Public survey of residents in the Seven Sisters area about potential redevelopment of the Wards Corner site

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CIPR PARTNER

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Methodology

ComRes interviewed 577 adults in the Seven Sisters area of Tottenham, using a face-to-face, door-to-door interview methodology between 10th and 18th April 2012. The area was determined as houses with postcodes that begin with N15 4, N15 5 and N15 6.

Quotas were set to ensure at least 150 residents from each of these three areas were interviewed, as well as representative quotas for gender and age group within each postcode area. Further to this, ComRes used a spread of interview shifts in the daytime, evening and at the weekend in order to achieve a good spread of people. Finally, data were weighted to be demographically representative of Haringey borough adults by age group and gender, as well as to 33% for each of the three postcode regions.

ComRes is a member of the British Polling Council and abides by its rules (www.britishpollingcouncil.org). This commits us to the highest standards of transparency.

The BPC's rules state that all data and research findings made on the basis of surveys conducted by member organisations that enter the public domain must include reference to the following:

- **The company conducting the research (ComRes)**
- **The client commissioning the survey**
- **Dates of interviewing**
- **Method of obtaining the interviews (e.g. in-person, post, telephone, internet)**
- **The universe effectively represented (all adults, voters etc.)**
- **The percentages upon which conclusions are based**
- **Size of the sample and geographic coverage.**

Published references (such as a press release) should also show a web address where full data tables may be viewed, and they should also show the complete wording of questions upon which any data that has entered the public domain are based.

All press releases or other publications must be checked with ComRes before use. ComRes requires 48 hours to check a press release unless otherwise agreed.

Executive Summary

Seven Sisters is a clear hub for residents of the surrounding area. As well as using it for shopping, a large majority of residents in the area use its transport on a very regular basis.

A majority use shops and services in the area more than once a week and **there are high levels of satisfaction with the number of restaurants and particularly the range of shops in the Seven Sisters area.** However, a more in-depth analysis of satisfaction reveals that there is clear room for improvement – the proportion of residents who say they are *very* satisfied with each of the services is actually quite low.

This is reflected in the priorities of local residents, which indicate that there is a clear appetite for investment and change. Two thirds of residents state that increasing the amount of investment is a priority for the area, while more than half say that increasing the range of shops is a priority.

This demand is reflected in responses regarding preference for the future of the Wards Corner site. While one in five residents say that they want the site to remain as it is, **three quarters would prefer to see a redevelopment, including a mix of national and local shops and restaurants, the flats and an increased amount of publicly available space as well as a new market hall.**

This is clearly a positive response for GL Hearn and Grainger, seeing as it appears to indicate a clear counter-argument to that of opponents who claim to represent the local population. **It would appear to suggest that the campaign in the area so far has been largely conducted by a 'vocal minority' who oppose the proposed development and that there is an until now unheard 'silent majority' who tend to favour the proposal.**

Indeed, responses to this survey indicate that there is more that can be done to increase awareness and favourability around the potential redevelopment. It is notable that while a large majority of people have heard of the potential development, just one in four says that they know a lot about it. In fact, those who say that they do know a lot about it are more likely to say that they want to keep the site as it currently is. **This suggests that at present, opponents of the scheme are communicating their messages more successfully, raising awareness and advocating the retention of current buildings.**

However, the results also show that local residents who have more knowledge about the potential redevelopment are more likely to support it. It is notable that people who would prefer to see the development happen are more likely to know that it would include a new market hall than those who would prefer to keep the current site. Further to this, a quarter of people who originally say that they would prefer to keep the current site change their mind after having seen images of what the new site would look like.

With regards to targeted campaigning, there are also a number of micro-geographical differences that are worthy of consideration. Even among so small an area as that targeted in this survey, it is clear that from one postcode area to another the attitudes and priorities of local residents can vary considerably.

N15 4 residents are more likely than those from the other postcode areas (N15 5 and N15 6), to use the Seven Sisters area, as well as the market specifically, for its shops and services. This may be linked to the higher levels of satisfaction that these residents have with the issues and services in the area that are tested in this survey.

By contrast, N15 5 and N15 6 residents, who are generally more likely to shop in areas other than Seven Sisters tend to place a higher priority on increasing the amount of investment in the area. By increasing investment in Seven Sisters, it may be possible to draw these residents back to the area, in turn possibly leading to further investment as they increase their local spending.

Indeed, the greater favourability among N15 5 and N15 6 residents towards the proposal indicates that the redevelopment has the potential to draw many locals to the area who have traditionally spent their money elsewhere.

Use of services and stations in Seven Sisters area

Q6: How frequently, if at all, do you use each of the following in the Seven Sisters area?

