

TIRANA SHOPPING STREET SURVEY 2024



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Methodology

The Shopping Street Survey aimed to gain insights into the mobility behaviour of shop owners and customers on the three main commercial streets in Tirana (as shown in the map).

Surveyors randomly intercepted potential customers along both sides of the streets, while shop owners were approached inside their shops. Participants were asked about their modes of transport, spending habits, and travel distances.

The survey was conducted over two weeks in June, from 8 AM to 8 PM. This iteration followed the same methodology used in October 2021, with the addition of questions about customers' spending habits.

We asked **306 retailers** and a total of **6600 shoppers**.

54% of shop owners were girls or women.

while **62%** of customers were girls or women.

The survey has been conducted

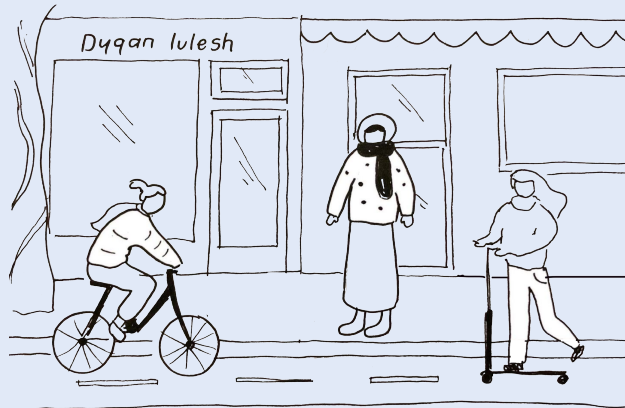
in collaboration with **Qendra Steps**.



Hypotheses

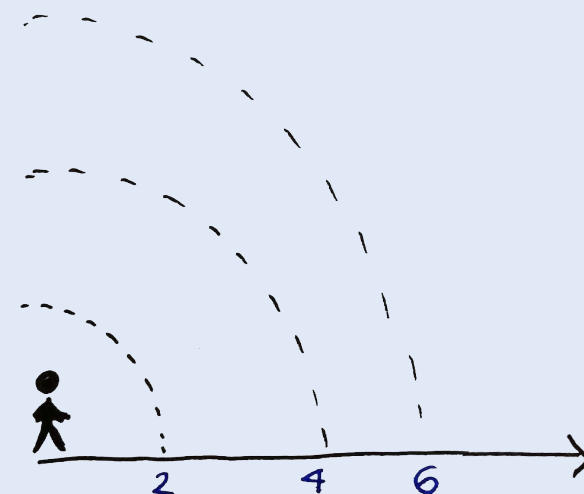
HYPOTHESIS 1

Most shoppers use sustainable modes of transport to get to the shopping street.



HYPOTHESIS 2

Shopping is local: The majority of customers live nearby, less than 5km and ideal for sustainable modes.



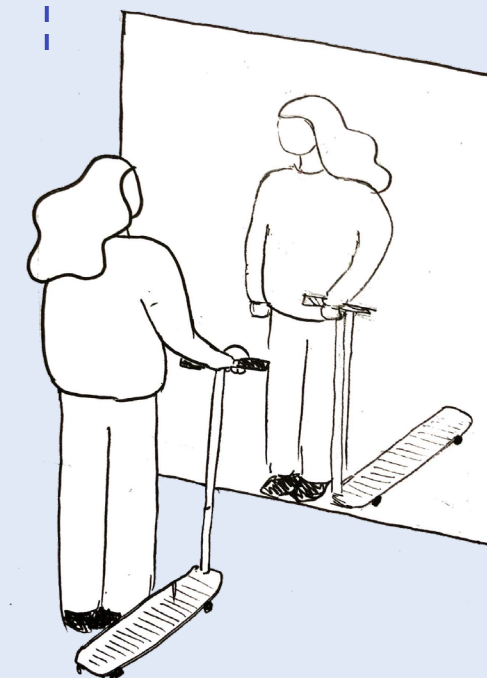
HYPOTHESIS 3

Retailers overestimate the proportion of customers that travel to the street by car, and underestimate other modes. Retailers estimates of shopper travel behavior correlate with their own travel behavior.



