Vandalism, graffiti and other deliberate damage to property or vehicles	3072	3	8	18	30	37	3.94
People not treating each other with respect and consideration	3072	3	7	16	26	43	4.03
People being drunk or rowdy in public spaces	3072	2	8	15	29	41	4.03
Street canvassers	3072	2	8	15	22	49	4.12
Road safety or speeding	3072	2	6	14	28	45	4.13
People using or dealing drugs	3072	2	7	12	22	45	4.15
Personal theft (pick pocketing)	3072	2	6	13	25	46	4.17
Verbal abuse or other aggressive behaviour	3072	2	6	12	24	48	4.18
Fly tipping	3072	2	6	14	23	51	4.21
Property being stolen from a vehicle	3072	2	5	12	25	47	4.21
Assaults and other violent crime (personal robbery, mugging)	3072	2	5	13	25	48	4.22

Vehicles being stolen	3072	2	5	11	24	49	4.25
Aggressive begging	3072	1	4	10	25	55	4.35
Racial harassment	3072	2	3	9	23	55	4.37

Note: A low mean score indicated that an issue is more of a problem. A high mean score indicates that it is not considered a problem.

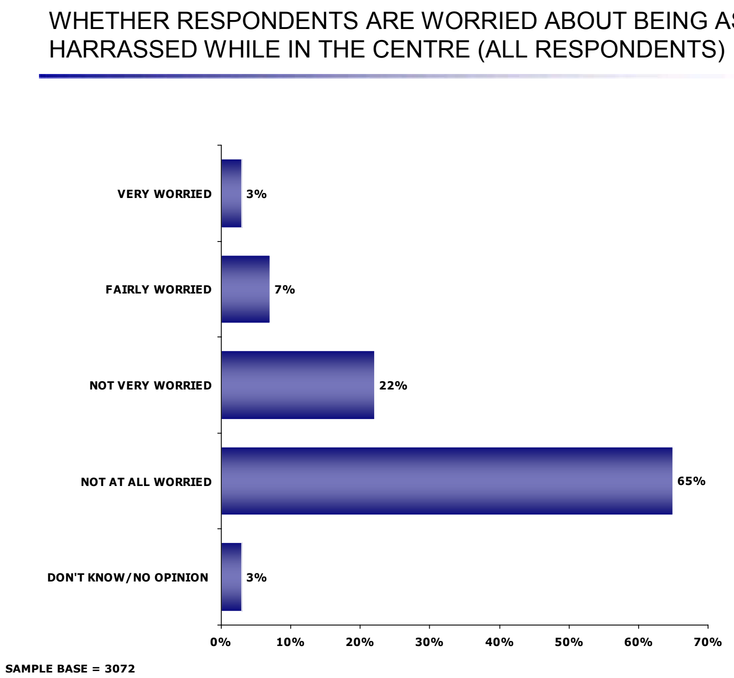
As one of a number of questions about crime and community safety issues in the town and village centres of Leicestershire, respondents were asked which of a series of issues they felt were a significant problem in the centre in which they were interviewed.

It is significant to note that none of the issues respondents were asked to respond to merited more than a fifth describing it either as a very big or big problem. However, the issues described by the largest proportions as a problem were:

- Groups of people hanging round on the streets;
- Rubbish and litter lying around;
- Dirty pavements and chewing gum;
- Vandalism, graffiti and other deliberate damage to property or vehicles.

It is notable that with the exception of the last of the four issues listed above, all are disorder or environmental issues, rather than criminal issues.

