The Fitzrovia Partnership

Tottenham Court Road Freight Surveys

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1 Introduction

The West End Project (WEP) is Camden Council's £35 million strategy to improve the area to support the opening of Tottenham Court Road Crossrail station in 2018. Some of the developments include a new two-way traffic scheme on Tottenham Court Road with restrictions for cars, taxis and lorries, Monday – Saturday between 8am – 7pm. As part of The Fitzrovia Partnership's role in Shaping Change in Fitzrovia, this survey has been conducted with businesses directly affected by changes on Tottenham Court Road (TCR) and adjacent streets to help better understand the current pattern of goods and service deliveries and collections.

The survey has been conducted as part of the wider West End development work and is supported by Transport for London. The following data shows the results collected from the 92 premises on TCR responded to the survey.

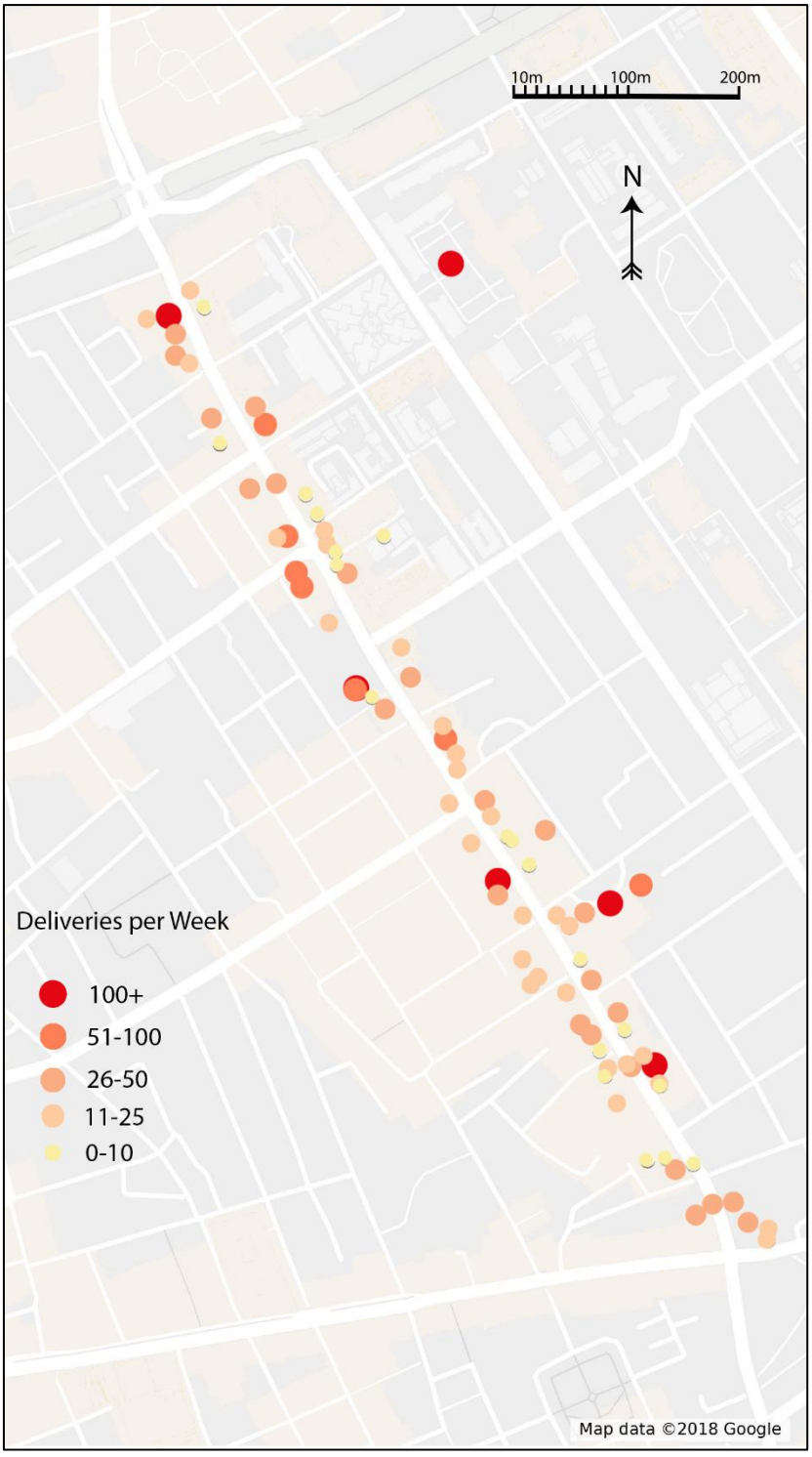
2 Executive Summary

The data presented in this report provides a view into the current delivery/collection activities occurring on TCR on a daily basis. What is apparent is that the majority of the businesses that are located there rely on TCR as the main location for service vehicles to park and that a vast majority of deliveries/collections that take place on the road each week occur within the hours proposed for restrictions.

3 Total Deliveries

The survey indicated that across all the respondents. 7,704 deliveries or collections were made during an average week. The map in figure 1 gives an indication of the locations which receive the most deliveries per week.