HYPOTHESIS 4

Customers who use sustainable modes of transport visit more frequently.



HYPOTHESIS 5

Shops generate more revenue from customers who use sustainable modes of transport.



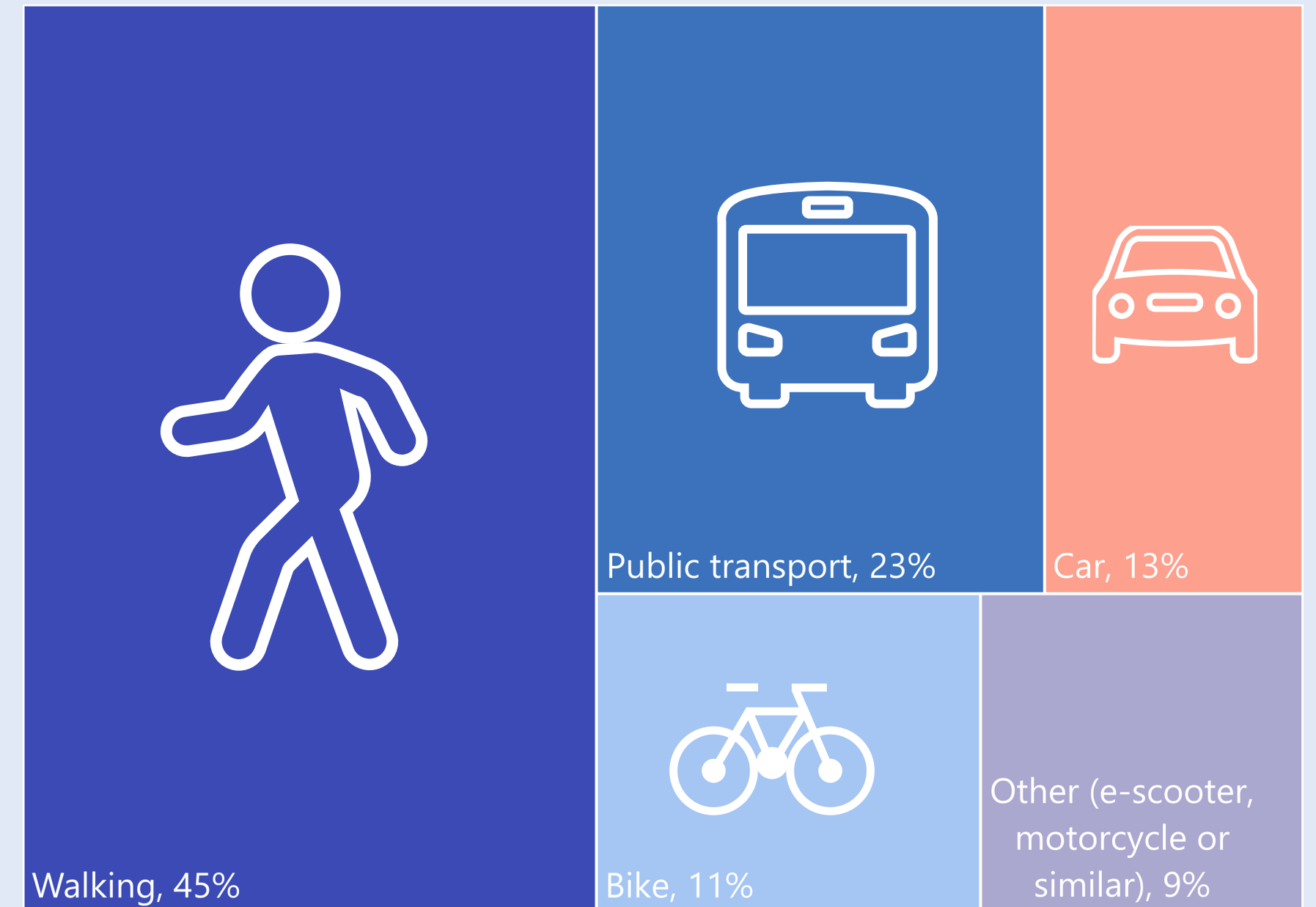
HYPOTHESIS 1 Most customers use sustainable modes of transport to get to the shopping street

