

Business Economic Impact Survey

Keynsham High Street One Way Trial



Introduction

Bath & North East Somerset Council is currently reviewing the impact of the Keynsham High Street One Way Trial, a transport system introduced to Keynsham in May 2017. As part of the review, the Council's Business Growth Team undertook a survey of businesses on Keynsham High Street and its immediate vicinity from 18 January to 7 February 2018 to inform the wider consultation.

Scope & Methodology

The business survey was undertaken in order to assess the economic impacts of the One Way Trial. The results of the survey should help inform whether the scheme has delivered the economic considerations and outcomes included within the "Temporary One Way Trial, Keynsham High Street" report for Single Member Decision 17 June 2016: -

[Statutory Considerations: improving local economy and environment; improving sustainable growth](#)

[Outcomes: longer dwell time and increased retail spend resulting in increased employment](#)

The scope of the business survey covered footfall into the premises, business takings and changes in employment. The business survey did not carry out any assessment of public realm impacts, dwell time, and perceptions of whether the high street has improved as a whole.

The geographic area for the business survey was as follows: Keynsham High Street, Temple Street, Station Road, Charlton Road (between Keynsham High Street and Ashton Way) and Bath Hill (between Keynsham High Street and Avon Road).

The survey was sector-agnostic; any business falling within the survey boundary could contribute. A paper-based approach to the survey was adopted to maximise the response rate. Survey copies were delivered to each business for completion by the owner or manager, with follow-up visits arranged to collect completed surveys. In the event of any comprehension issues, the Council officer would assist the business in completing their survey. Only one response per business was accepted.

Context

The changing face of the UK high street has been omnipresent in business pages throughout the past decade. The 2008 global recession and ensuing slowdown in UK economic growth combined with the growth in online retail to permanently alter our high streets – the place many people view as the heartbeat of their local communities.

Stores have needed to adapt to changing shopping habits, with customer experience, provenance, uniqueness and no-frills value among the strategies adopted by chains and independents to remain competitive and retain customers. In the last ten years, famous brands including Woolworths, Borders and BHS have gone into liquidation, whilst the high street dominance of traditional shops has gradually weakened against growth in other uses including food and beverage, leisure, charity shops and betting establishments.

The changing nature of high streets has also been exacerbated by the growth in out-of-town retail parks and the relaxation of national planning policy allowing for change of use from retail to alternative uses such as housing.

The Office for National Statistics¹ recently reported the year to January 2018 the Great Britain retail sector saw sales growth of 1.6% in volume terms, which represents a slowdown in year-on-year growth when compared with an increase of 2.4% in January 2017. Higher food store prices over the past 12

¹ [Retail Sales Jan 2018](#), Office for National Statistics

months have led to a 0.9% decline in the volume of food sales, and this has been the major contributor to the overall slowdown in retail sales growth.

Looking at footfall, Ipsos² recently reported year-on-year footfall to February 2018 fell by 6.8% in the UK and by 5% in the South West. Springboard³ reported a 5.2% slump in footfall in December 2017 compared with the previous year, adding that high streets and shopping centres suffered larger declines in footfall than retail parks.

Online retail grew at the much larger rate of 9.1% in the year to January 2018, albeit at a slower rate compared with 19.2% in the year to January 2017. As a whole, online sales now represent 16.5% of all retail sales, compared with 12.8% two years ago.⁴ The ‘threat’ of online retail should also be considered an opportunity; market research agency Mintel estimates that roughly half of all online sales are through the websites of store-based retailers.⁵ Retailers that do not have an online presence and sales platform face the risk of losing further market share to retailers that do.

Economic forecasts for the UK paint an uncertain picture going forward. Sluggish growth in wages and output⁶ (1.5% predicted for 2018) and wages are set against an inflation rate which sits stubbornly above the Government’s target, placing pressure on consumers’ disposable income.

It is against this context of weak economic growth, inflationary pressures, changing consumer behaviours and increased competition that the survey was undertaken in order to help identify the economic impacts of the Keynsham High Street One Way Trial.

Results

The results section of this report presents anonymised and collated survey responses in order to prevent identification of participating businesses’ individual answers.

Completions

A total of 106 surveys were collected from the visited business population of 134. This equates to a completion rate of 79.1%. 326 individual business visits were made, with a number of businesses being visited on five occasions in order to maximise the number of completed surveys.

² IPSOS UK Retail Traffic Weathermap, Feb 2018

³ Springboard Footfall Review 2017

⁴ [Retail Sales Jan 2018](#), Office for National Statistics

⁵ www.mintel.com

⁶ 1.5 % GDP growth prediction by the International Monetary Fund in 2018

Number of businesses identified within survey area	134
Individual business visits undertaken throughout survey	326
Surveys collected	106
Response rate	79.1%

List of respondents to the Business Economic Impact Survey

73 Degrees Bicycles/Coffee	Blades Barbers	Clover Maintenance
Action for ME	Bob The Dog	CM3
Andrews Estate Agents	Boots Opticians	Cocoa Hair Design
Avon Associates Group	Bragg Hair Studio	Coffee #1
Avon House Dental Practice	British Heart Foundation	Coop Funeral Care
Baby & Co	Café Creme	Costa Coffee
Barclays Bank	California Nails	Coventry Building Society
Bargain Booze	Card Factory	Davies & Way
Banable's Butchers	Carquip Spares & Accessories	Dorothy House
Beauty at Serendipity	Chef Wu	Driving Force Recruitment
Bello Capelli	Chick-O-Land Takeaway	G&D Free
Bernard Mealing Foundation	Church's / WH Smiths Local	Gloden Tanning & Beauty
Betfred	Clic Sargent	Go Mobile
Goldcare Professionals	New Look	Special Day & Appletons