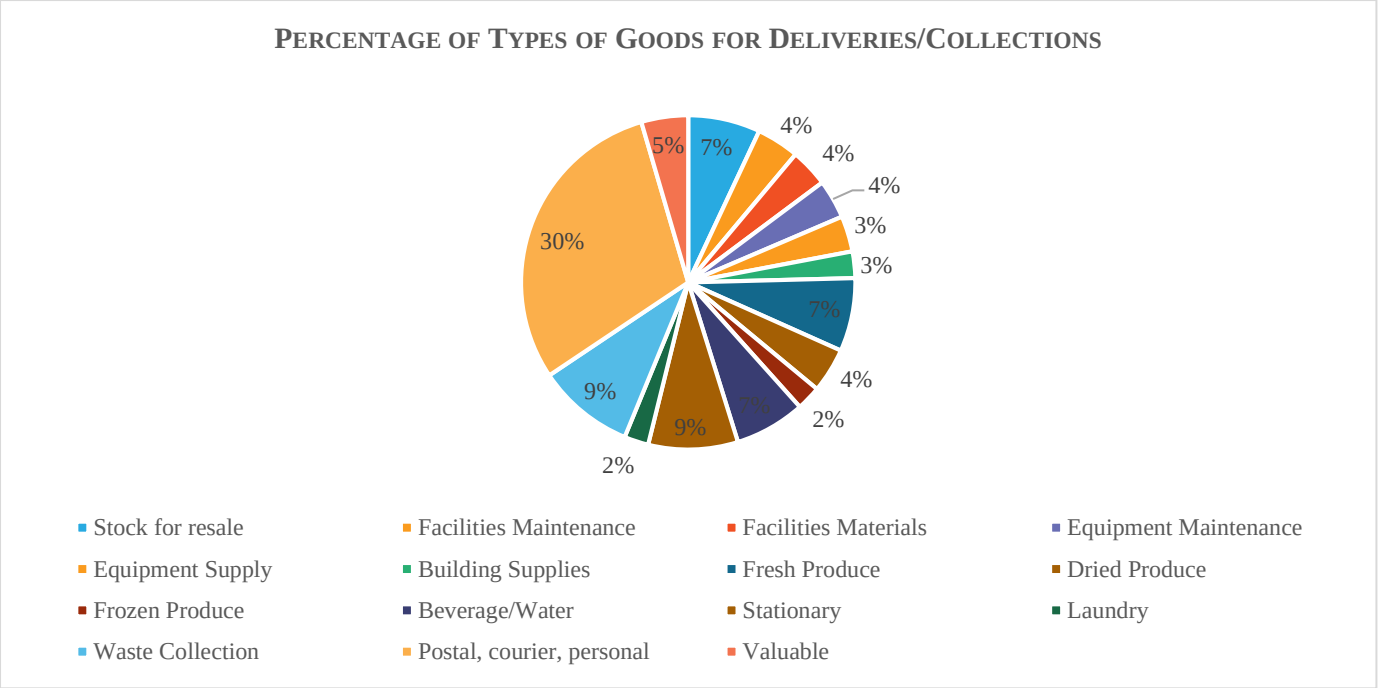
Figure 1: Map of TCR Weekly Deliveries



Of the 7,704 deliveries and collections, made, 30% were postal, courier or personal deliveries, with the next largest proportions being stationary and waste deliveries. This is noteworthy as stationary deliveries in particular are unlikely to be time-sensitive and have the potential to be part of a shared supplier scheme. The prevalence of postal, courier or personal deliveries is also significant as is shows the impact that encouraging staff to have deliveries delivered at home/shared pick-up locations could have on delivery numbers.

It should also be noted that the inclusion of UCL in the data set somewhat skews the data due to its very high number of deliveries (estimated by the responder at 1080 per week) which accounts for more than 20% of the total for TCR.

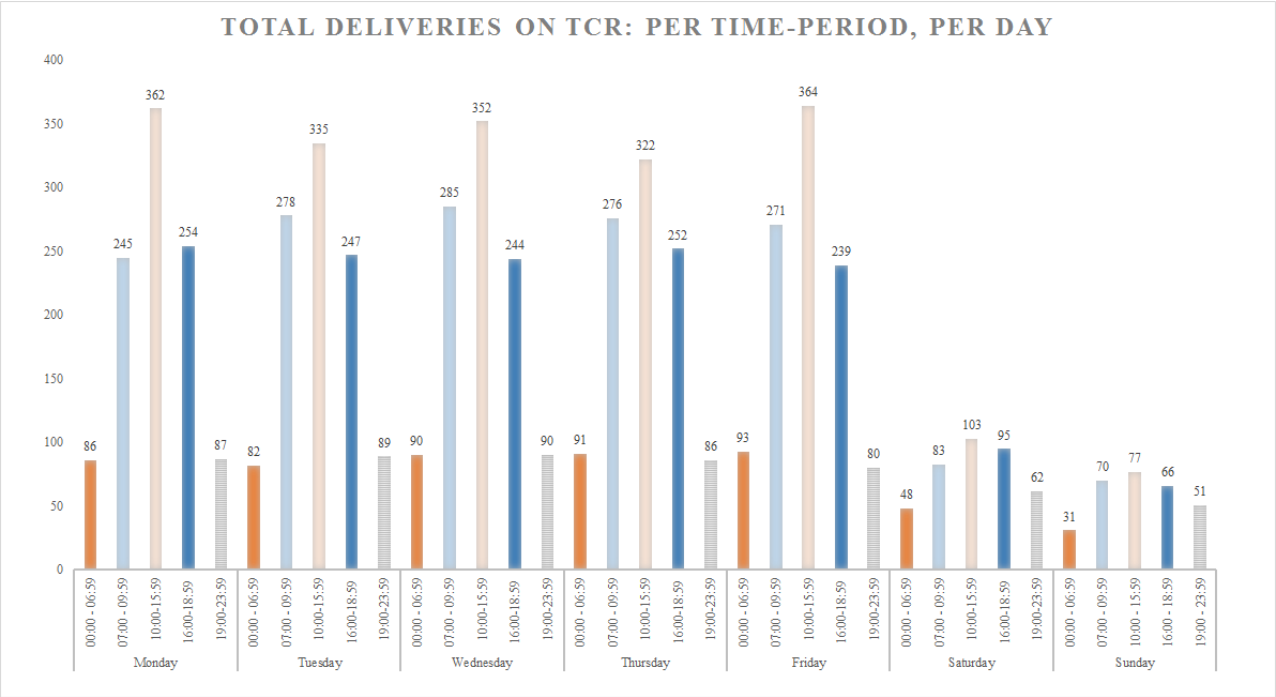
Figure 2: Percentage of Types of Goods for Deliveries/Collections on TCR