87%

of surveyed customers did not use the car to come to the surveyed streets. They **came by foot, by public transport, by bike or other modes.**



Compared to the previous survey (October 2021), the reported usage of public transport **increased by 9 percentage points.**

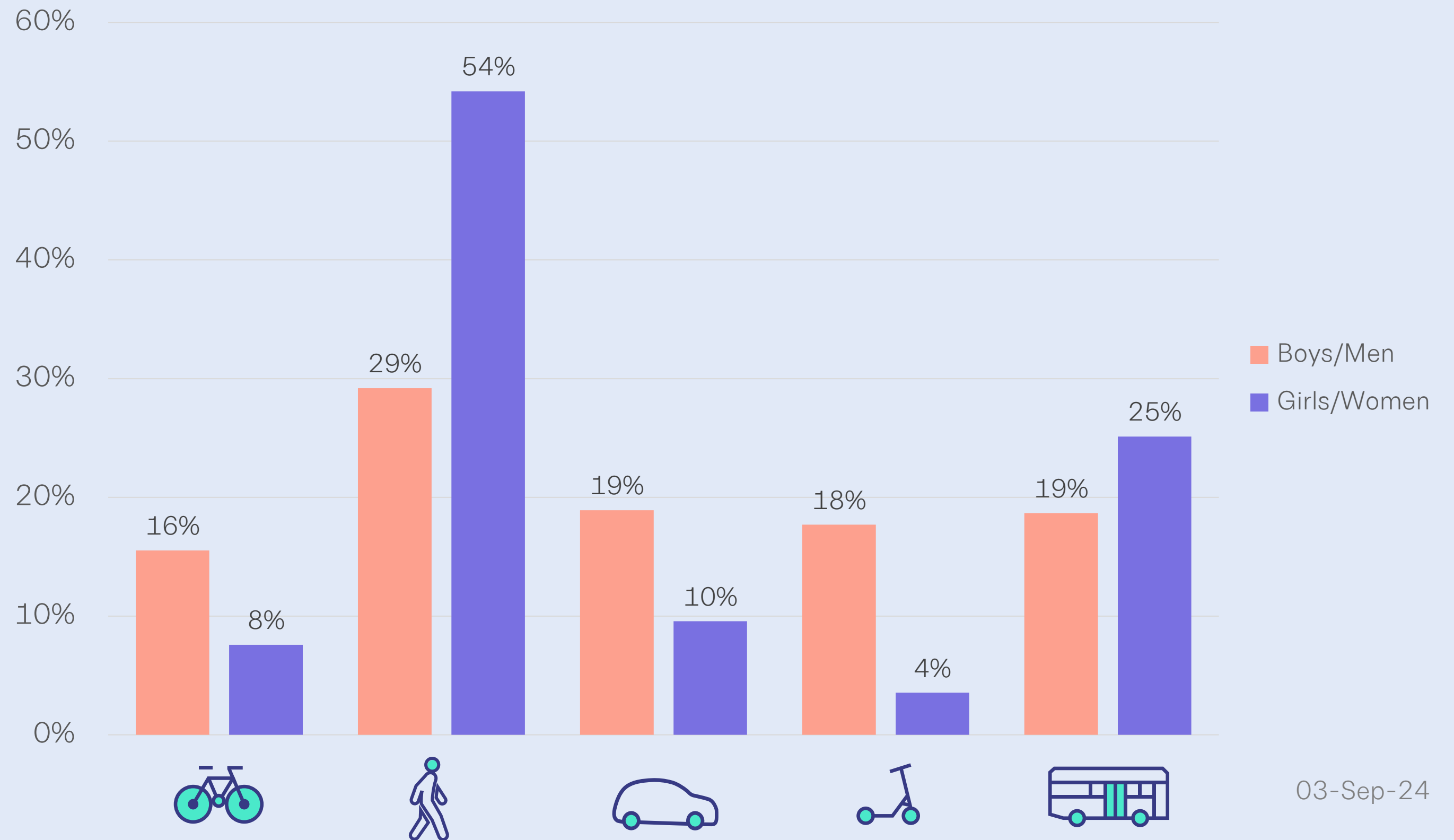