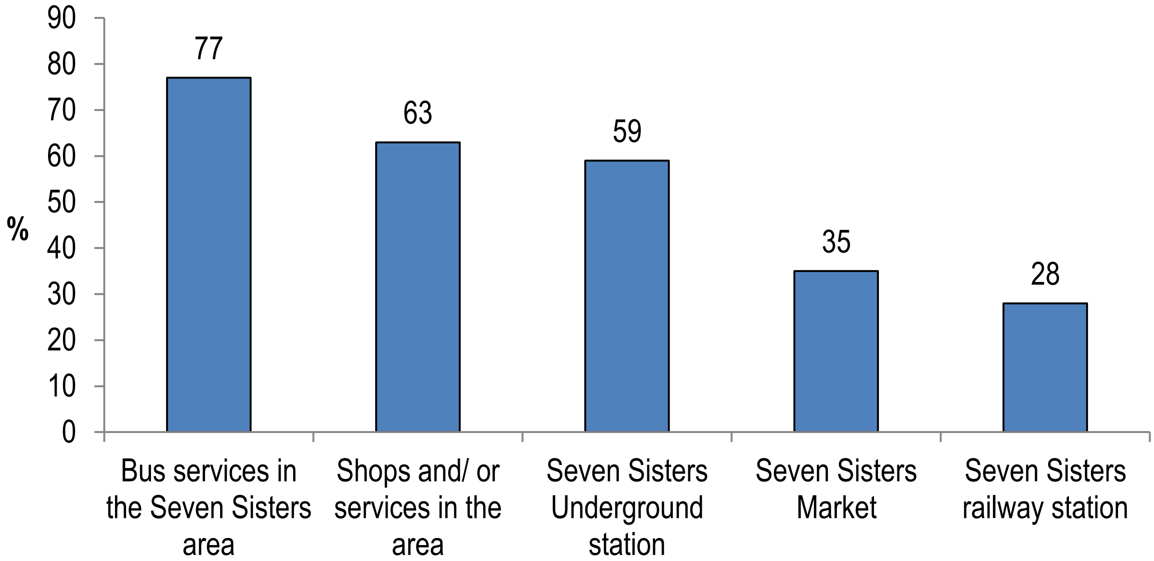


Fig1.1 People who use services more than once a week (almost every day + a few times a week)
Base: All residents

- A majority of residents (63%) use shops and services in the area more than once a week, while one in three (35%) say that they use the Seven Sisters Market this frequently.
  - N15 4 postcode area residents (53%) are almost twice as likely as either N15 5 (25%) or N15 6 postcode area residents (30%) to use Seven Sisters Market more than once a week.
  - N15 4 postcode area residents (69%) are also more likely than N15 5 (59%) or N15 6 postcode area residents (61%) to use shops and/ or services in the Seven Sisters area. This suggests that N15 5 and N15 6 residents are more likely than N15 4 residents to do their shopping in areas other than Seven Sisters.
  - Perhaps unsurprisingly, people who say that they would prefer to keep the current Ward's Corner site than see it developed are more likely than those who would like to see the site developed to use Seven Sisters Market more than once a week.
  - Additionally, people who have moved to the area more recently are also more likely to use Seven Sisters Market – 48% of people who have lived in the area for five years or less use it more than once a week, compared to just 21% of people who have lived there for more than ten years.
  - There is also an age trend, with younger people more likely than older people to currently use Seven Sisters Market. 41% of 18-34 year olds use the market more than once a week, compared to just 26% of people aged 55 or over. This may suggest that the market in its current form is not necessarily as appealing to older members of the community.

- Of the transport links in the Seven Sisters area, people are most likely to use bus services in the area more than once a week (77%) followed by the underground station (59%) and the railway station (28%).
    - People who work (37%) are considerably more likely than those who do not (15%) to say that they use Seven Sisters underground station almost every day. This suggests that there is a significant local population who commute away from the Seven Sisters area to work.
    - Interestingly however, workers are not noticeably more likely than non-workers to use the railway station or local bus services almost every day.
    - There is a trend by age group, with 36% of 18-34 year olds using Seven Sisters underground station almost every day, compared to just 10% of people aged 55 or over. In part, this may reflect levels of employment among these respective age groups, although younger people are more likely than middle-aged people to use the underground service in Seven Sisters.
    - There are clear geographical differences within the area regarding bus usage – around one in four N15 4 residents (27%) use bus services in the Seven Sisters area almost every day, compared to half of N15 5 residents (48%) and three in five N15 6 residents (60%).
- The chart below shows the full extent of the frequency with which people use different services. While people are more likely to use shops or services in the area than the underground more than once a week, they are actually more likely to use the underground (27%) than shops or services (19%) on an almost daily basis.

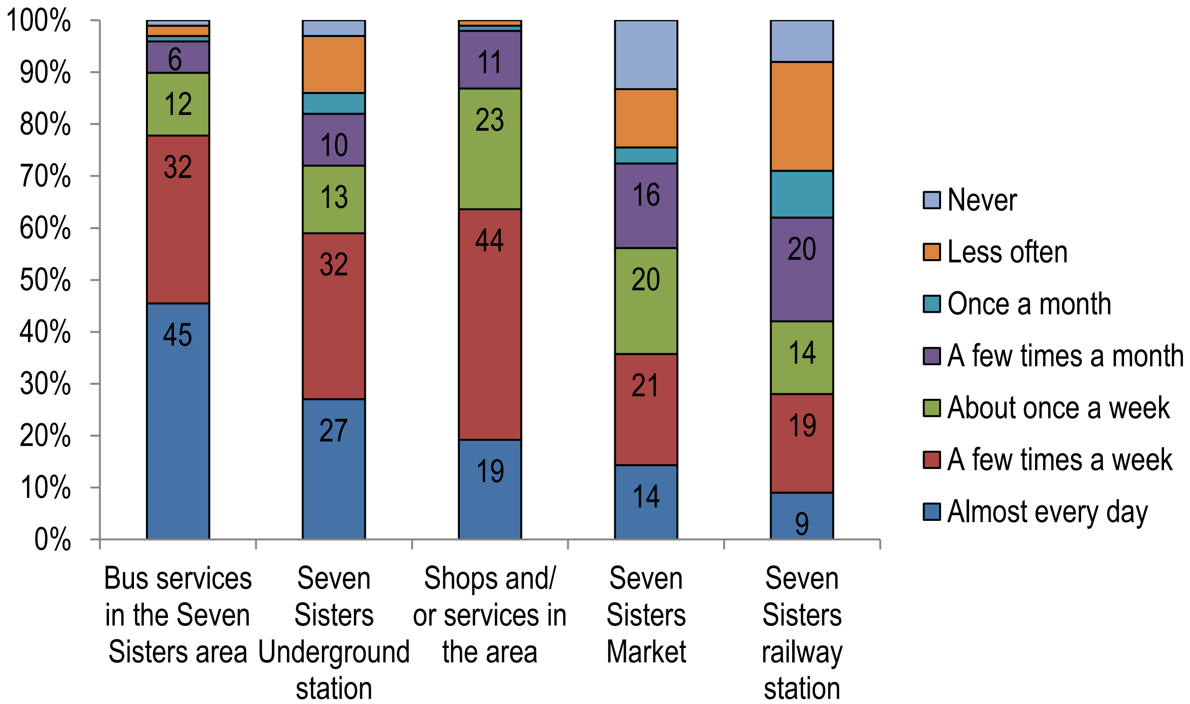


Fig1.2 Frequency with which people use services
Base: All residents

Satisfaction with local issues and services

Q7. How satisfied or dissatisfied are you with each of the following issues or services in the Seven Sisters area?