Greggs	Norton Tax Shops	Specsavers
Gregory's Estate Agents	Norville Opticians	Star Zecks Shoe Repairs
Hair and Beauty Boutique	Oxfam	Stone Roses
Halifax Building Society	Parsons Bakery	Studio 9 Hair Design
Harvem	Peacocks	Suave Owl
Iceland	Perfect Fit	Tamlyns Barber Shop
Keynsham Fish Bar	Polkadot	Temple St Canteen
Keynsham Hardware	Pomegranate	The Entertainer
Keynsham Hearing Centre	Post Office	The Goldies Shop
Keynsham Pharmacy	Poundland	The Lounge Gents Styling
Keynsham Photo Centre	Reflections Hairdressing	The Nail Boutique
Lace & Grace Bridal Boutique	RM Solutions	The Old Bank
Ladbrokes	Sainsbury's Local	The Trout Tavern
Lavianos	Santander	The Wine Bar
Lloyds Pharmacy	Savannah Studios	Thomas Cook
Longwell Records	Shoe Zone	Timbercraft
Mast Financial Services	Shortcut Barbers	Trevor Goodship & Associates
MDINA	Simply Carpets	Trigaci
MIND	Smart Computers	Trippe of Keynsham
NATWEST	Smith of Keynsham Jewellers	Trojan Blinds
TSB	Tui	Vapour Generation
WF Buss Fruit & Veg		

Results Section 1: Business Demographics

Respondent's role within business

The first section of the survey asked questions about the business as well as the person completing the form. Out of 101 responses to the 'position' question, only seven were not senior decision makers; the overwhelming majority of responses came from individuals that own or manage the business.

Location of business

60.3% of respondents were from Keynsham High Street, with the remaining 39.7% from the immediate vicinity.

High Street	64
Temple Street / Temple Court	23
Market Walk / Market Place	6
Bath Hill	7
Charlton Road / Station Road	6
Total	106

Type of business

Just over a third of survey responses came from traditional shops, covering everything from fashion to electronic cigarettes. The 'hair, health and beauty' category includes pharmacies, opticians, nail bars and hair salons, and was the second best-represented sector, accounting for a fifth of responses. 17% of responses came from commercial service retailers, such as estate agents, travel agents and banks. 13.2% of responses came from the food and beverage sectors: cafes, restaurants, pubs and takeaways.

Retail - shop	38
Retail - charity shop	7
Retail - hair, health and beauty	22
Retail - commercial services	18
Cafe and restaurant	7
Public house	3
Hot food takeaway	4
Offices	5
Other	2
Total	106

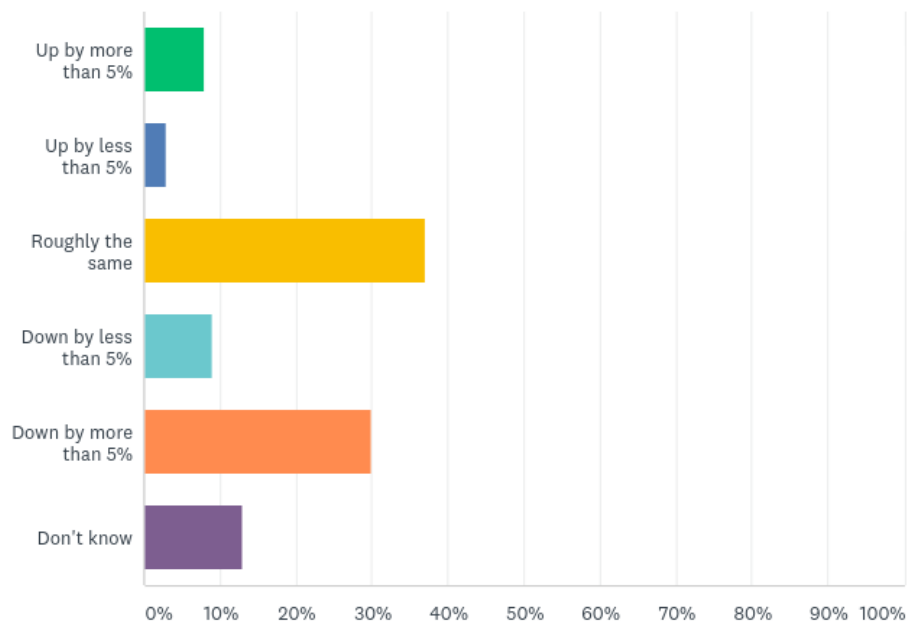
This report will present survey results as a whole in terms of economic impact on business takings, footfall and employment, before reviewing whether these impacts were felt more greatly in different business locations or sectors.

Results Section 2: Impact on Business Takings

This section of the business survey asked respondents for information regarding business takings, how they record their takings, and finally, how they felt the Keynsham High Street One Way Trial had impacted upon their business takings.