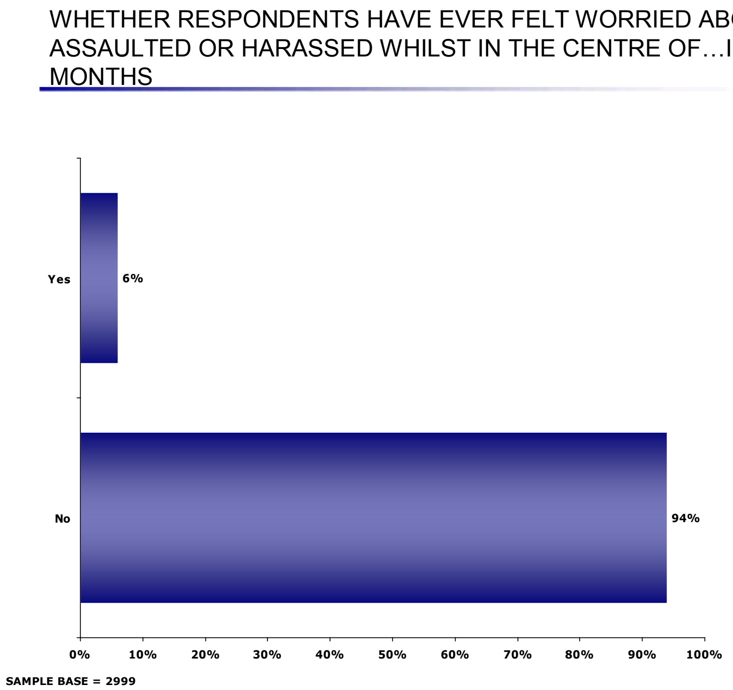
Figure 27



Moreover, as Figure 27 makes clear, very few respondents expressed serious concern about being assaulted or harassed whilst in the centre of the town or village they were interviewed in. However, there were some differences between centres, though no discernable variation on the basis of key demographic variables such as age, gender and ethnicity.

On the basis of this question, people in the centre of Thurmaston feel safest, whilst those in Earl Shilton, Melton Mowbray, Oadby and Shepshed feel least secure.

Figure 28

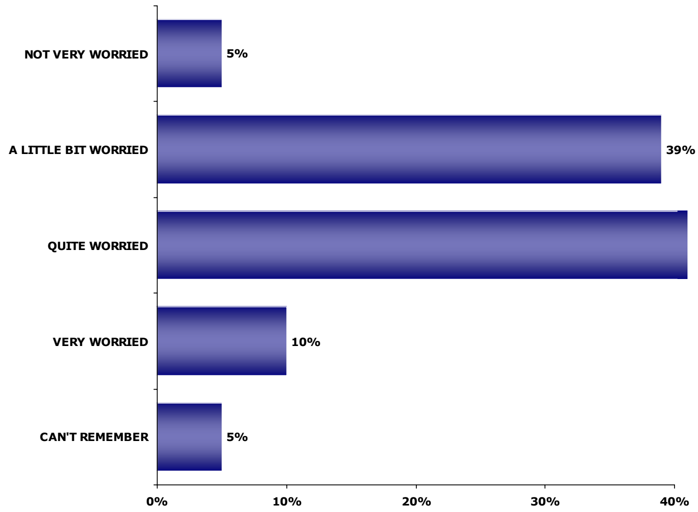


Only a small proportion of respondents (6%) had at any time felt worried about being assaulted or harassed whilst in the centre in where they were interviewed, over the last 12 months. However, in some centres, there was a greater level of concern expressed – 20% of those interviewed in Shepshed, 14% in Hinckley, and 11% in South Wigston had felt worried in the past 12 months, whilst women and non-white respondents also expressed slightly higher levels of concern.

Amongst those expressing concern, the level of concern felt is indicated in Figure 29 below.

Figure 29

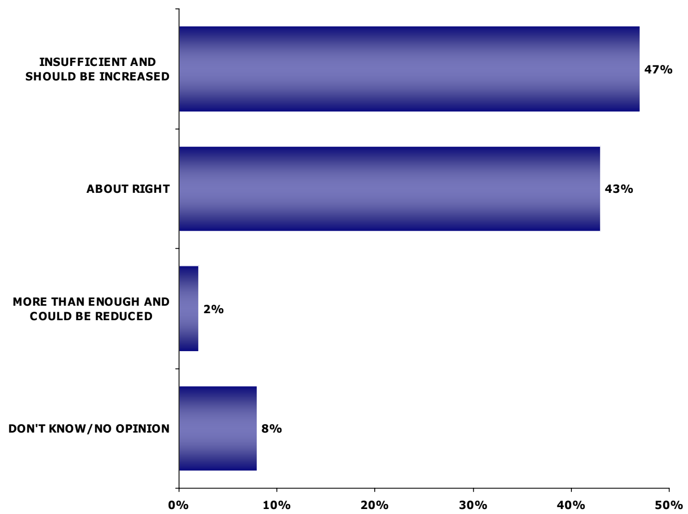
WHETHER RESPONDENTS FELT WORRIED ABOUT BEING ASSAULTED OR HARRASSED ON THE LAST OCCASION