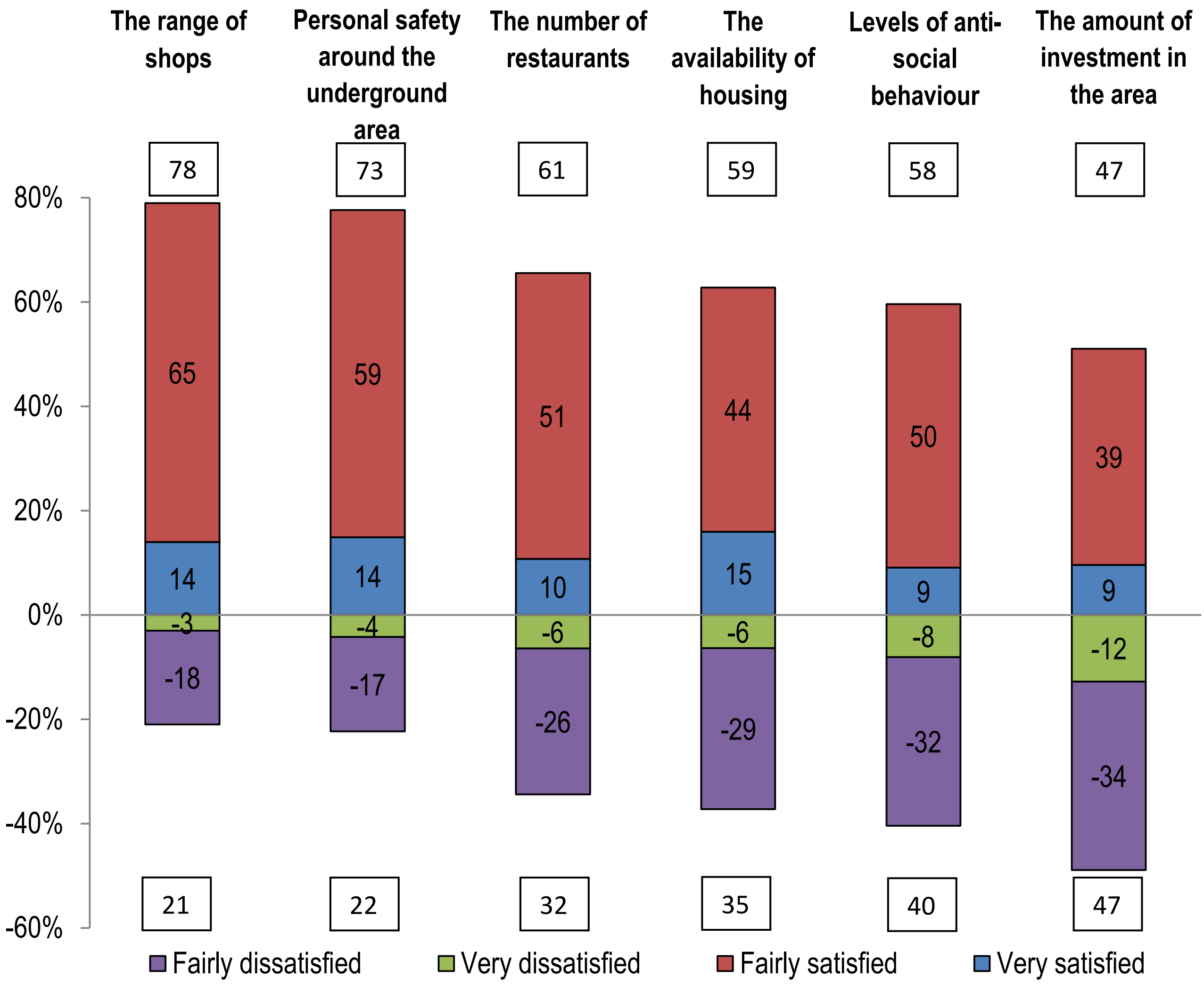


Fig2.1 Satisfaction with issues and services
Base: All residents

- Generally, there is satisfaction with most of the issues and services tested in the Seven Sisters area. More than three quarters of people are satisfied with the range of shops (78%), followed by their personal safety around the underground station area (73%), the number of restaurants (61%), the availability of housing (59%) and levels of anti-social behaviour (58%).
    - It is worth noting however, that while overall satisfaction is generally high, a breakdown of this shows that there is clear room for improvement. Indeed, while 78% say that they are satisfied with the range of shops, just 14% are very satisfied.
- People are least likely to be satisfied (47%) with the amount of investment in the area – in fact, people are just as likely to say that they are dissatisfied (47%) in this regard.

- There are some clear divergences in satisfaction, with N15 4 residents significantly more satisfied than those from other postcode areas. Perhaps most strikingly, just 33% of N15 5 residents are satisfied with levels of anti-social behaviour in the Seven Sisters area, compared to 71% of those from both other postcode areas. Meanwhile, just 29% of N15 5 residents are satisfied with the amount of investment in the area.
- In part, these micro-regional differences may be indicative of the perception of Haringey as one of the most unequal boroughs in London. This suggests that even within an area as small as Seven Sisters, it may be advisable to have a flexible approach to campaigning to seek to meet the full range of local concerns.
    - These approaches are explored in more detail in the following question.

- There is also a general trend by time lived in the area – the longer that people have lived in the area, the less likely they are to be satisfied with the availability of housing, the level of anti-social behaviour, the amount of investment and the number of restaurants.

Priorities for the Seven Sisters area

Q8: Looking at this list, which, if any, are the top three most important for the Seven Sisters area? Please choose up to three, where 1 is the most important, 2 is the second most important, and 3 is the third most important.