Customers' Modal Share

HYPOTHESIS 1 Girls and women are more likely to use sustainable modes of transport

Girls and women are almost **twice as likely** as boys and men **to walk** to the shopping streets.

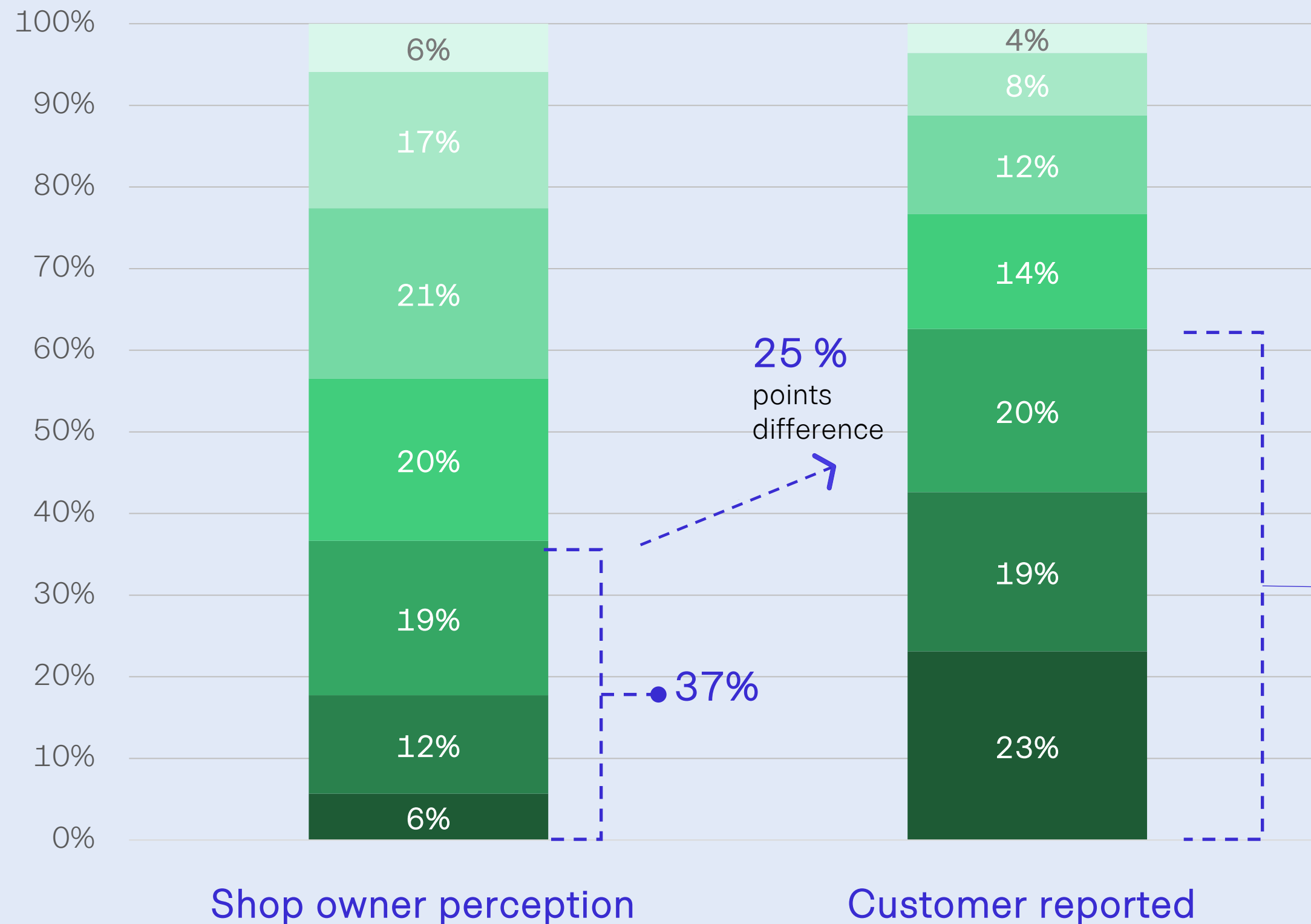
86% of girls/women use sustainable modes of transport, compared to 63% of boys/men.