SAMPLE BASE = 191

Figure 30

PERCEPTIONS OF POLICE PRESENCE IN THE CENTRE OF…



SAMPLE BASE = 3072

Nearly half of respondents, 47%, felt that the level of police presence in the town and village centres of Leicestershire was insufficient and should be increased, though 43% felt it to be about right, and about 1 in 50 supported reductions. Calls for greater presence were highest:

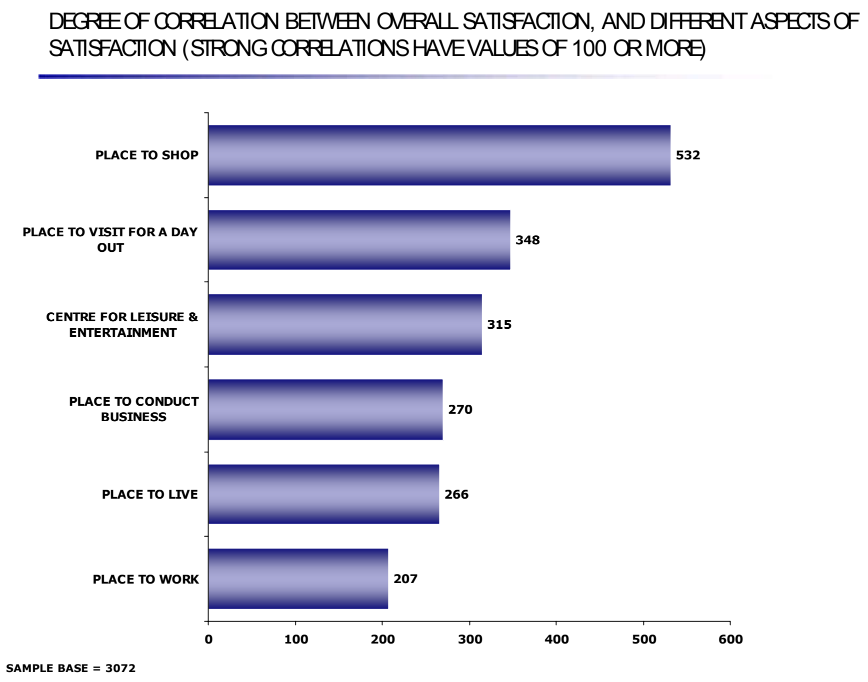
- In Hinckley, Loughborough, Lutterworth, Shepshed and Wigston;
- Amongst older respondents, and increasing steadily with age;
- Amongst white respondents.

6 Factor Analysis of Survey Results

Logistic regression analysis has been undertaken to determine the extent to which satisfaction with key aspects of people's experience of town and village centres in Leicestershire impacts on their overall satisfaction with the centres. In this way, the areas in which improvements are likely to have the biggest impact on overall satisfaction are identified. In effect, this process provides a priority list of issues for policy makers to tackle.

Figure 31 indicates the degree of correlation between Question 37 on the survey questionnaire (Overall how satisfied are you that [PLACE NAME] is a good place to shop, visit, and to do business?) and those parts of Question 16 which assess levels of satisfaction with each town of village centre as a place to live, visit for a day out, work, shop, as a centre for leisure & entertainment, and as a place to conduct business. Clearly each of these factors is important is determining overall satisfaction, since there is a positive correlation between all these six elements and overall satisfaction, though the degree of correlation varies.