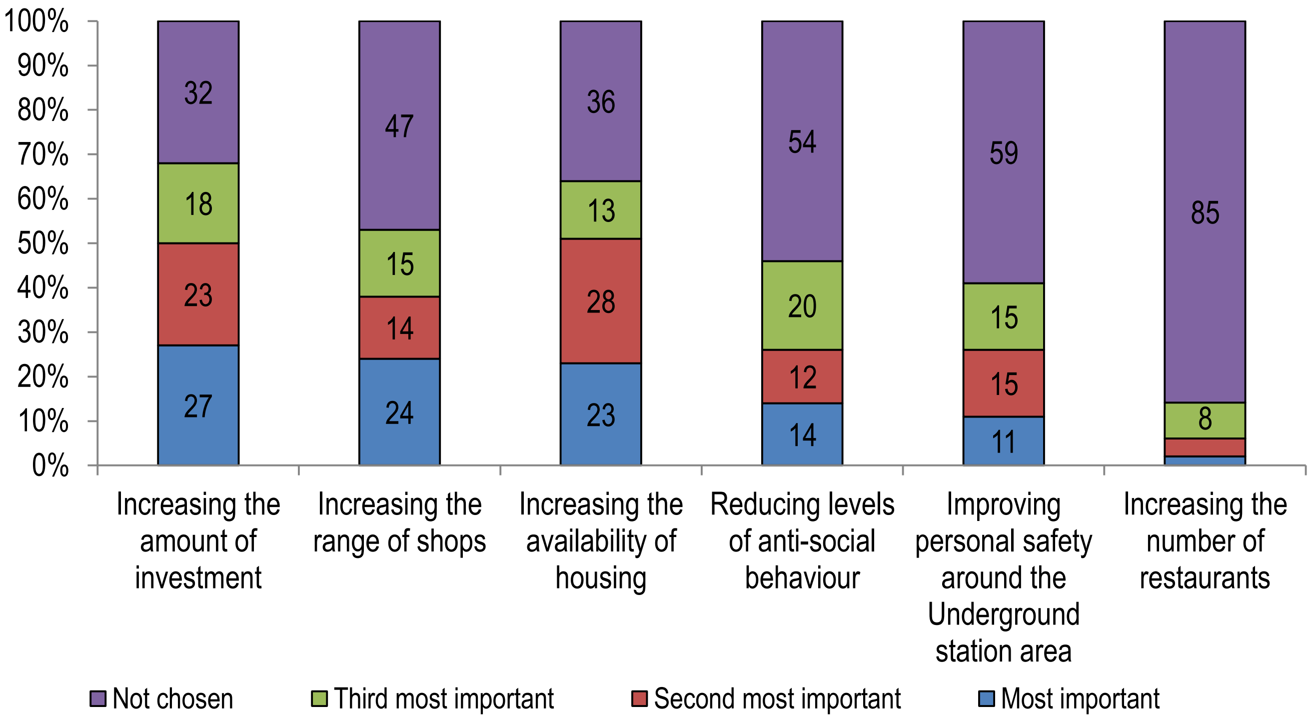


Fig 3.1 People's first, second and third priorities for the Seven Sisters area
Base: All residents

- Seven Sisters residents are most likely to say that increasing the amount of investment in the area (68%) is one of their top three priorities from the list given. Apart from this, increasing the availability of housing (64%) and increasing the range of shops (53%) are seen as a priority by more than half of residents.
  - In part, this reflects the fact that while people are generally satisfied with these services, they are not *very* satisfied, and as such, there is clear demand for improvement.
- Reducing levels of anti-social behaviour (46%) and improving personal safety around the Underground station area (41%) are priorities for fewer residents, while just one in seven people (15%) say that increasing the number of restaurants in the area should be one of the top three priorities for the area.
- As in the previous question, there are clear micro-regional differences.

- N15 4 residents are considerably more likely than those elsewhere to say that increasing the range of shops (54%) or the availability of housing (62%) is either the most or second most important priority for the Seven Sisters area, from the list given.
  - This may well be linked to the fact that, as responses to Q6 show, N15 4 residents are considerably more likely than residents from the other postcode areas to shop more than once a week in the Seven Sisters area.
- N15 6 (60%) and N15 5 (59%) residents, meanwhile, are most likely to say that increasing the amount of investment in the area is either the most or the second most important priority for the area, compared with just 31% of N15 4 residents.
- Furthermore, 44% of N15 5 residents say that reducing levels of anti-social behaviour is the most or second most important priority for the list given, compared with 22% of N15 6 residents and just 13% of N15 4 residents. Again, this reinforces the point that a tailored, localised approach to campaigning may be more effective when seeking to assuage concerns and increase favourability towards the development, even within a relatively small area.

Familiarity with potential redevelopment

Q9: How familiar, or otherwise, are you with the potential redevelopment of the Wards Corner site above Seven Sisters Tube Station?