4 Peak Time Deliveries

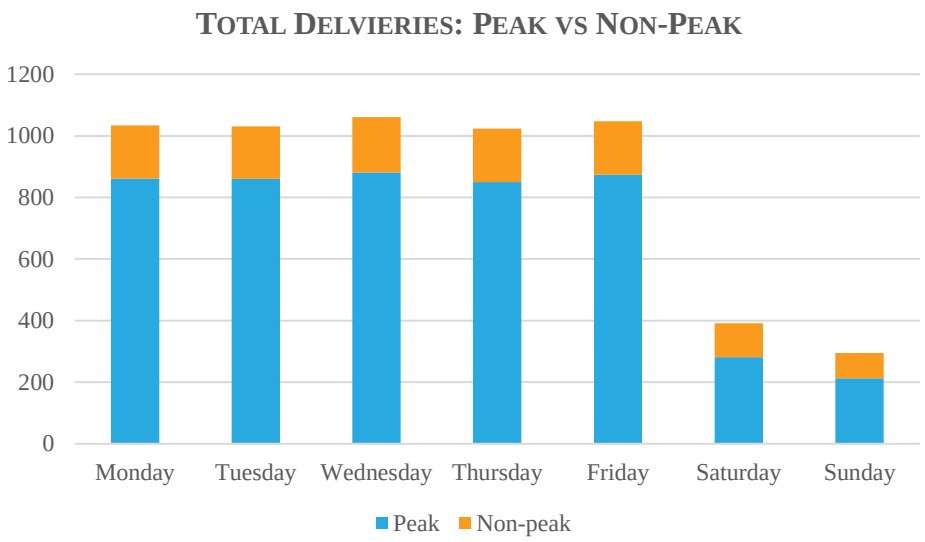
Figure 3, below, shows the distribution by time of all deliveries and collections made on TCR throughout the day for each day of the week. The busiest time of day, every day is perhaps unsurprisingly during the AM peak; between 07:00 and 09:59.

Figure 3: Total Deliveries on TCR at different times on different days



Of the 7,704 deliveries and collections made per week on TCR, a vast majority of these are made during peak hours (between 07:00 and 19:00). This is consistent across all days and implies an opportunity to move some activity to off-peak hours if adequate provision were made.

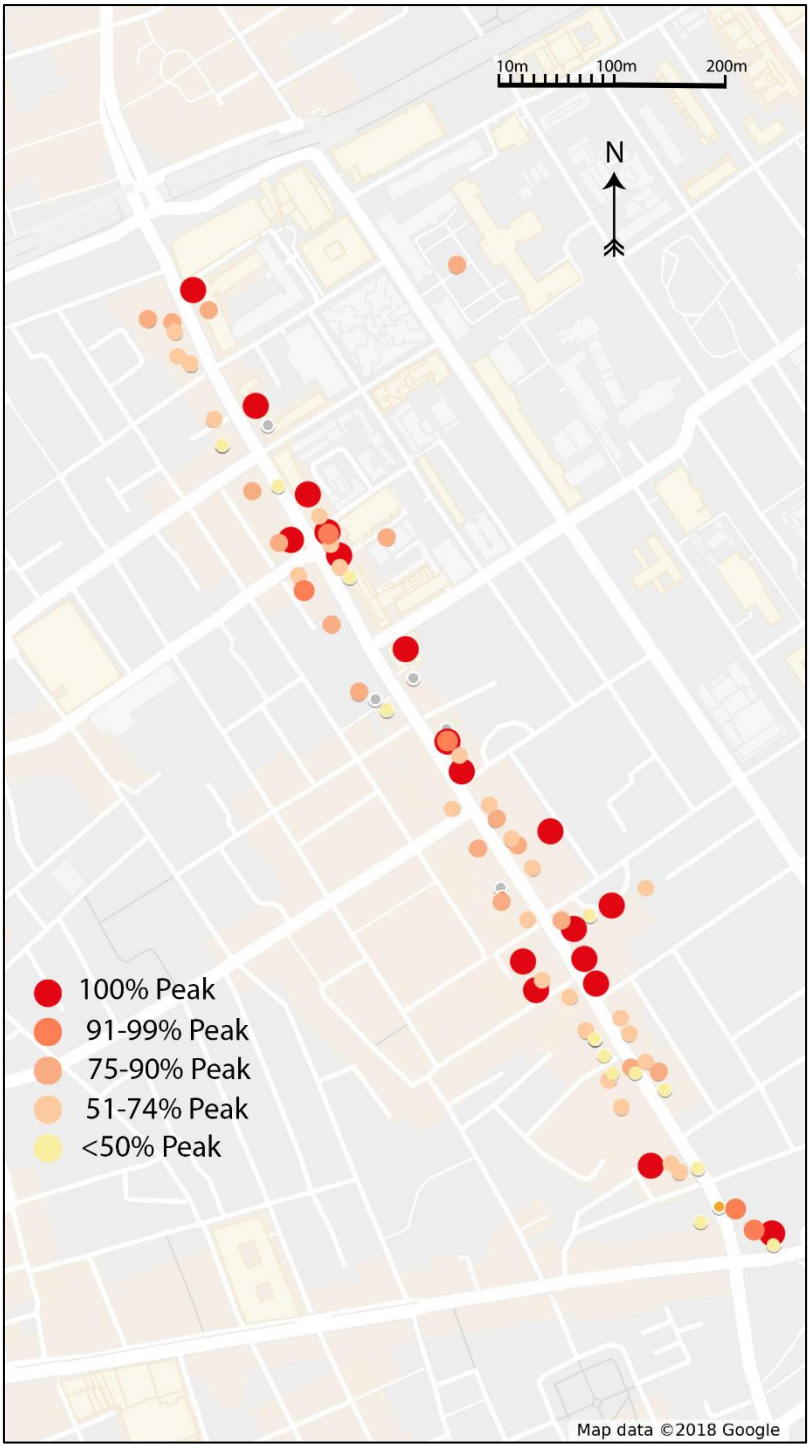
Figure 4: Total Peak and Non-Peak Deliveries on TCR per day