Figure 31

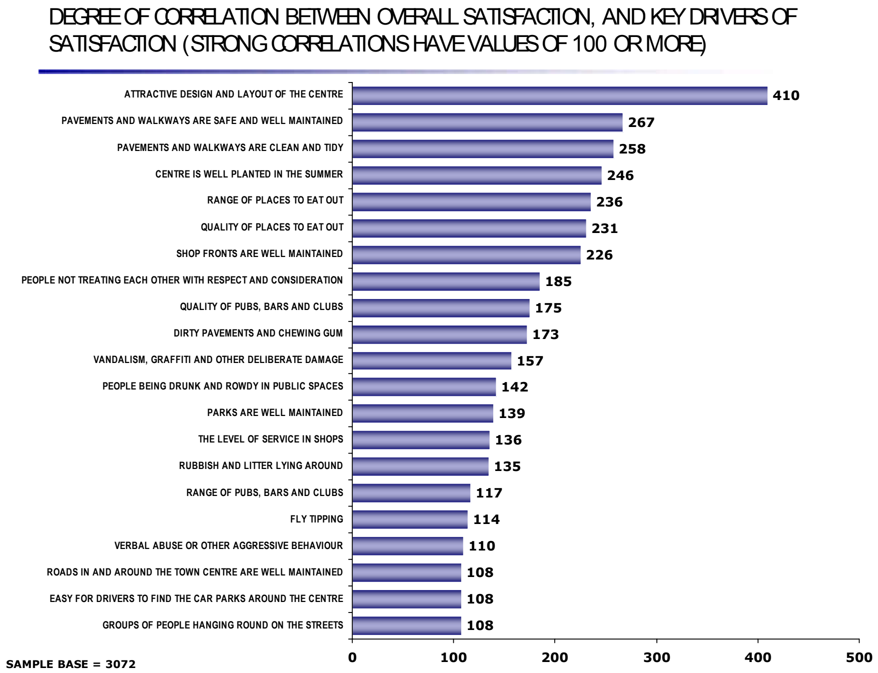


Clearly, it is their view of a place as a shopping centre which shapes most strongly respondents' overall level of satisfaction with a centre. This is not surprising, since the survey tells us that the primary purpose of the majority of respondents was a shopping trip, and what they would see as most important to improve was the retail offer of the centre. In contrast, fewer respondents lived or worked in the centres, so in relative terms these factors were less important, though they still have a strong bearing on overall satisfaction.

It is notable that how people view a place as a potential visitor attraction is strongly correlated with their overall satisfaction – suggesting that working to make centres attractive to visitors may bring wider dividends.

Finally, third most important is people's view of places as centres for leisure and entertainment – and since this is an aspect of the Leicestershire centres that our survey suggests is relatively poorly catered for, tackling this aspect of a centre's offer may well have a positive impact on how the centre is viewed overall.

Figure 32



The second chart, Figure 32, illustrates the strength of correlation between overall satisfaction, and a whole range of aspects of the town and village centres which respondents were asked to provide opinions on in the course of the survey.

At the top of the chart are seven issues which are very strongly correlated to overall satisfaction, and addressing these in effective policy interventions is likely to impact strongly upon people's overall perception of a centre – in other words, these are the issues most worth addressing if overall satisfaction with a centre is to be increased.

Whether or not centres are perceived to have an attractive design and layout is to some extent a result of the historical pattern of streets and buildings over time, and cannot easily be altered wholesale. However, the fact that this is the factor most closely related with overall satisfaction does underline how important matters of architecture and streetscape are. This should be borne in mind when planning new buildings or redevelopments of parts of centres, since the aesthetic quality of what is built matters hugely.

The standard of pavements and walkways – both in their overall level of maintenance, and their cleanliness – is also a key driver of overall satisfaction with a place. This is something which is generally well regarded in the Leicestershire town and village centres, though respondents have indicated that cleanliness, in particular, is an area where there is always room for improvement. As many centres have long understood, the quality of summer planting is also critical to the overall view of a place, and again, this is something that respondents tend to feel town and village centres in Leicestershire do relatively well. The maintenance of shop fronts also appears to be critical.

Clearly too, whilst both the quality and range of places to eat and drink have a bearing on overall satisfaction, places to eat are significantly more important.

Of the remaining issues, which are significant, but not pre-eminent in determining satisfaction, some are crime and disorder issues (of which the most significant is civility – whether or not people treat each other with respect and consideration, followed further down by the level of service in shops) followed by vandalism and graffiti, and public drunkenness). Other are what can broadly be termed environmental issues, of which the cleanliness of pavements, particularly pertaining to chewing gum, the quality of maintenance in parks, and rubbish and litter, are the most significant. It is perhaps reflective of the generally low level of concern about crime in the centres that issues of criminality are not hugely significant. Similarly, traffic issues only feature modestly, in the form of road maintenance and the accessibility of car parks. Traffic noise and congestion appear to have no bearing on overall satisfaction assessments, along with other issues that people have raised as being of concern, such as the condition of public toilets. In effect, people may wish to see less congestion or cleaner toilets, but it does not appear to impact on their overall assessment of how satisfied they are with a centre.