Average comparable⁷ monthly takings since the introduction of the Keynsham High Street One Way Trial

Answered: 100 Skipped: 6



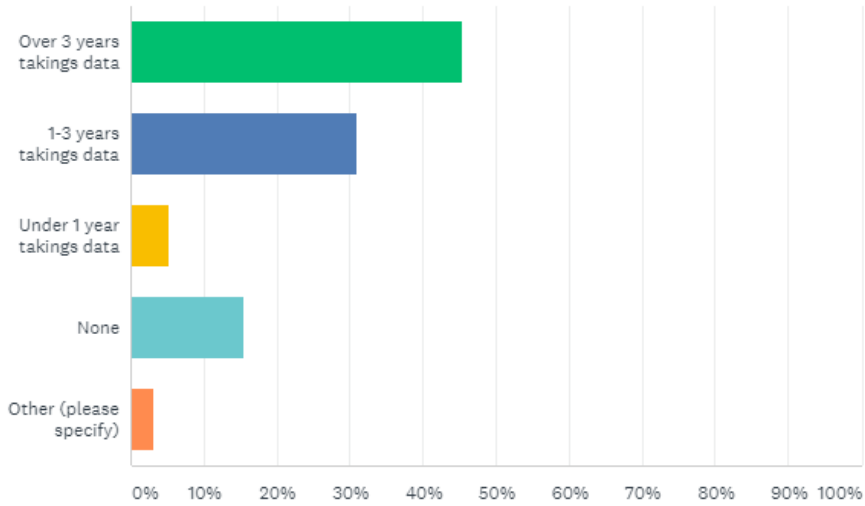
The chart above shows 11% of respondents stated that their comparable takings had increased since the introduction of the One Way Trial in May 2017. 37% stated that their takings had stayed roughly the same, while 39% of respondents stated that their takings had fallen. 8% of businesses had seen a significant rise in comparable takings, whilst 30% of businesses saw a significant fall in comparable takings. It should be noted that the most popular individual response was ‘business takings roughly the same’.

Evidence

The graphic overleaf shows 45.4% of respondents said they had 3 or more years of takings data to evidence their response to the previous question on business takings. A further 30.9% of respondents had between 1 and 3 years of takings data. 15.5% had no evidence on monthly average takings.

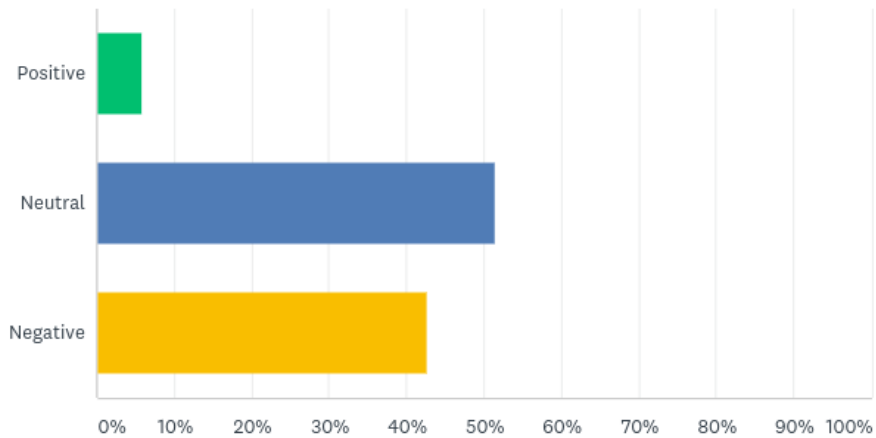
⁷ Respondents were asked to look at comparable takings where possible, i.e. June 2016 vs June 2017.

Answered: 97 Skipped: 9



Effect the Keynsham High Street One Way Trial has had on monthly average takings

Answered: 101 Skipped: 5



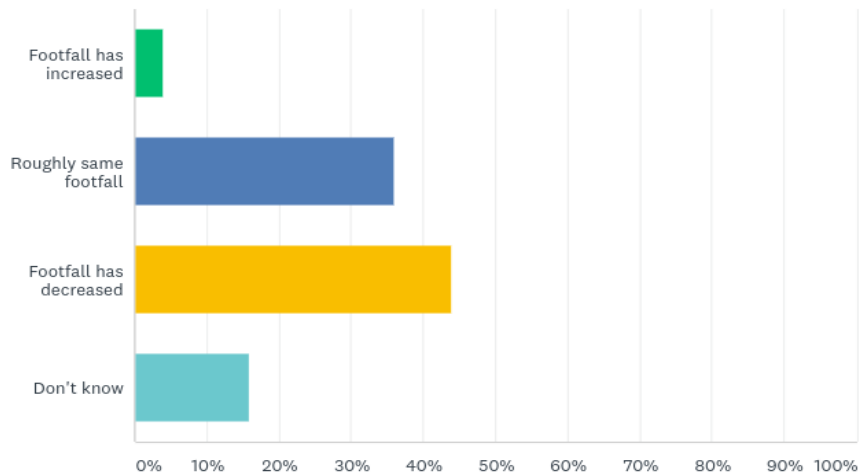
Of 101 business survey responses, 5.9% felt that the One Way Trial had had a positive effect on business takings, 51.5% were neutral and 42.6% of business felt the One Way Trial had had a negative effect on business takings.

Results Section 3: Impact on footfall into the premises

Section 3 of the business survey asked respondents whether footfall into their premises had gone up or down. It asked how this data was collected, and once again asked businesses about the effect of the Keynsham High Street One Way Trial on footfall into their premises.