Of the 92 premises that responded, 17 received all of their deliveries/collections during peak hours. A further 25% received more than 90% of their deliveries during peak hours. A number of responders noted that they were only able to accept deliveries "*during office hours*" for staffing reasons. These findings imply that any intervention impacting businesses ability to undertake deliveries/collections within the peak will encounter considerable resistance unless adequate alternative measures are identified/implemented.

Equally, figure 5 (below) illustrates how the geographic spread of businesses receiving deliveries is relatively even. Businesses the length of TCR and on both sides of the carriageway receive a large volume of peak time deliveries. This implies that provision of dedicated loading bays would need to be carefully considered with the possibly surprising finding that the centre of the surveyed zones appears to see the least densely concentrated peak delivery activity.

Figure 5: Map of the percentage of deliveries occurring at Peak-times for each location on TCR



5 Critical Deliveries

Results showed that 59% of the businesses on TCR that responded to the survey receive critical deliveries or collections. It should be noted that the nature of the survey question meant that the responders were left to decide for themselves what constitutes a critical delivery, and so the validity of this number in comparison to the number of deliveries that are actually critical could be questioned.

Sixty one percent indicated that they believed they were in a position to request (or were already requesting) deliveries/collections to occur at specific times of the day. Specific comments made by businesses on this topic include:

- deliveries are made only occurred during opening hours;
- critical deliveries were made within certain, precise time slots;
- For deliveries of their own stock they give vehicles a specific time slot; and
- They could not dictate the delivery time of postal/courier deliveries, especially those that are staff personal deliveries.

Figure 6 shows a map of businesses receiving time critical deliveries. Once again, critical deliveries appear to take place all along the surveyed stretch of TCR.