7 Measuring Change – Using the Survey to Inform the LAA

Using Survey Statistics to Measure Change

The reliability of survey statistics is directly dependent upon the total size of the sample, and in order to be sure that two successive surveys record change, the change in the statistic recorded (the percentage of respondents saying they do or don't do something for example) must exceed the theoretical margin of error for *both* surveys taken together. Thus if for a given sample size (we use 3000, the target size for this survey in our example) the theoretical margin of error is ±1.8%, then to show change between two surveys, the change in the measured figure must be at least 2.6%. Clearly therefore there must be sufficient time between survey iterations for sufficient change to take place – frequently this is a matter of judgement, but in the sort of issues with which this survey concerns itself, significant change is likely to be something which will occur over years rather than months.

There are two further caveats to this. Firstly, that since the statistical accuracy of survey data increases with sample size, the margins of error will be much larger at the settlement level than they are at the county level – and measuring statistically reliable change will be very much harder at the settlement level than at the county level, because sample sizes are very much smaller. For many settlements, change is only ever likely to be noted at an indicative level – that is, change will be apparent in the figures, but it will not be possible to prove statistically that this change definitely is the product of more than normal random variations in survey responses.

Secondly, it is important to note that the margin of error is smaller for strongly polarised results than for ones in which the answers are split more evenly. As an example, for a sample of 3000, if 1% answer yes, and 99% answer no to a question, then the margin of error at the 95% level is ±0.4%, and it would only take a change to an answer of 0.5% or less, or 1.6% or more for this statistic at a subsequent survey of the same size for that change to have statistical significance. In contrast, if 50% answer yes and 50% answer no, then the equivalent margin of error would be ±1.8% - and it would take a change down to 47.4% or up to 52.6% (±2.6%) in a subsequent survey to indicate change on which we could rely statistically. Hence, in measuring change, it is better to measure something where answers are strongly polarised than something where answers are evenly divided, since it will be far easier to identify statistically reliable change in subsequent surveys. This is to some extent counter-intuitive, since we tend instinctively to think that 50% of people saying something is more reliable than 1% saying something, simply because there are more of them (neglecting the fact that if 1% say one thing, then in statistical terms, 99% of people say the other).

Clearly this is complex for lay readers to grasp, and therefore in laying out our advised approach for measuring change using this survey data, we have simply advised the measure to use, and the level of change required for a sample of 3000. Policy makers and those setting targets will then need to make an informed judgement as to how long it will take policy interventions to impact to the degree required – and hence the time interval required for measuring change. We would advise that this interval is not less than two years, and may need to be three years depending on the projected speed of impact of intervention.

The LAA Themes

The ITT for this project indicated seven LAA themes for which information from this survey would be used, these being:

- Safer communities;
- Stronger communities;
- Children and young people;
- Older people;
- Health;
- Economic development;
- Cleaner / greener.

We have selected measures from this survey in the subsequent tables for each of these seven themes, and have in each case described the measure, provided its level from this survey at the county level, indicated the level of confidence pertaining to the statistic from this survey, and indicated the level of change which would be significant in a subsequent survey of 3000 responses at county level.

Measures of change for each LAA theme

Safer communities

Measure	Current position %	Current margin of error	Level of change required for significance in a subsequent survey of 3000 respondents	
			Down to	Up to
Proportion of respondents agreeing that the town or village centre is safe	69.1	±1.6%	66.7	71.5
Proportion of respondents very or fairly worried about being assaulted or harassed whilst in town or village centres	10.4	±1.1%	8.9	12.0
Proportion of respondents agreeing that the following are a big or very big problem: - Groups of people hanging round on the streets	18.2	±1.4%	16.2	20.2
- Rubbish and litter lying around	17.0	±1.3%	15.1	19.0
- Dirty pavements and chewing gum	14.0	±1.3%	12.2	15.8
- Vandalism, graffiti and other deliberate damage to property or vehicles	11.1	±1.2%	9.5	12.8