Average comparable monthly footfall into the business premises since the introduction of the Keynsham High Street One Way Trial in May 2017

Answered: 100 Skipped: 6

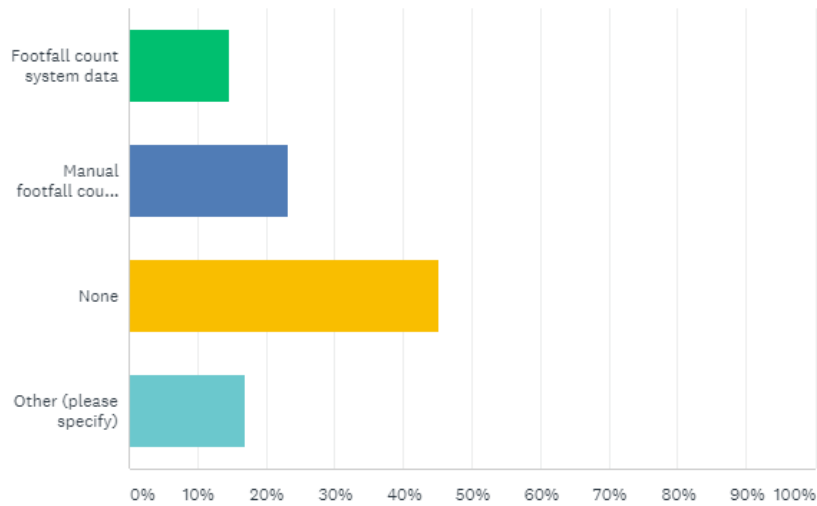


4% of the 100 businesses responding to this question reported an increase in average comparable monthly footfall into the premises since the introduction of the Keynsham High Street One Way Trial, 36% reported comparable footfall into their premises as being roughly the same, and 44% of respondents reported a decrease in comparable footfall. More businesses reported a drop in footfall into their premises than those reporting a drop in business takings.

Evidence

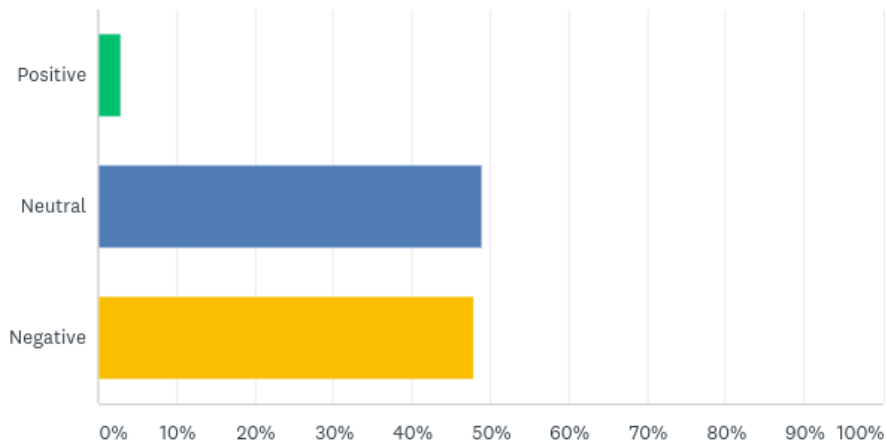
Compared with business takings, fewer respondents had data to evidence their responses regarding footfall trends. Still, 14 respondents had footfall count system data, 22 respondents had manual records while 16 stated they had alternative methods of counting footfall. Alternative methods given included: number of appointments, daily customer transactions, sales figures and general perception of customer numbers. 43 respondents reported no evidence to support their view on footfall trends into their premises. These results are depicted on the graphic overleaf.

Answered: 95 Skipped: 11



Effect the Keynsham High Street One Way Trial has had on average monthly footfall into the premises

Answered: 100 Skipped: 6



Just 3% of businesses responding felt that the One Way Trial had had a positive effect on footfall into their premises. 49% of respondents were neutral, while 48% felt that the trial had caused a negative effect on footfall into their premises. When considering the effect of the One Way Trial, businesses have recorded more negative responses to the footfall section of the survey in comparison to the takings section.

Results Section 4: Impact on Employment

Section 4 of the survey asked businesses about how many full-time-equivalent jobs at the premises before and after the introduction of the Keynsham High Street One Way Trial, and whether they felt the trial had had an effect on their employment levels.

Full-time-equivalent jobs at the premises in January 2016, January 2017 and January 2018

This question received a much lower response rate, with 36 of the respondents completely skipping the question, and only 50 completing jobs figures for all three years. However it should be noted that a significant number of businesses opened after January 2016 so were unable to respond with a full set of figures. Data has been extrapolated to show the number of businesses reporting job increases and decreases for the years Jan 2016 to Jan 2017 and Jan 2017 - Jan 2018.

Pre One Way Trial (Jan 2016 - Jan 2017)

	FTE jobs growth Jan 2016- Jan 2017	Same FTE jobs Jan 2016 - Jan 2017	FTE jobs decline Jan 2016 - Jan 2017
# Businesses	5	35	10
%	10%	70%	20%

Post One Way Trial (Jan 2017 - Jan 2018)

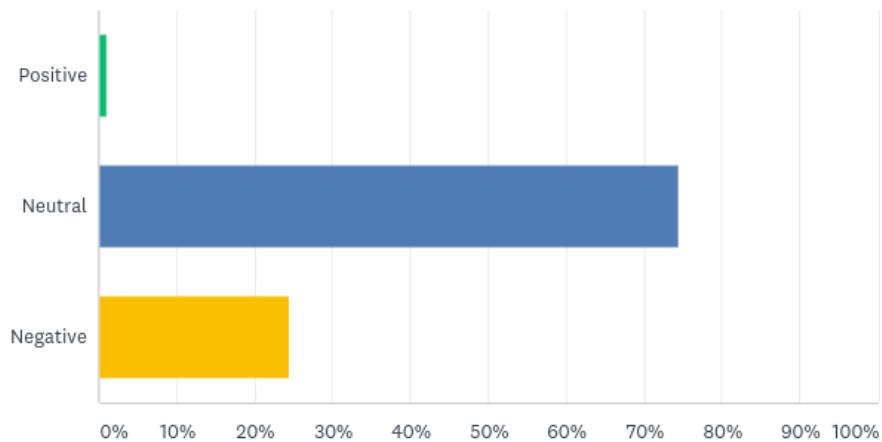
	FTE Jobs growth Jan 2017 - Jan 2018	Same FTE jobs Jan 2016 - Jan 2018	FTE jobs decline Jan 2017 - Jan 2018
# Businesses	6	44	15
%	9.2%	67.7%	23.1%