Figure 6: Map of Businesses receiving time critical deliveries on TCR

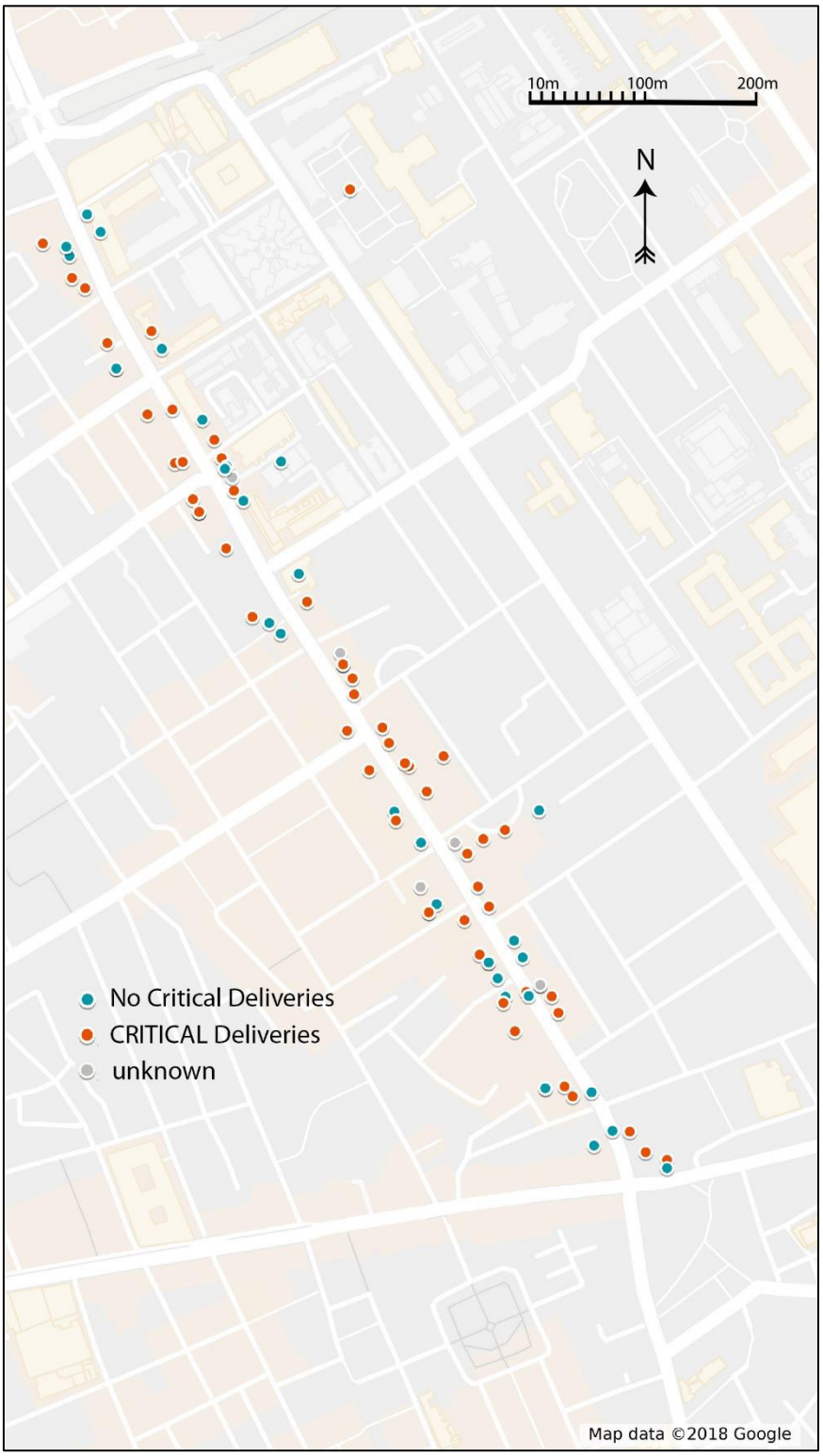
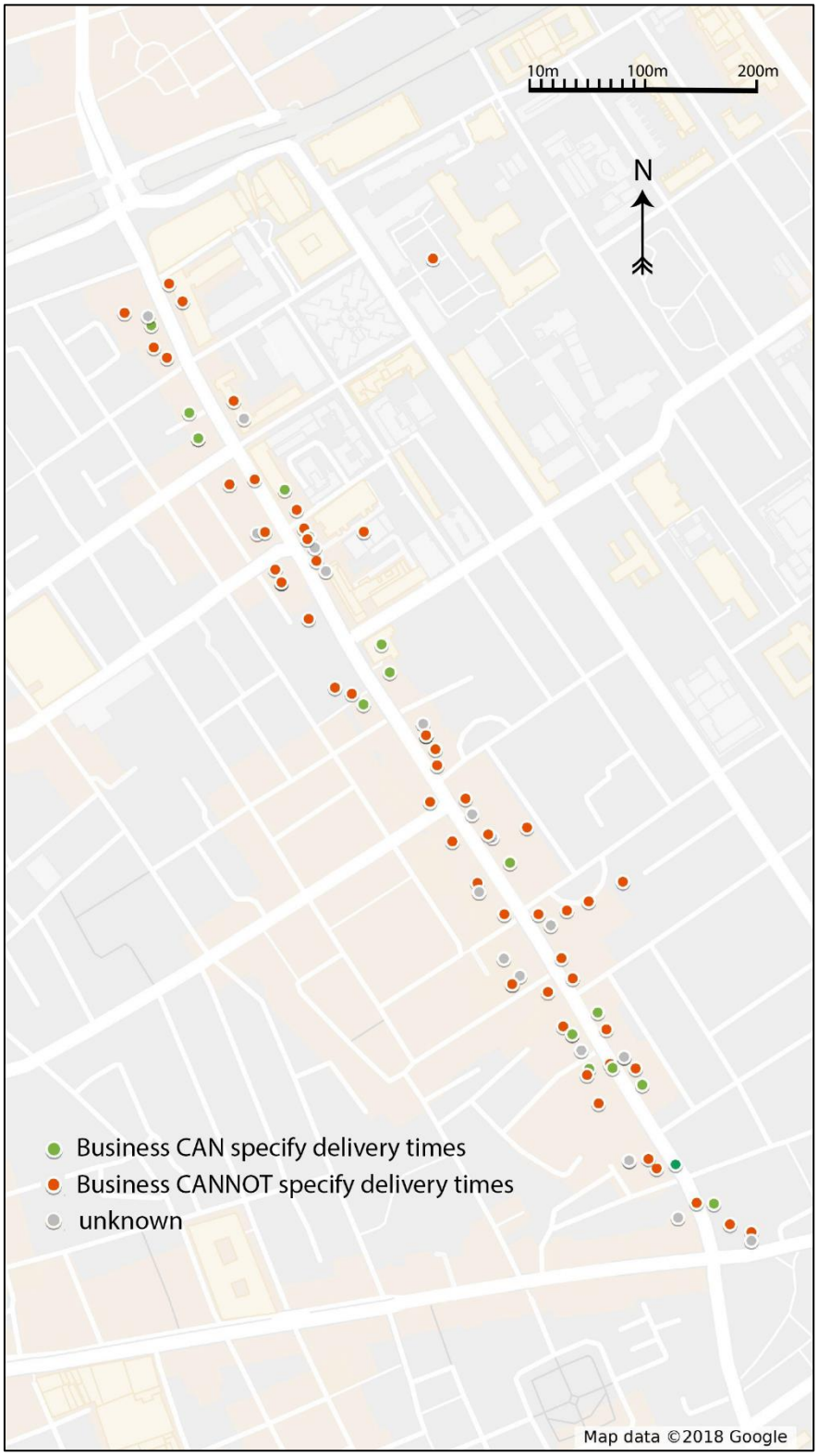


Figure 7 (below) shows which can and cannot specify the time of their deliveries. Once more, there are no discernible distribution patterns when these responses are viewed geographically.