Stronger communities

Measure	Current position %	Current margin of error	Level of change required for significance in a subsequent survey of 3000 respondents	
			Down to	Up to
Proportion of respondents agreeing that the town or village centre is friendly	73.5	±1.5%	71.2	75.7
Proportion thinking the town or village centre has got better in the past 12 months	30.2	±1.6%	27.9	32.6
Proportion of people thinking that the town or village centre is a good place for disabled people	51.2	±1.8%	48.6	53.8
Proportion of people thinking that the town or village is a good place to live	64.4	±1.7%	61.9	66.8

Children and young people

Measure	Current position %	Current margin of error	Level of change required for significance in a subsequent survey of 3000 respondents	
			Down to	Up to
Proportion of people thinking that the town or village centre is a good place for young people	41.0	±1.8%	38.5	43.5

Older people

Measure	Current position %	Current margin of error	Level of change required for significance in a subsequent survey of 3000 respondents	
			Down to	Up to
Proportion of people thinking that the town or village centre is a good place for elderly people	65.0	±1.7%	62.5	67.4

Health

Measure	Current position %	Current margin of error	Level of change required for significance in a subsequent survey of 3000 respondents	
			Down to	**Up to**
Proportion of people walking or cycling into town and village centres	29.2	±1.6%	26.9	31.6

Economic development

Measure	Current position %	Current margin of error	Level of change required for significance in a subsequent survey of 3000 respondents	
			Down to	Up to
Proportion of visits to town centres for tourism	6.0	±0.8%	4.8	7.3
Proportion of visitors staying in town or village centres for an hour or more	49.6	±1.8%	47.0	52.2
Proportion of respondents attending a recent event in a town or village centre	12.3	±1.2%	10.6	14.0
Proportion of respondents agreeing that the town or village centre is busy	58.3	±1.8%	55.8	60.8
Proportion of people agreeing that the town or village centre is a good place to work	56.5	±1.8%	53.9	59.0
Proportion of people agreeing that the town or village centre is a good place to shop	62.5	±1.7%	60.0	65.0
Proportion of people agreeing that the town or village centre is a good place to conduct business	50.9	±1.8%	48.3	53.5
Proportion of people agreeing that the town or village centre is a good place for a day out	58.6	±1.8%	56.1	61.1
Proportion of people agreeing that the town or village centre is a good place for leisure and entertainment	49.4	±1.8%	46.8	52.0
Proportion agreeing that the market in the town or village centre has improved in the last year	37.5	±1.8%	35.0	40.0
Proportion of respondents who believe that the town or village centre meets their shopping needs	45.6	±1.8%	43.1	48.2

Cleaner / greener

Measure	Current position %	Current margin of error	Level of change required for significance in a subsequent survey of 3000 respondents	
			Down to	Up to
Proportion of people using a car to access town and village centres	55.2	±1.8%	52.6	57.7
Proportion of respondents agreeing that the town or village centre is tidy	58.5	±1.8%	56.0	61.0
Proportion of respondents agreeing that the town or village centre is attractive	57.7	±1.8%	55.2	60.2
Proportion of respondents agreeing that there is sufficient seating in and around town and village centres	44.8	±1.8%	42.3	47.4
Proportion of respondents agreeing that pavements and walkways in town and village centres are clean and tidy	54.9	±1.8%	52.3	57.4
Proportion of respondents agreeing that shop fronts are well maintained in town and village centres	60.8	±1.8%	58.3	63.3
Proportion of respondents agreeing that street lighting in town and village centres is good	58.5	±1.8%	56.0	61.0
Proportion of respondents agreeing that public toilets in town and village centres are clean and tidy	38.4	±1.8%	35.9	40.9
Proportion of respondents agreeing that there is enough car parking available in town and village centres	42.3	±1.8%	39.8	44.8
Proportion of respondents agreeing that roads in town and village centres are congested	50.3	±1.8%	47.7	52.9
Proportion of respondents agreeing that there is too much traffic noise in town and village centres	41.3	±1.8%	38.8	43.8

8 Conclusions

It is clear that overall, there is general satisfaction with the centres across Leicestershire – levels of reported satisfaction are on average quite good (though not outstanding) and overall, centres are thought to be improving. However, what is notable is the very wide variation between those centres that tend to score highly on most measures, and those that appear to be very much more poorly thought of. This doesn't appear to be a product of size – some smaller centres are well regarded, some larger centres less so – but is more likely to relate to a range of factors, some of them less tangible than others.