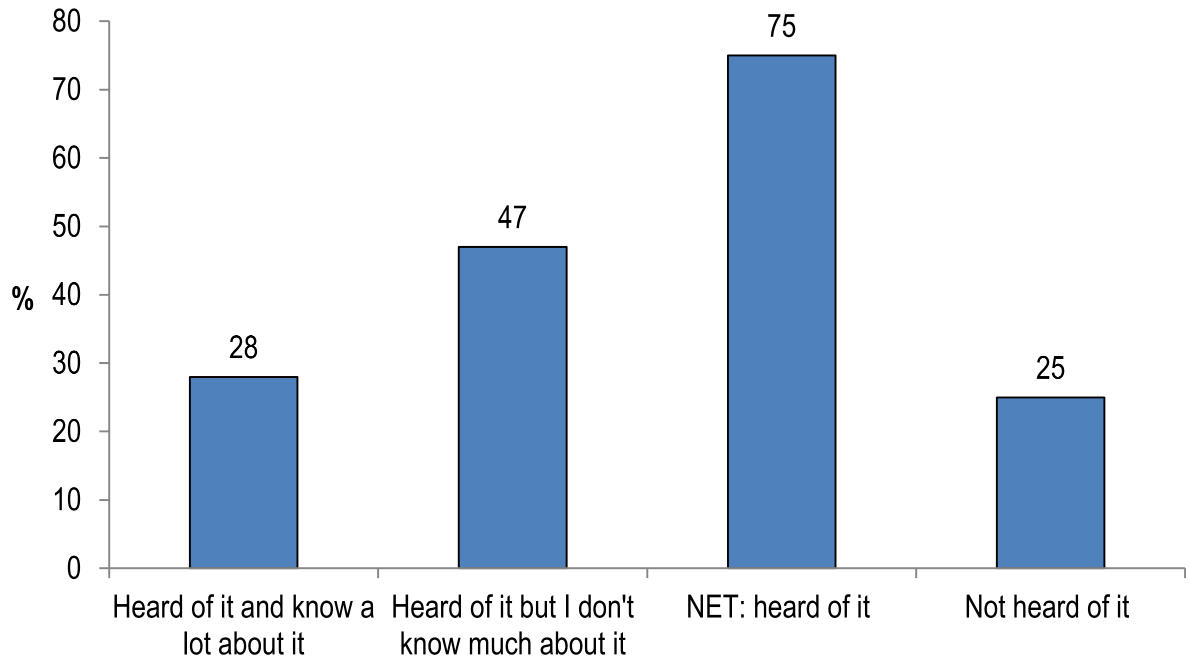


Fig4.1 Familiarity with potential redevelopment
Base: All residents

- Overall, three quarters of residents (75%) say that they have heard of the potential redevelopment of the Wards Corner site above Seven Sisters Tube Station, compared to just one in four who have not heard of it at all (25%). However, just over a quarter (28%) say that they know a lot about it, compared with almost half (47%) who say that they don't know much about it.
    - N15 4 residents are both more likely than those from other postcode areas to have heard of the potential redevelopment (86%) and to know a lot about it (43%).
    - There is a trend by age group, with older people more likely than younger people to know a lot about the potential redevelopment – 35% of people aged 55 and over know a lot about it, compared to just 20% of those aged 18-34.
- 36% of people who want to keep the site as it currently is, know a lot about the potential redevelopment, compared to 27% of those who prefer the new development. This may give an indication that the campaign to keep the current site as it is has had relatively more success in relaying their messages to local residents.

Preference for Wards Corner site

Q10: A company has been seeking permission to regenerate the Wards Corner area above Seven Sisters Tube Station by providing a mix of new space for high street shops, new shops for local independent businesses, a new space for Seven Sisters Market, new restaurants, around 200 new flats above and an increased amount of space accessible to the public on the High Road. [Respondents are shown images of current site – see appendix 2] **With this in mind, which of the following would you prefer to see on the site at Wards Corner, or would you prefer something else?**

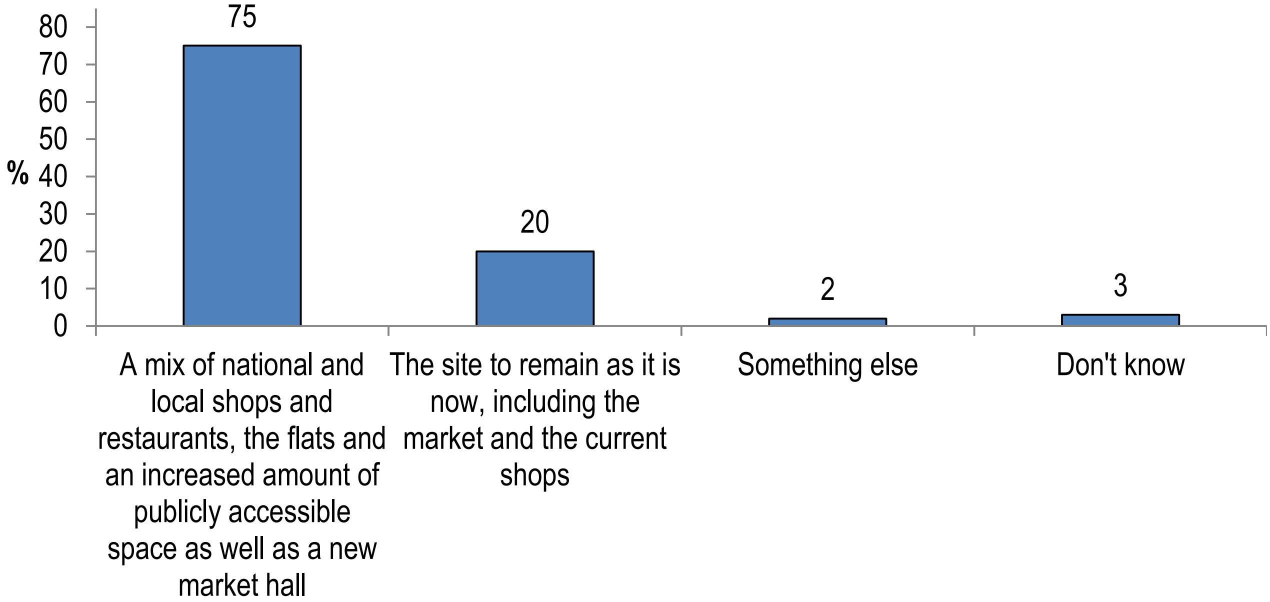


Fig5.1 Preference for Wards Corner site
Base: All residents

- Three quarters of residents say that they would prefer to see a mix of national and local shops and restaurants, flats and an increased amount of publicly accessible space as well as a new market hall (75%), compared with just one in five (20%) who say that they want the site to remain as it is now, including the market and the current shops. Just 2% say that they would prefer to see something else.
    - Residents who have lived in the area for more than 10 years (80%) are more likely than those who haven't been living in the area for as long (72%) to say that they would prefer to see the new development. This is worth noting as one of the main arguments for keeping the current site is to preserve it as a part of the local heritage. That it is residents who have lived in the area longest that most want to see the new development suggests that this argument does not hold sway with those who are most likely to know about local heritage.
    - N15 5 (81%) and N15 6 (82%) residents are more likely than N15 4 residents (63%) to say that they prefer the potential redevelopment.
        - It is worth noting that residents from both of these postcode areas are not particularly likely to use both the shops and the market itself in the Seven

Sisters area at present. That they have an overwhelming preference for the redevelopment indicates that it could be a way of drawing their spending power to the Seven Sisters area, potentially leading to further investment in the local area.