The tables above show that 70% of respondents reported no change in employment from Jan 2016 to Jan 2017, with this figure dropping slightly to 67.7% between Jan 2017 and Jan 2018. This was clearly the most popular response. More businesses recorded a decline in employment than those who recorded an increase in employment over both time periods, suggesting this trend goes beyond the One Way Trial. There is a slight increase in the percentage of businesses recording a decline in employment in the year the One Way Trial is introduced, but given the sample size caution should be taken as to the statistical significance of this trend.

Effect of the Keynsham High Street One Way Trial on employment at the business premises

A greater number of respondents answered this employment question compared to the previous, 98 responses were received in total. 74.5% of respondents were neutral to the effect of the One Way Trial on employment at their premises, while 24.5% of respondents believed the One Way Trial had had a negative effect on jobs. 1% believed the One Way Trial had been positive for employment at their premises. Compared with the sections on takings and footfall, businesses had far less strong views about the One Way Trial affecting employment levels.

Answered: 98 Skipped: 8



Results Summary

The table below summarises the results of the three 'effect' questions regarding business takings, footfall into the premises and employment detailed above.

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	6	5.9%	52	51.5%	43	42.6%
Footfall	3	3.0%	49	49.0%	48	48.0%
Employment	1	1.0%	73	74.5%	24	24.5%

Results overview by location

At this point the result will focus on the results of the three ‘effect’ questions provided by the survey respondents, regarding business takings, footfall and employment at the premises. The responses have been split into location areas in order to ascertain whether effects of the Keynsham High Street One Way Trial have been felt more strongly in particular areas. Respondents from Keynsham High Street itself will be represented twice in the tables below; either in Keynsham High Street North or South, and in Keynsham High Street West or East. The gravitas of these findings are limited but the relatively small sample sizes per location (5 – 35 businesses).

Keynsham High Street North (northwards towards the A4 from Boots and Grounded)

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	0	0%	19	63.3%	11	36.7%
Footfall	1	3.5%	15	51.7%	13	44.8%
Employment	0	0%	22	73.3%	8	26.7%

Keynsham High Street North was slightly more neutral than the full survey sample with regards to effect of the One Way Trial on takings. Employment and footfall effects were broadly similar.

Keynsham High Street South (southwards towards Bath Hill from The Entertainer and Go Mobile)

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	4	12.5%	13	40.6%	15	46.9%
Footfall	2	6.3%	14	43.8%	16	50%
Employment	1	3.1%	23	71.9%	8	25%

For takings and footfall, Keynsham High Street North was more polarised than the full survey sample and Keynsham High Street North, with a greater percentage share of responses being both positive and negative.

Keynsham High Street West (Bristol side)

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	1	3.6%	15	53.6%	12	42.9%
Footfall	1	3.7%	15	55.6%	11	40.7%
Employment	1	3.7%	21	77.8%	5	18.5%

The west side of Keynsham High Street broadly followed the full sample with regards to effect on takings. The effects on footfall and employment were viewed more neutrally and less negatively compared with the full sample.

Keynsham High Street East (Bath side)

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	3	8.8%	17	50%	14	41.2%
Footfall	2	5.9%	14	41.2%	18	52.9%
Employment	0	0%	24	68.6%	11	31.4%

The eastern side of Keynsham High Street was more positive in terms of effect in business takings than the full survey sample. The effect on footfall was more polarised and the effect on employment more negative.

Overall when reviewing the four locations in Keynsham High Street, there is little to suggest a statistically significant difference in perceived economic impacts of the One Way Trial.

Temple Street / Temple Court

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	0	0%	11	52.4%	10	47.6%
Footfall	0	0%	10	47.6%	11	52.4%
Employment	0	0%	15	79.0%	4	21.1%

Temple Street / Temple Court produced a set of more negative effects for both takings and footfall, compared to the full survey sample. The area was more neutral with regard to the effect of the One Way Trial on employment numbers. No positive impact was recorded by the respondents.

Market Walk / Market Place

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	0	0%	5	83.3%	1	16.7%
Footfall	0	0%	4	66.7%	2	33.3%
Employment	0	0%	4	66.7%	2	33.3%

When compared with the overall cohort, Market Walk / Market Place was considerably more neutral in reporting perceived impact on business takings and footfall. The business mix located on these streets and small sample size both need consideration here before drawing conclusions.

Bath Hill

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	1	14.3%	2	28.6%	4	57.1%
Footfall	0	0%	3	42.9%	4	57.1%
Employment	0	0%	6	85.7%	1	14.3%

Bath Hill recorded more polarised views with regards to the effect of the One Way Trial on takings. Footfall was more negative than the full survey sample, with a more neutral stance on employment effects.

Charlton Road / Station Road

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	1	20%	2	40%	2	40%
Footfall	0	0%	3	60%	2	40%
Employment	0	0%	3	75%	1	25%

Charlton Road / Station Road was more positive on the takings effect, although it should be noted that with such a small survey sample one response can heavily skew the results. The footfall effect was slightly more neutral while employment effects broadly followed the full survey sample.