This survey gives a great deal of useful information as to the factors and issues which may shape these overall assessments, and future policy decisions will need to take into consideration those issues in individual town and village centres which the survey reports as problematic and poorly regarded. Certainly some, but not all, of these issues, will be those which public policy and intervention can tackle, either directly or by supporting partners such as chambers of trade and local voluntary groups. It is unlikely that in some of the less well regarded centres, South Wigston or Shepshed for example, the solution will lie with just one issue, and it is far more likely that concerted effort on a number of fronts, within the context of clear plans for centre development and promotion, will be required. Clearly too, there are centres which are very highly regarded, and it may be that understanding what they do well, and the key factors which influence that, will be helpful in guiding some of the other centres in tackling their problem issues.

Centres clearly fulfil important roles for their communities, and are important as shopping centres, for service delivery (financial and personal services for example, such as banking and hairdressing), and in providing entertainment and cultural activity. A number of conclusions rest on defining and understanding the role of centres.

Centres are commended for many factors – signage, maintenance of pavements and roads, street lighting and summer planting – and these are strengths which need to be maintained. Moreover, some of these issues, such as the condition of pavements, and the quality of summer planting, are strongly predictive of people's overall level of satisfaction – in other words, consciously or sub-consciously, these are the issues on which people base their overall assessment of a place.

However, there are also clear issues where centre visitors and users are less satisfied, and where local partners may wish to look to service improvements. Whilst respondents profess to be happy with levels of cleanliness, there remains some concern over some aspects of this, such as gum, and improvements in cleanliness and tidiness score quite highly on the respondents' wish list. Other issues which may need to be addressed include seating in centres (both in terms of the volume, and its maintenance), and the number and cleanliness of both public toilets and baby changing facilities – since substantial concern was expressed about each of these issues.

For each centre, the survey provides a wealth of information for local partners about the issues which most concerned respondents. These might be priorities for improvement, resources allowing.

Overall, centres are relatively well regarded in terms of the way in which they deliver their functions. However, there is only lukewarm approval for the range and quality of eating and drinking establishments, and the least regarded function of the centres is their role as places for culture and entertainment. Clearly, these are small centres, and with one or two exceptions, the amount of cultural and entertainment activity which can be economically sustained will be limited – and larger centres will always be able to offer more in terms of larger venues and facilities. However, there does seem to be a clear opportunity here, which relates, the cultural offer to food and drink, to local distinctiveness and to local economic sustainability. Moreover, the range and quality of places to eat, in particular, is strongly predictive of overall satisfaction, and clearly, improvements to these two issues can have a big impact on wider perceptions of a place.

What these centres will not offer, and cannot offer, is a 'big city' range and style of services, and most visitors will not expect this. What they can do, however, is offer visitors a memorable and distinctive experience, even whilst delivering apparently fairly humdrum services like convenience shopping. These centres can offer a sense of place, of local distinctiveness and difference, which makes visitors want to come back, and which makes people want to stay longer. This may encompass a whole range of things – distinctive local specialist shops for example, in some places picking up on local food or drink themes, small music or other performance venues, creativity and variety in the choice of places to eat and drink, and small enhancements to the street scene and street furniture which make it more pleasant to spend longer and do a little more.

Local events were clearly only attended by a minority of visitors, but they do much to shape local identity, and can encourage both additional trade and a sense of self-confidence. There is clearly an appetite for more specialist markets, such as farmers' markets and continental markets, and this may be part of the enhancements which centres may want to try and encourage. Small centres like these, with robust voluntary effort and determination, and the active support of local partners, can even run local arts or cultural festivals. The important thing is to build on existing strengths, enhance distinctiveness, and work with what makes places unique, rather than trying to emulate everything that makes another place distinct.

It is an intriguing finding of the survey that one in fifty people in the centres at any time are likely to be visiting that place for the first time. This is a tremendous opportunity for those centres able to capitalise on it. Those concerned with the future of each centre need to ask what it is that will make that visitor want to return again, or conversely, what will make them vow never to return. For each centre, the answer will be different. Overall however, it appears clear that people make judgements about a place on some key issues – its overall design and layout quality, for example, is key, as is the state of pavements, the quality of summer planting, shop front maintenance, and the choice and quality of places to eat. Our analysis suggests that if these are right, this will go a long way towards delivering an overall positive impression which will encourage return – and clearly if they are wrong they will be the issues which will tend to guarantee that visitors won't be back again.