Awareness of market hall in potential redevelopment

Q11: Before today, were you aware, or not, that the proposals for a potential new development of the site included a new market hall for Seven Sisters Market?

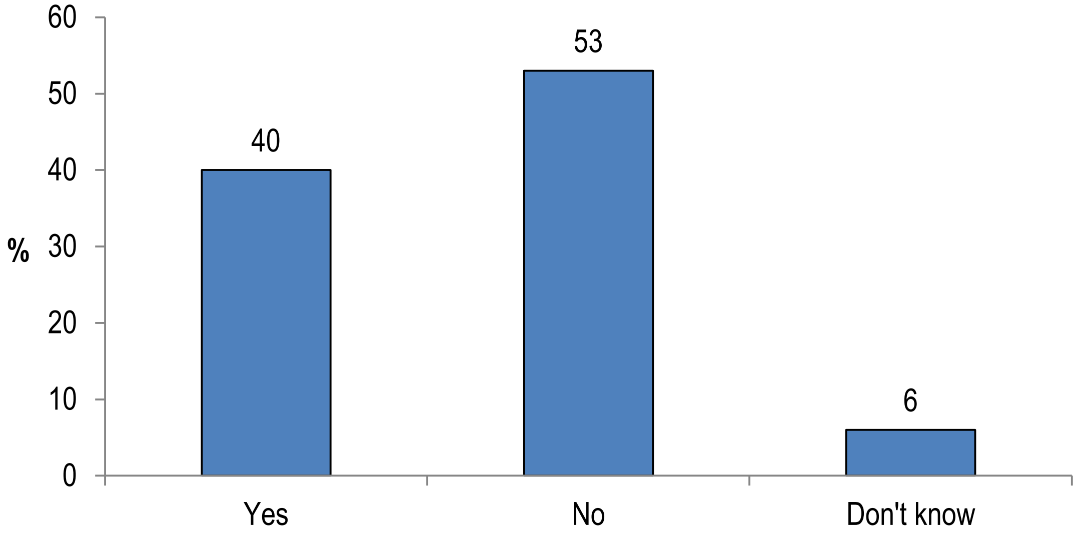


Fig6.1 Awareness of market hall in potential redevelopment
Base: All residents

- Before being surveyed, more than half of residents (53%) were not aware that the proposals for a potential new development of the site included a new market hall for Seven Sister Market, compared to two fifths (40%) who had been aware beforehand.
  - 45% of people who would prefer to see the potential redevelopment knew that it included a new market hall, compared to just 29% of those who prefer the current site. This might suggest that if people do know about the inclusion of a new market hall in the proposal, they are more likely to support it.

Preference for the future of the buildings on the site

Q12: Which of the following best describes your view of what should happen to the buildings on the site?

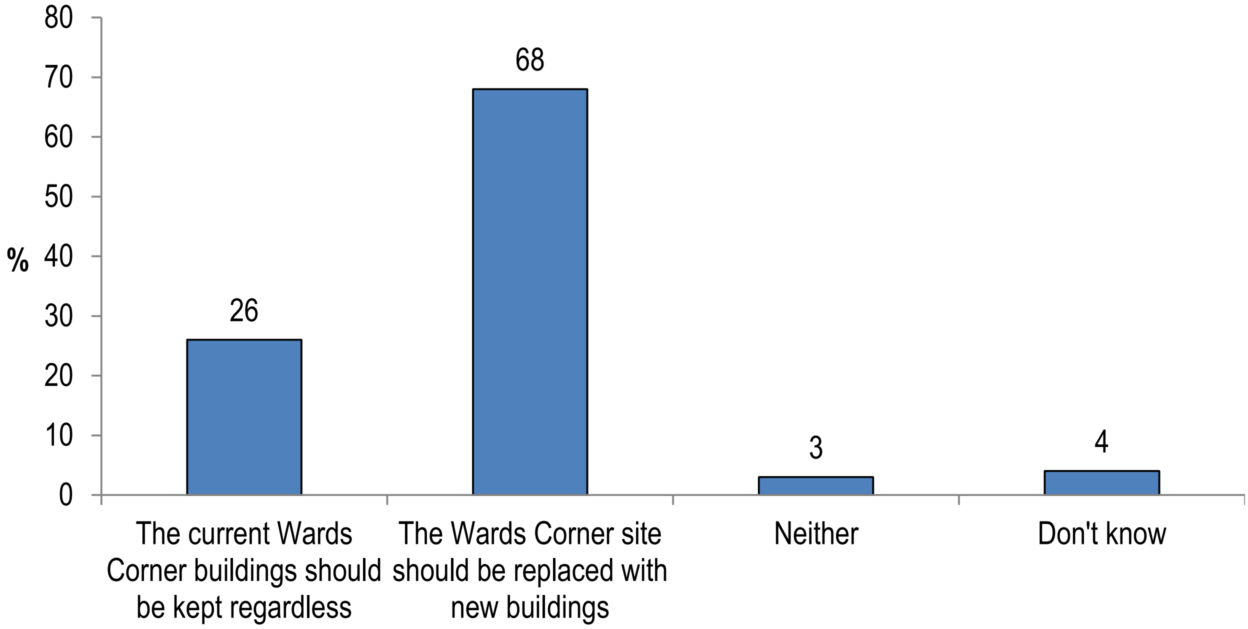


Fig7.1 Preference for the future of the buildings on the site
Base: All residents

- Two thirds of local residents (68%) say that the Wards Corner site should be replaced with new buildings, compared with a quarter of residents (26%) who say that the current Wards Corner buildings should be kept regardless.
    - Residents living in the N15 5 postcode area (77%) – the postcode area in which the Wards Corner site is located – are more likely than those from other postcode areas to think that the buildings on the site should be replaced with new buildings.