Figure 7: Map of Businesses which can specify delivery time on TCR



6 Waste Collection

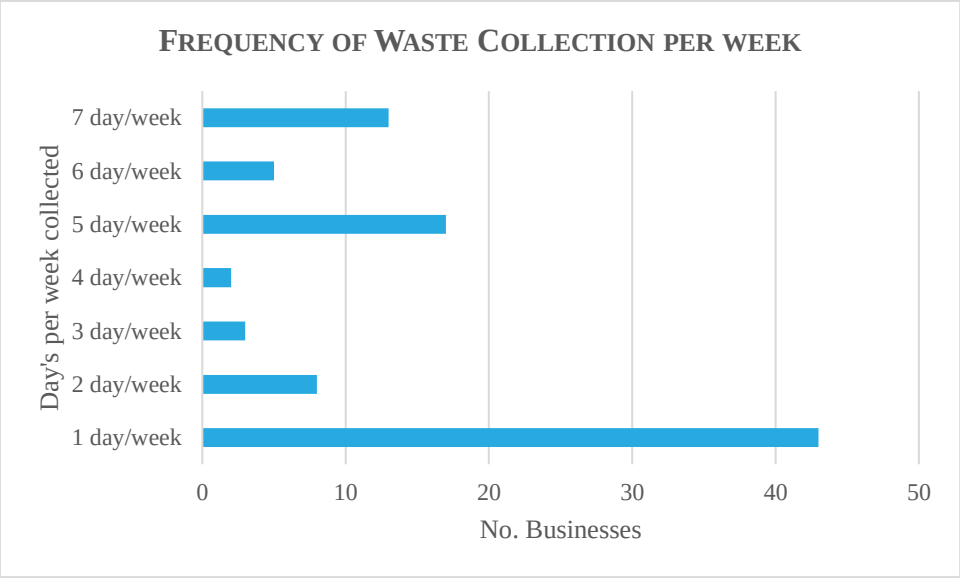
There are 14 different waste contractors used by the businesses that responded to the survey. Five of the businesses that responded use multiple contractors to collect their waste. It is not clear why this may be.

Thirty three locations use Camden Council as their waste operator (36% of respondents) but on the average day, only 18% of waste vehicle movements on TCR involve a Camden Council Waste Vehicle.

Across all businesses that responded there were a total of 255 individual waste collections per week, and though the largest proportion stated that their waste was collected once a week, a majority had it collected on multiple days.

This means an average of 4 different business getting their waste collected each day during the week, and 18 different businesses on average on both Saturday and Sunday.

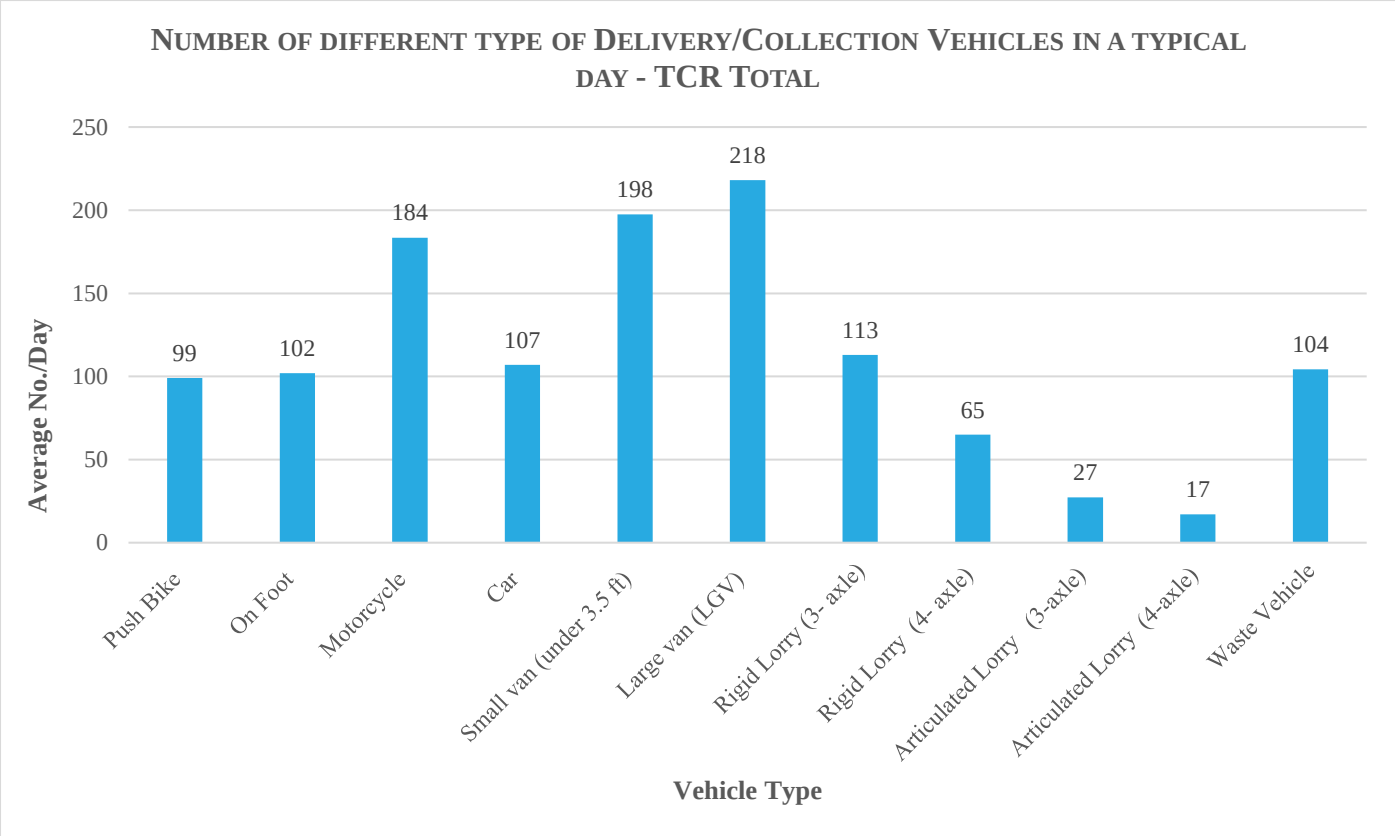
Figure 8: Frequency of Waste collection per week for TCR Businesses



7 Types of Vehicles

The graph in figure 9 shows the quantity of selected vehicle types employed to undertake goods deliveries/collection on TCR on a typical day. The most commonly used vehicle is a large van. Relatively few articulated vehicles are employed. Whilst this figure also provides an indication of the number of delivery vehicles that use TCR each day, it does not take into account any natural consolidation that may occur where businesses share suppliers.