Retailing is clearly critical to every centre, and is the primary function which draws people into the centres, albeit that whilst they are there, they will combine this primary activity with others. There is evidence of some difference of opinion between those who feel that centres need more local, independent outlets, and those who fell that the addition of more familiar high street names would help. In each context, there will be no 'one size fits all' solution, and each centre will need to find its own balance and market niche – but clearly there is an extent to which moving towards independents or encouraging more chain stores are mutually exclusive aims. Major high street names can help to 'anchor' a centre, and for the larger centres such as Loughborough, are an essential part of the mix which ensures their role as major centres for comparison shopping. However, if centres are to create the sense of place and distinctiveness which we discuss above, then this is more likely to be delivered through sound, local, independent retailers and service providers, which attract visitors on their own merits, and will encourage people into the centre because they have their own reputation for the quality or for the uniqueness of what they offer.

It is clear that overall, there is approval for the way in which centres cater for the car – signage and parking does not appear to be an overwhelming problem, whilst in general centres appear to manage the potential conflict between pedestrians and vehicles well, such that vehicles can gain access, but pedestrians do not feel threatened by vehicles. Moreover traffic issues, like crime and disorder, re not hugely significant in shaping overall impressions of centres. A minority, however would prefer more and cheaper parking, and improvements to these aspects of the visitor experience are relatively high on our respondents' wish list. Likewise it is important to note that the survey tells us that traffic is the biggest source of noise pollution in centres, and that many of the centres suffer from traffic congestion.

How to deal with the car is therefore an important issue. More than half of visitors arrive by car, and in rural areas, there will be little alternative for many visiting their local market town. Sustainability aims are unlikely to sit well with increases in car parking or reductions in the price of parking, but each centre will need to find its own balance between encouraging visitors and allowing access for those who can only realistically arrive by car, and wider aims to reduce carbon emissions.

Nevertheless, the number of visitors arriving on foot is encouraging, even if it does reflect both the timing of the survey, in summer, and the small size of many centres. Those concerned with town centre policy will want to ensure they do everything which encourages access on foot, and makes it a pleasant and safe experience. Some centres may wish to reflect on whether the encouragement of 'park and stride' – an approach widely discussed in relation to travel plans for schools – might offer a way forward which limits car use and congestion in centres, whilst working with the apparent willingness of many people to access centres on foot.

In terms of sustainability, the lower proportions of visitors arriving by public transport and bicycle are less encouraging. Clearly for many smaller rural centres, bus services will be limited, and there are much wider network and financial viability issues to be taken into consideration, with which policy makers at county level and more locally will already be working. However, in centres where access on foot seems so popular, there is an obvious opportunity to look at how bicycle access can be enhanced to support sustainable access for those who have too far to travel to walk, but for whom cycling might be a viable and enjoyable option given the provision of safe and clearly identified routes, and safe places to park bikes whilst in the centre.

Finally, it is encouraging to note the relatively low level of concern about crime and disorder issues. Few worry about being assaulted or harassed, and only small minorities report any of a long list of crime and disorder issues as being a significant problem in the centre in which they were interviewed. This is a very positive finding, and clearly safety and lack of crime and disorder are part of the positive offer which centres make. A lack of visible crime and disorder, and an absence of those environmental cues which make centre users and visitors feel threatened – graffiti, vandalism, and on-street rowdiness – will be part of the breadth of experience which makes people want to visit again, visit more often, or to stay longer. Already, crime and disorder issues are generally not significant in shaping overall assessments of centres.

However, there remains concern about some issues – amongst them loitering groups of people, cleanliness issues, vandalism and graffiti. These are more notable in some centres than others, and it is notable too that the fear of assault or harassment, and the recent experience of such events, is more prevalent in some centres. This survey provides clarity about the centres where concern is greater, and about which issues are of particular concern – and this should give local partners sufficient evidence from which to identify appropriate strategies and responses which enhance safety, and the perception of safety.