Preference for Wards Corner site after seeing design images

Q13: This is a computer generated image of the scheme as proposed in 2010. [Respondents are shown images of current site – see appendix 3] **Now that you've seen this image, I'm going to ask you a few more questions. With this in mind, which of the following would you prefer to see on the site at Wards Corner, or would you prefer something else?**

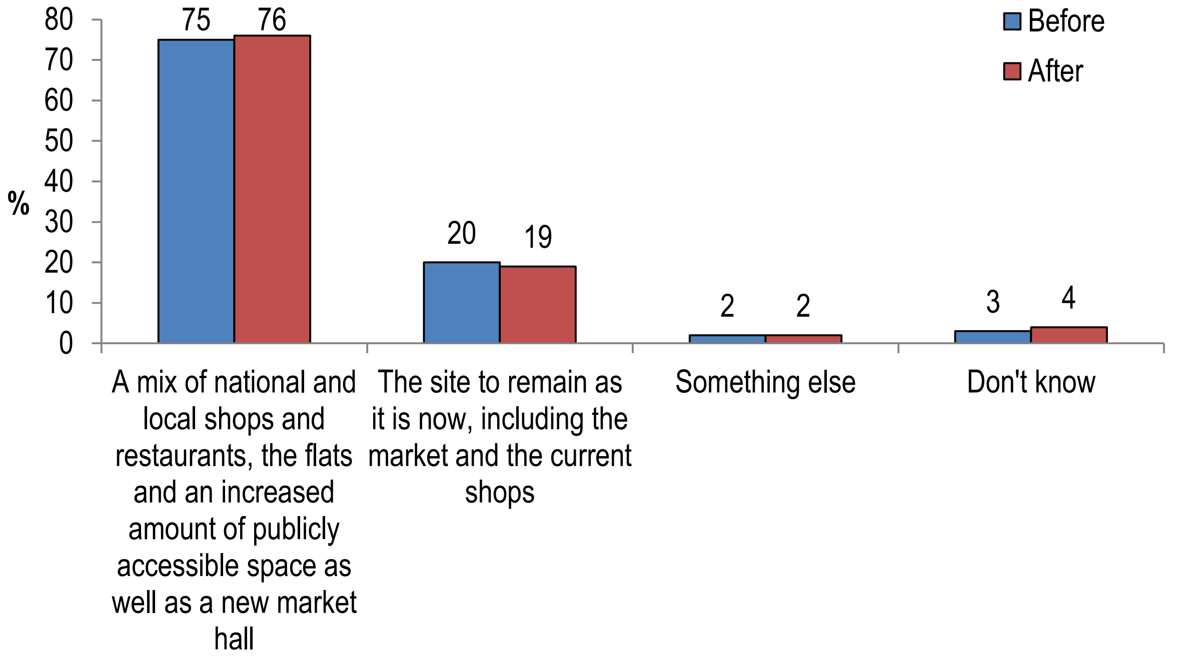


Fig8.1 Preference for Wards Corner site before and after seeing images
Base: All residents

- Whereas 75% say that they prefer the potential redevelopment before seeing the images, 76% say that they prefer the potential redevelopment afterwards. On the surface therefore, it does not appear that showing local residents computer generated images of the proposed scheme has any significant effect on public favourability.
    - However, 23% of those who said that they preferred the current site at Q10 now prefer the potential redevelopment at Q13, after having seen the picture. By contrast, just 5% who said that they preferred the potential redevelopment at Q10 then say that they would prefer to see the site remain as it is at Q13, after having seen the picture.[1]

[1] This may seem surprising, given how little effect there is on the overall favourability figures between the two questions. But this can be explained by the comparative sample sizes – the original number of people who said that they preferred the current site at Q10 is quite small, and as such, a reasonably large swing in preference of 23% does not make a particularly big impression on the overall figure.

Preference for the future of the buildings on the site after seeing design images

Q14: Which of the following best describes your view of what should happen to the buildings on the site?