Figure 9: The number of each different type of delivery vehicle on TCR per day



8 Loading Bays

Fifty-four percent of survey responders indicated that their delivery vehicles currently park on TCR with 66% stating that they have no access to an off street loading bay. A map of which businesses do have access to an off-street laoding bay is shown in figure 10 and a map of which currently have delivery vehicles park on the street is shown in figure 11. The distribution of residents with and without access to off street loading and unloading faciltiies is broadly consistent. If collaboration between residents were possible an option that may bear further scrutiny is the viability of shared use of off-street facilities by TCR residents.

Figure 10: Map of Businesses with Off-Street Loading Bays

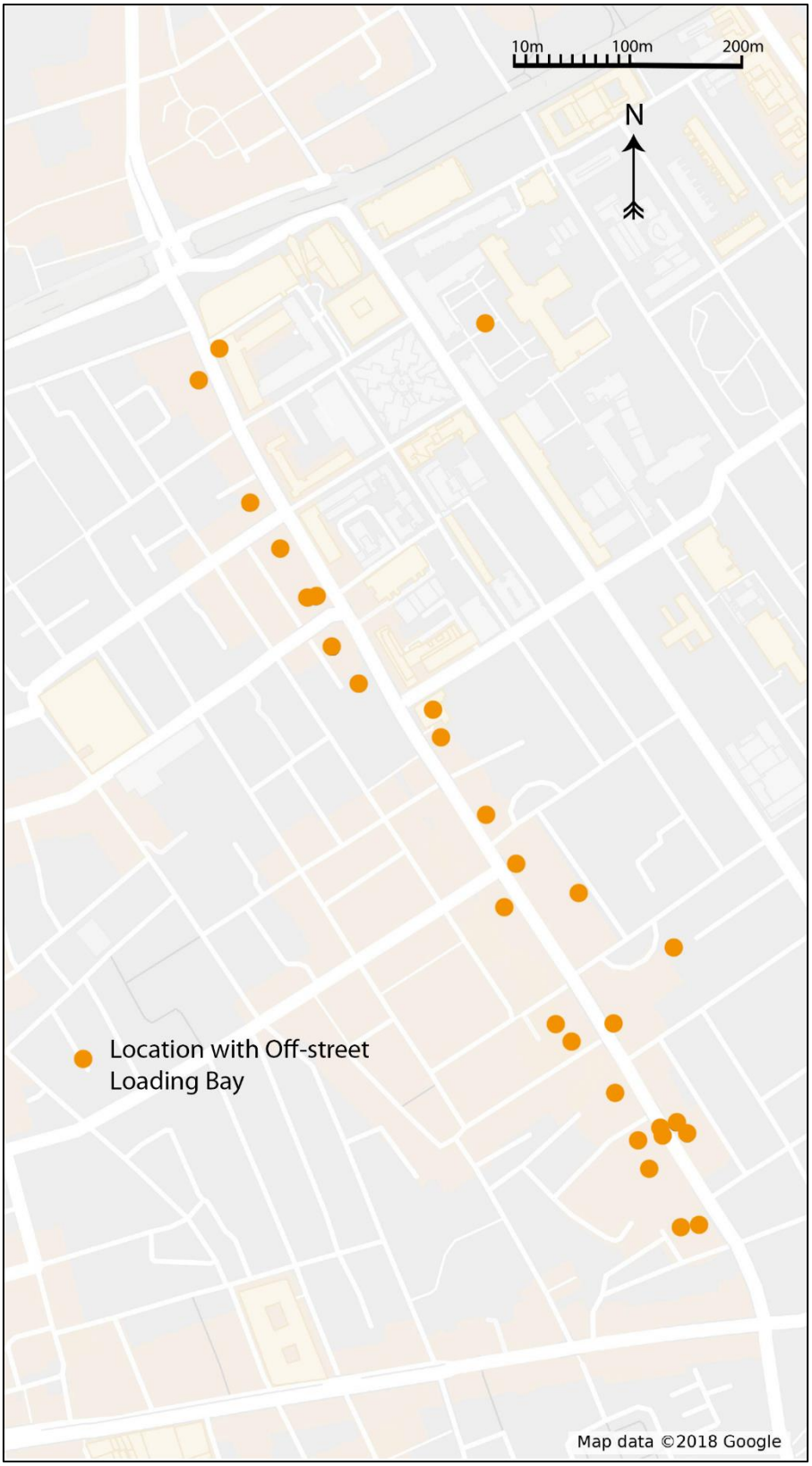
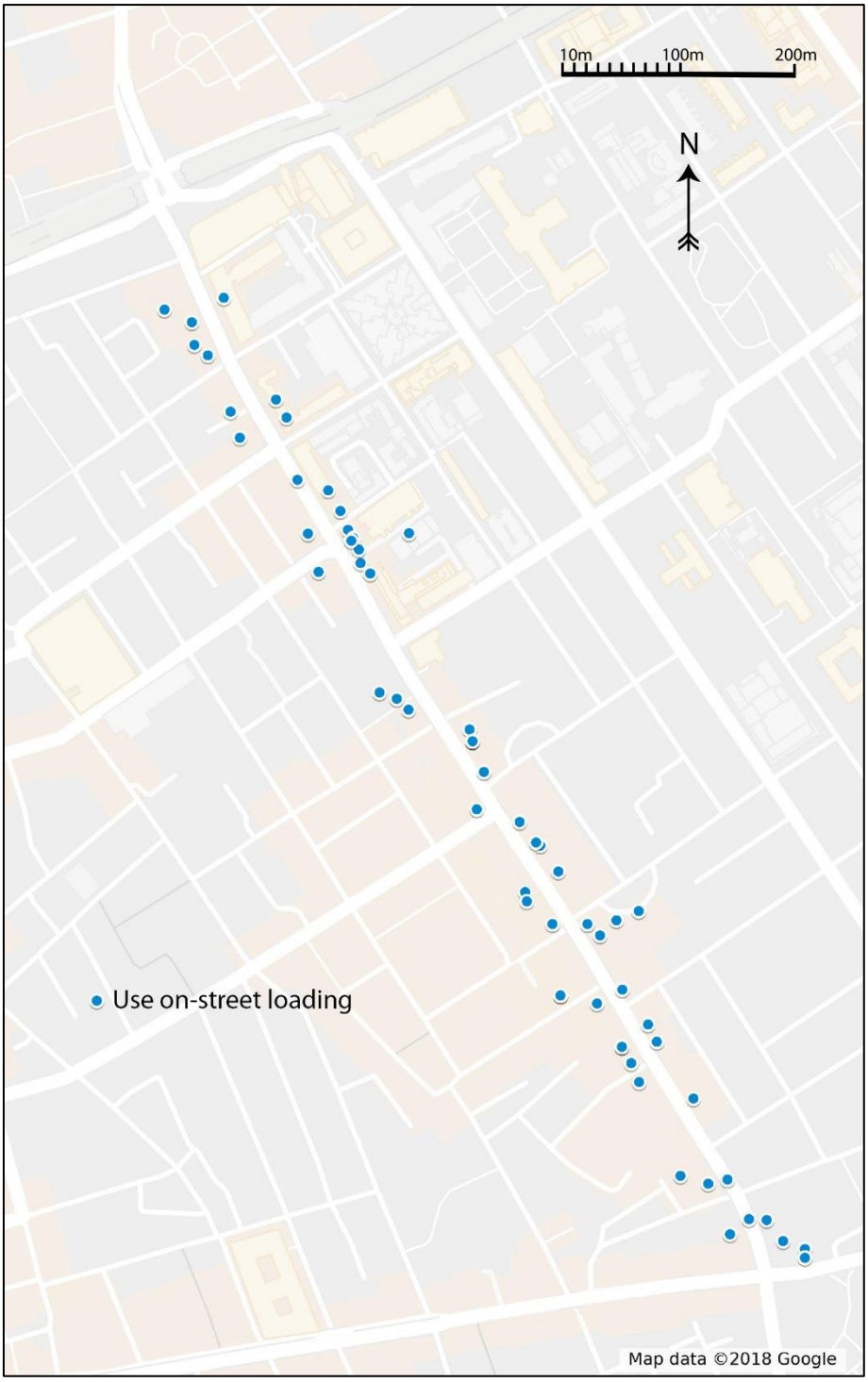