Results overview by business type

This section once again looks at responses to the three ‘effect of the One Way Trial’ questions, on takings, footfall and employment. This time the results are split by business type in order to assess any variations in effect. Again, gravitas of findings are limited due to smaller sample sizes.

Retail - shop

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	4	10.8%	16	43.2%	17	46%
Footfall	2	5.4%	16	43.2%	19	51.4%
Employment	0	0%	28	75.7%	9	24.3%

Traditional shops (both chain and independent) reported more polarised views on the effect of the One Way Trial on both business takings and footfall. In respect of footfall, more than half of shops thought the One Way Trial had negatively impacted on footfall into the premises. Views on employment effects followed the full survey sample trend.

Retail - charity shop

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	1	14.3%	3	42.9%	3	42.9%
Footfall	0	0%	3	42.9%	4	57.1%
Employment	0	0%	4	66.7%	2	33.3%

Charity shops were more positive in terms of effect on business takings, but more negative on footfall and employment effects. The small survey sample size should be noted for this business type.

Retail - hair, health and beauty

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	1	4.8%	9	42.9%	11	52.4%
Footfall	1	4.8%	8	38.1%	12	57.1%
Employment	0	0%	14	70%	6	30%

Hair, health and beauty retailers had more negative opinions than the full survey sample on all three indicators.

Retail - commercial services

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	0	0%	13	81.2%	3	18.8
Footfall	0	0%	11	73.3%	4	26.7%
Employment	1	6.3%	13	81.3%	2	12.5%

Commercial service retailers, such as banks and travel agents, were considerably more neutral on takings and footfall events, and slightly more neutral on employment effects of the One Way Trial. These commercial services will generally act as destination businesses and are therefore less reliant on footfall and impulsive shopping.

Cafe and restaurant

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	0	0%	3	42.9%	4	57.1%
Footfall	0	0%	3	42.9%	4	57.1%
Employment	0	0%	4	66.7%	2	33.3%

Cafes and restaurants were more negative than the full survey sample on all three indicators. The largest negative percentage point shift came in the effect on takings, although the caution should be taken with regards to this sample size.

Public House

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	0	0%	2	66.7%	1	33.3%
Footfall	0	0%	2	66.7%	1	33.3%
Employment	0	0%	2	66.7%	1	33.3%

Public Houses provided more neutral responses than the full survey sample for both business takings and footfall effects. Employment effects broadly followed the full survey trend, although again the small survey size should be considered here.

Hot food takeaway

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	0	0%	1	25%	3	75%
Footfall	0	0%	1	25%	3	75%
Employment	0	0%	4	100%	0	0%

Albeit with a small sample size of four businesses, hot-food takeaways were considerably more negative in their assessment of the effect of the One Way Trial on both takings and footfall. Every hot food takeaway was neutral when considering effects on employment.

Offices

	Positive		Neutral		Negative	
	#	%	#	%	#	%
Takings	0	0%	3	75%	1	25%
Footfall	0	0%	3	75%	1	25%
Employment	0	0%	3	75%	1	25%

Offices that provided responses to the survey were predominantly more neutral on both takings and footfall effects. This result is unsurprising given that offices will generally be less reliant on footfall and public custom to grow.

Other business type

Only two responses we received in this category, so results are suppressed in order to preserve anonymity.

Additional comments

The final section of the survey allowed for businesses to add further comments about the Keynsham High Street One Way Trial. The full comments are supplied in Appendix 1, sorted by theme. Original copies of the survey responses have been retained.

A wide range of comments were received, with many respondents using the opportunity to expand on reasons why they felt the One Way Trial had effect their business. Businesses that are more reliant on passing trade were far more likely to be negative in their comments, while destination shops and non-retail businesses were more neutral about the scheme. Quite a few suggested improvements to the current road traffic configuration were also put forward by the businesses. The table below highlights a selection of the most popular points raised by respondents, and quantifies the number of individual comments on each subject area. It should be noted that the number of comments received is not indicative of how many surveyed businesses agree with the idea or theme – it is purely an indicator.

Theme	Number of comments
Negative comments about parking for staff or customers	16
One Way System confuses / frustrates / delays customers	13
Retail street quieter / less footfall	13
Concerns about traffic congestion	12
Unaffected by One Way Trial	10
Temple Street negatively affected	8
Suggestion – provide more parking (short and / or long stay)	5
Suggestion – reinstate Bath Hill / Temple St roundabout and two way flow into Temple St	4
Suggestion – reinstate right turn into Tesco at Ashton Way / Charlton Road junction	2
Suggestion – reintroduce 2 way system	3
Suggestion – do not reintroduce 2 way system	2

Conclusion

The Business Economic Impact Survey had the aims of 1) identifying the prevalent economic performance of businesses in Keynsham High Street and its immediate vicinity, and 2) helping identify whether the Keynsham High Street One Way Trial had an effect on business performance. It was carried out in January and February, traditionally difficult months for many retailers, and during a period of unprecedented change and challenge facing high streets in the UK.

The survey achieved a high response rate of around 80%, and to that end the results can be deemed to be representative of the business community within the survey sample area. Around 60% of respondents were from Keynsham High Street itself.

39% of business recorded a fall in comparable average monthly takings since the introduction of the One Way Trial in May 2017 compared with 11% reporting takings growth. This can be considered against a backdrop of (albeit weak) growth of 1.6% in the national retail economy in the year to January 2018.