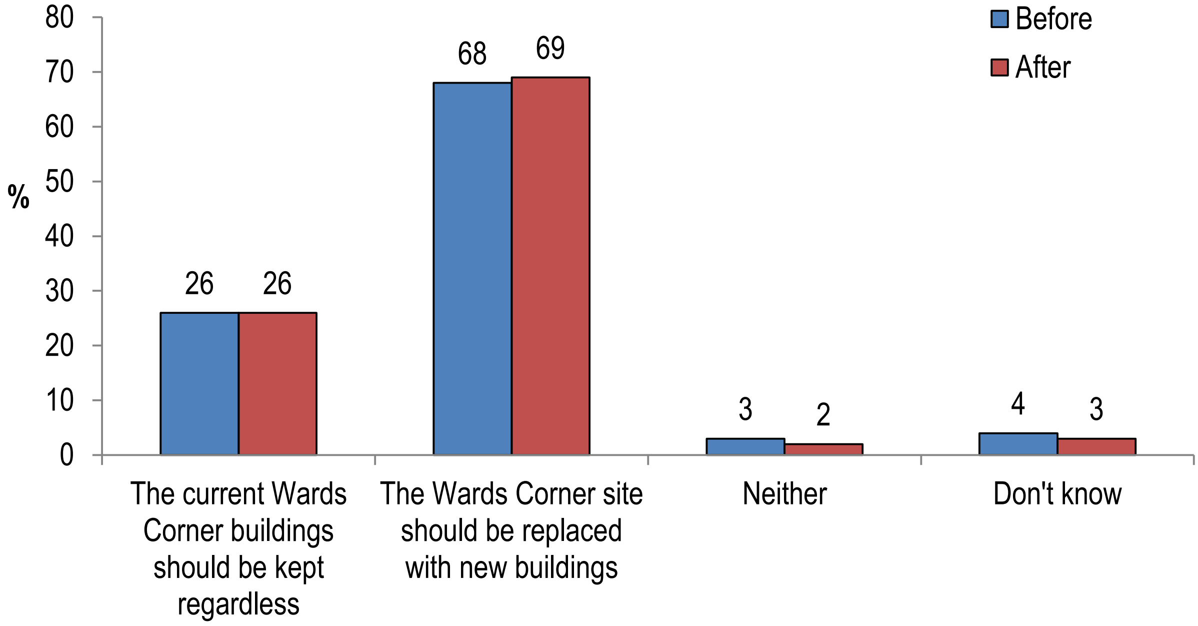
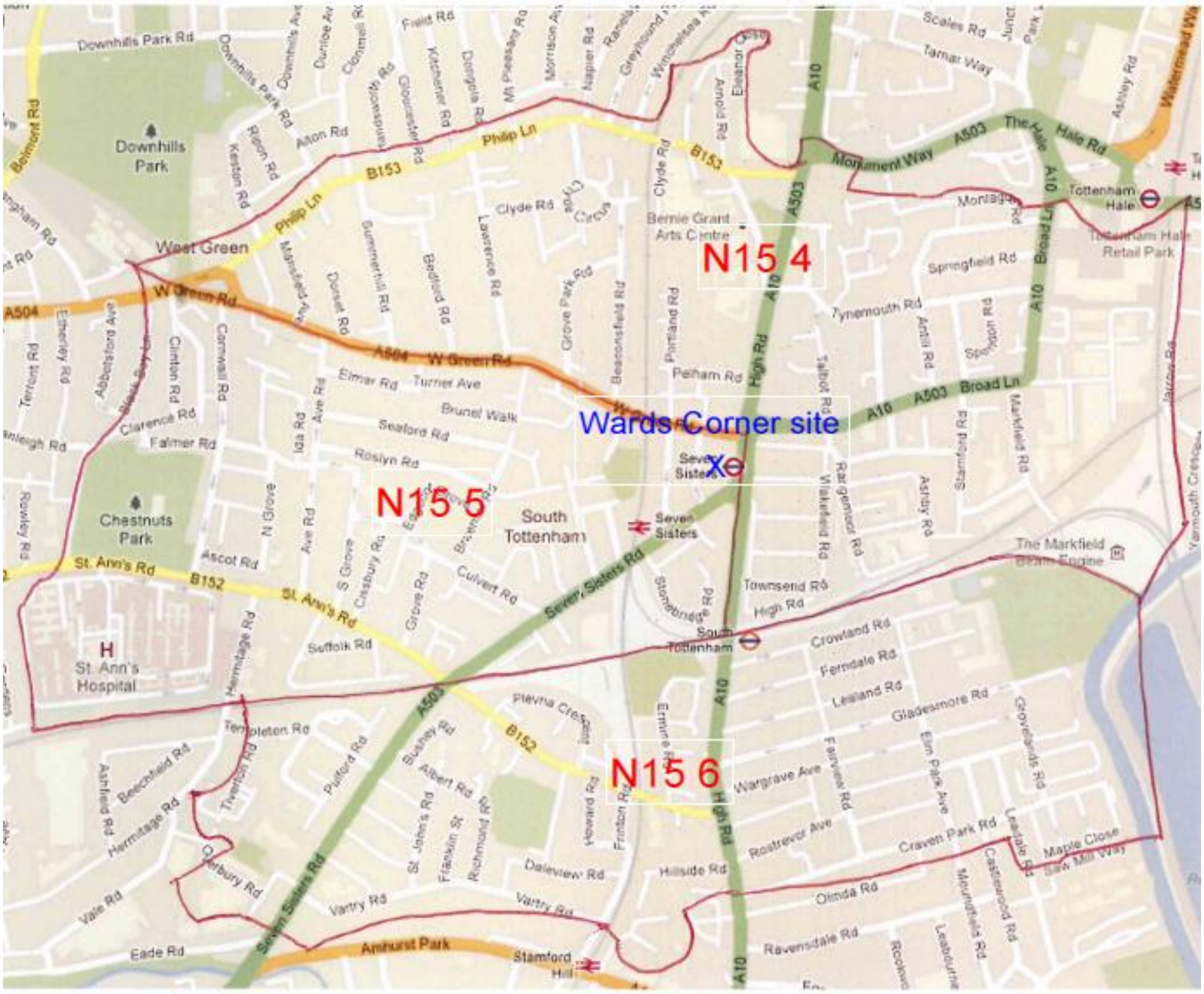


Fig 9.1 Preference for the future of the buildings before and after seeing images
Base: All residents

- Again, a comparison of the overall figures before and after having seen the images does not appear to suggest that the images make much of an impression on the preferences of local people. Indeed, 68% say that the Wards Corner site should be replaced with new buildings at Q12, before having seen the images compared to 69% who think this after seeing the images at Q14.
    - However, 14% of those who say that the buildings should be kept regardless at Q12 actually then think that the site should be replaced with new buildings, after having seen the image at Q14.
        - While this is not as pronounced a shift as that seen in overall favourability in the previous question, it is still significant and suggests that the use of computer generated images has potential to be an effective tool in shifting attitudes, and increasing support for the proposed development.
    - By contrast, 5% of those who said at Q12 that they thought the site should be replaced with new buildings, then say that the current buildings should be kept regardless after having seen the image at Q14.

APPENDIX ONE – Postcode area map

During the fieldwork of the survey, we conducted interviews with respondents from the three postcode that surround the Wards Corner site; N15 4, N15 5 and N15 6. The research throws up some interesting micro-geographical differences between the attitudes of residents in the three areas that are worthy of consideration for GL Hearn and which are flagged up later on in the report. The map below outlines the boundaries of each of these postcode areas for reference.



NB. This screenshot is taken from Google Maps and is protected by copyright. As such, it cannot be reprinted for public consumption.

APPENDIX TWO – Images of site as it is now shown before Q10

APPENDIX THREE – Computer generated images of potential redevelopment shown before Q13