Figure 11: Map of Businesses reliant upon on-street delivery activity



9 Recommendations to help 'shape change'

- A large amount of engagement and collaboration with Tottenham Court Road residents will be required in order to enact the planned restrictions for cars, taxis and lorries on Monday – Saturday between 8am – 7pm due to the huge proportion of deliveries/collections that are currently made at these times.
- Work will need to be undertaken to understand perceptions of what constitutes a 'critical delivery' and to better understand what the residents currently consider to fit within this definition. This will

help to increase utilisation of delivery booking systems by reducing spontaneous deliveries of 'critical' goods, and help move residents away from the idea that all deliveries need to be delivered at peak times.

- The current lack of alternative options to parking on TCR for delivery vehicles will inhibit the scheme unless alternative parking locations (either in shared off-street loading bays, or on side roads) are made available and are suitably convenient for businesses.

  It is striking that two thirds of respondents state that they have no access to off-street. Provision of managed on or off-street loading facilities could be a relatively simple way of more efficiently coordinating delivery activity on TCR. Alternatively it may be possible to create some form of 'buddy' system where residents agree to share existing loading facilities. This would be an innovative approach that would require a degree of further study, engagement and collaboration but could be effective in this location where residents with and without off street loading/unloading facilities are reasonably evenly distributed. This would also create a good model for other BIDs to emulate.

- It should be noted that there is a currently a dramatic contrast in the number of deliveries made on Sunday compared to other days of the week. Responses imply that this is due to it being outside of office hours for many of the residents, but since this will be the only day where deliveries could be delivered between 8am-7pm under the proposed scheme, there should a focus on encouraging all residents are capable of accepting deliveries on Sunday to schedule deliveries at this time.

- Explore consolidation options to help reduce the number of vehicles – this could be virtual consolidation by encouraging residents to use a single shared supplier for goods such as stationary, or physical consolidation through an offsite consolidation centre for TCR residents. Depending upon location, a physical centre may also become an option for provision of off-street loading/unloading facilities for all TCR residents

- Encourage businesses to restrict personal deliveries to their premises. As these type of deliveries form the largest proportion of those made on a weekly basis, reducing the number of personal deliveries could have a significant impact on overall delivery vehicle numbers. Furthermore, it is impossible for businesses to dictate the delivery times for goods ordered by their employees. Restricting this activity via, for example, changes to company policy and better provision of information on alternative options would aid businesses in scheduling deliveries outside of peak hours.