Furthermore, just 4% of businesses reported an increase in comparable average monthly footfall into their premises since the One Way Trial was introduced, while 44% saw a decline in footfall. This result should however be considered in the context of declining national and regional footfall.

With regards to employment, the underlying trend over the past two years has been a slight decline in jobs, and although the proportion of businesses reporting job losses increased slightly last year, the trend was not significant enough to correlate the introduction of the One Way Trail to jobs losses.

In terms of business' perception of the impact of the Keynsham High Street One Way Trial on their economic performance, the general perception was either neutral or negative for both business takings and footfall into the premises. There was a much weaker perceived connection between the One Way Trial and business employment, with around three quarters of businesses recording a neutral response on the effect of this indicator. It should be noted that more businesses were neutral than negative on all three key economic indicators surveyed.

Businesses that are located in Temple Street / Temple Court and Bath Hill were most likely to be negative about the One Way Trial's effect on their footfall and takings, whilst there was little statistically significant difference in the survey responses from businesses in the northern, southern, eastern or western parts of Keynsham High Street itself.

Businesses in the café, restaurant, health, hair and beauty sectors were more likely to be negative about the One Way Trial's effect on their footfall and takings, whilst business sectors that were less reliant upon

passing trade were far more likely to be neutral in their responses.

In summary, this survey has identified little support for the Keynsham High Street One Way Trial in its current configuration from the local business community. There have been a range of suggested improvements put forward by the surveyed business community to mitigate the perceived effects of the one way system and it is recommended that these are considered in the future traffic system for Keynsham High Street and its immediate vicinity.

Appendix 1 – Full comments from survey respondents

Responses marked with an asterisk* have been edited in order to maintain anonymity

Positive comments

“We haven't been long here enough to compare. We can only go on comments from other traders which have been negative, although as a cyclist I like it!”

“Our sales are up but I would attribute this to changes in our shop. The high street is a more pleasant place to work with fewer cars stationary, air quality feels improved.”

Neutral or mixed comments

“One way trial affected us during the beginning of the trial, and only in the morning between 7-9am. However, our customers adjusted the new changes soon after and if anything, we've gained new customers but lost the same amount. Overall I'd say it doesn't affect us much at all.”

“Unaffected by one way trial. Busier but this is due to another branch closing.”*

“Due to our location we get more traffic drive by which is a positive, but also more people are avoiding the town due to changes and lack of parking.”

“Lesser effect down my end of the high street.”

“We are not dependent on footfall.”

“Unaffected due as our business is based around appointments”

“The bulk of our business is not through the door. No effect”

“Difficult for us to say as we only moved to the premises after the one way system but I am very happy with my position in the High Street.”*

“It has not affected our business but due to the buses it is harder for some colleagues to get here or get here on time due to walking further.”

“Takings - we are too new to compare, but the general consensus amongst other traders on Temple Street is that the effect has been negative. Other businesses seem to think footfall has decreased in Temple Street.”

“Hasn't really had an impact other than initially patients moaned a bit about traffic.”

“Too soon to comment on comparable takings and footfall. We opened in spring 2017 and the business has grown in that time, but that is normal for a new business. Parking is a problem. We are open 7 days per week as well as late into the evening, and it is hard for customers who are often ill, old or infirm to park close by.”*

“The one way system does not seem to have affected our business at all. Although we preferred the 2 way as we see the congestion along Temple Street, Ashton Way down Bath Hill all the way up to the Wellsway on a morning is ridiculous.”

“Part of the business is a destination shop, and that element of the business is busier. Another part of the business relies on footfall, passing trade and impulse shopping. That element has seen a loss in takings.”*

“Footfall has been boosted by growing loyal customer base, but number of walk-ups has gone down since the one way trial started - I think this is due to being cut off by the road system. Cutting Temple Street off was a big mistake, I like the one way system besides that.”

“We are specialised, people don't just walk up the High Street but seek us out. I feel sorry for other shops that rely on passing trade - they have missed out on custom due to the one way system. “

Negative Comments

“Traffic congestion making life difficult for employees. Couples with no civic centre parking. Staff having to come in 45 mins early to get parking space in Bath Hill car park. Also traffic almost always at a standstill on Bath Hill waiting for traffic lights on Temple St and Rock Road.”

“As an appointment only store, we don't rely as heavily on passing trade as other local businesses. However, the one way system has affected our business in that many of our customers are travelling to Keynsham, sometimes for the first time, and find the road layout confusing as they cannot continue along the high street to drive directly to our store and have to drive along Bath Hill instead and end up lost or having to turn around to navigate back towards the high street. This is often resulting in customers arriving late for appointments which has a negative impact on our business.”

“I agree with concept of the system, but there is a negative effect on Temple Street. No access unless you drive to mini roundabouts, and people have informed me they get confused and put off. We used to have more footfall.”

“Difficult for takeaway delivery rounds. Also fewer customers. People use A4 road now instead of coming into Keynsham High Street.”

“Since the one way system: footfall to our shop is down. Wednesday we took just about £180 which is a joke - how are we supposed to pay our high rates, rent and staff etc. Some days it’s like a ghost town in afternoons. We have noticed a huge difference all round.”

“We don't get as many walk-ins and the street is generally quieter. We have noticed a decrease in footfall and the number of people just dropping in to make appointments.”

“As a business we are not directly involved and rely on direct footfall into our business address. There has been an impact on staff parking due to changes in permits. Our parking bill has doubled as a result. It has gone too far on short-stay parking.”

“Clients that come to us say that they are not stopping in Keynsham, no variety, difficult to park and the traffic congestion is horrendous.”

“Takings had dropped by 40% since February 2017. Customer feedback in store, complaining about lack of parking. Customer feedback - avoiding Keynsham due to disruption of roadworks followed on by new one way system. Clients avoid Keynsham and choosing alternative venues with more easy flow of traffic and parking.”*

“Unable to answer majority of survey questions due to the nature of the business. Customers regularly are late for appointments due to being delayed in traffic jams. This is mainly from traffic backed up from the high street going towards Bath Hill. Caused by the traffic light at High Street/Bath Hill junction and the inability for traffic to go straight across there. All traffic now has to go down Bath Hill and back to access to far end of the High Street (past Sainsburys).”*

“The idea of making the High Street into a one way system was to reduce the traffic and as a result less air pollution, when in fact the traffic has increased by 2 1/2 times in order to make its way out of Keynsham therefore defeating the object. We have been in Keynsham for 28 years and have never experienced any problem with traffic. As a high rate payer it would seem money has been wasted to achieve very little improvement. Air pollution may be reduced in one place and it’s then directed elsewhere.”

“Less footfall and traffic down Temple Street (passing trade) due to no admittance from High Street. More queues at Bath Hill (uphill), Ashton Way (both ways) and Avon Mill Lan (both ways)... frustration and avoidance of Keynsham and Temple Street. Comments made regularly about avoiding Keynsham and frustrations about making u-turn to get to Temple Street. Also the poor pedestrian crossing placing. “

“Parking is very difficult for customers and staff. “

“Overall negative impact on High Street trading. Negative - with no right turn to Temple Street and no left turn from Charlton Road to Tesco. Impact of traffic layout at Temple Street and Rock Road on vehicular movements at peak times.”

“Why Would BANES take the decision to stop traffic going straight across from the main High Street to Temple Street, therefore avoiding the businesses?! Customers are saying that they "will not" be coming to Keynsham again for a very long time, as they are being directed towards Bath from the High Street. You allow business so why not cars?! Just does not make sense. All businesses are suffering, and one has actually gone and closed down, thank you BANES!!”

“We've witnessed 3 car crashes within a day outside of our shop. One bollard has been knocked over.”

“Wasn't here before the one way system so can't comment, but from living in Keynsham for 22 years the one way system has made navigating the high street difficult. Parking is an issue for staff. One way system is not working well for footfall at the moment.”

“I speak to clients every day. No one can park. I think no one listens and all we need to help shops is better parking.”

“We have lost on average £1,500 - £2,000 PER WEEK. No footfall. All our customers hate it. I have been in business here for a long time and I can honestly say I have never seen the high street so desolate. All of our customers complain they struggle to get into the high street and when they can, they can't park. Since the introduction of the one way system we have lost between £1.5k and £2k per week! Things are beyond desperate. I am saddened that my life's work seems to be in tatters through no fault of my own.”*

“Some customers say they do not visit as often as before, due to the one way system.”

“General decline in footfall. We still have a good business, but have noticed that some of our regular customers are not coming into town as often as they used to. High Street is quieter, parking is still an issue.”

“We have only been open a few months, customers feedback is that the one way system has made things worse. It is inconvenient for workers. “

“People are fed up of coming into Keynsham and finding they have to go round in circles to get from one end of the high street to the other. People are frustrated and would rather go and park up straight away with no hassle at shopping centres. Our high street is dying!”

“General walk-ins have decreased.”

“We feel the layout of the one way system could work better. We also feel communication could have been better.”

“The system makes it harder to drop off; people have to make large detours to turn around especially from the Bristol side.”

“Feel cut off from rest of Keynsham High Street after one way trial. Traffic lights aren't well synced (Sainsburys to Rock Road). Large backlogs for staff around back of business (Rock Rd / Ashton Way).”

“Customers complain that they can't get parked, are late for appointments and don't know where to get when driving in.”

“The one way system seems to have had a negative effect on my business. Traffic is now very congested and parking is becoming a nightmare.”

Suggestions

“More pedestrian friendly central area of the high street. People need to embrace regeneration on the high street. What we don't need is further disturbance putting it back again.”

“More parking, short and long term.”

“Suggestions: reintroduce 2 way flow on high street with "calming aspect". Allow flow from High St along Temple St. Build Mezzanine floor car park Ashton Way. Introduce long stay rate car parking area. Increase and motivate return of traffic flow + customers to return high street to vibrancy.”

“Please reinstate the High Street / Bath Hill roundabout.”

“Revert junction (Charlton Rd / Ashton) back to roundabout with a right turn.”

“One way system should filter people easily towards the short-stay parking.”

“We would prefer the high street to go back to two way, as we think it will ease the traffic.”

“Not been a problem but putting it back will waste money. Look into supporting local people, kids and the people who are on the poverty line.”

“I think maybe there needs to be a drop off and pick up area on the high street to help people access the high street. Also businesses on Temple Street need to have more traffic flowing.”

“We would prefer 2 way traffic from a business, staff and residents perspective.”

“I feel very strongly money needs to be spent on creating more car parks as staff and clients have problems with this.”

“Parking is the way to make Keynsham better for all of us, but will not happen.”

“A better solution would be to turn the south side of the street into a roundabout with traffic lights (and lane) on Bath end for crossing vehicles.”

“The narrow road by the bus stop is a problem, the bus broke down two weeks ago causing a major tailback. Please widen. No right turn into Tesco at roundabout is another major cause of traffic problems.”

“More parking space are also needed as customers are also struggling to find somewhere to park as most car parks are always full, again resulting in late appointments. We also struggle to park ourselves on a daily basis - designated parking should be provided for business owners.”