HYPOTHESIS 2 Shopping is local: The majority of customers live nearby, less than 3 km and ideal for sustainable modes

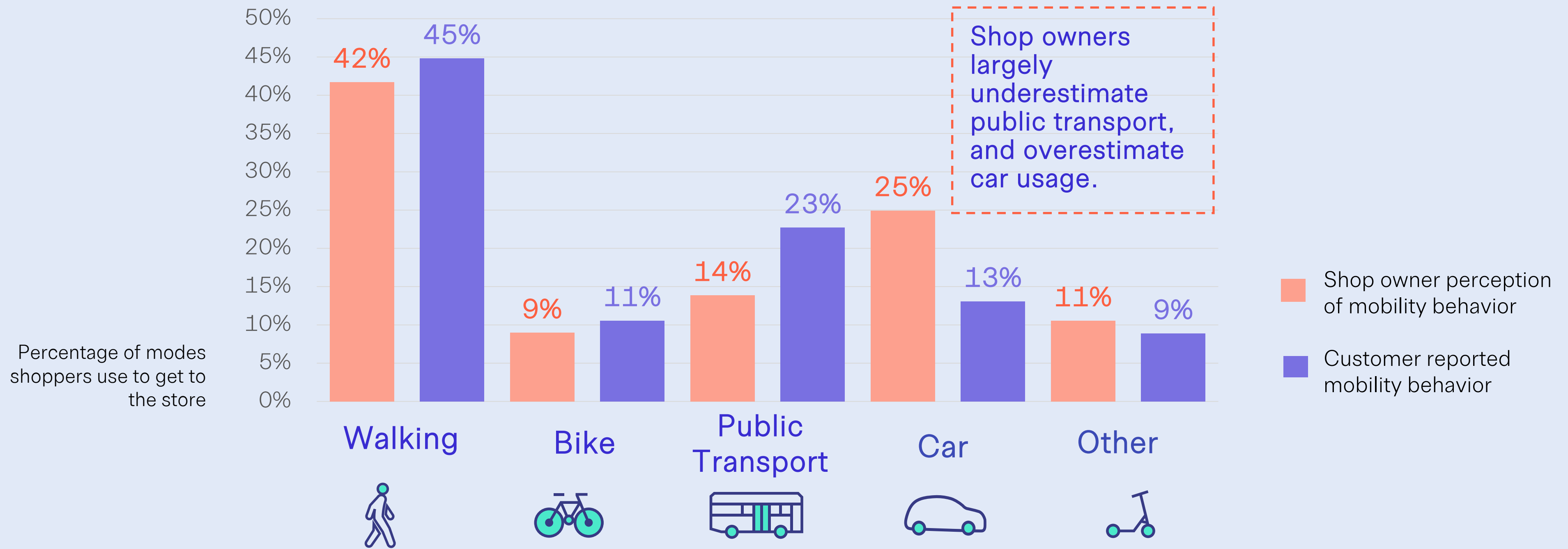
Distance to shop

- 10+ km
- 5-10 km
- 4-5 km
- 3-4 km
- 2-3 km
- 1-2 km
- Less than 1 km

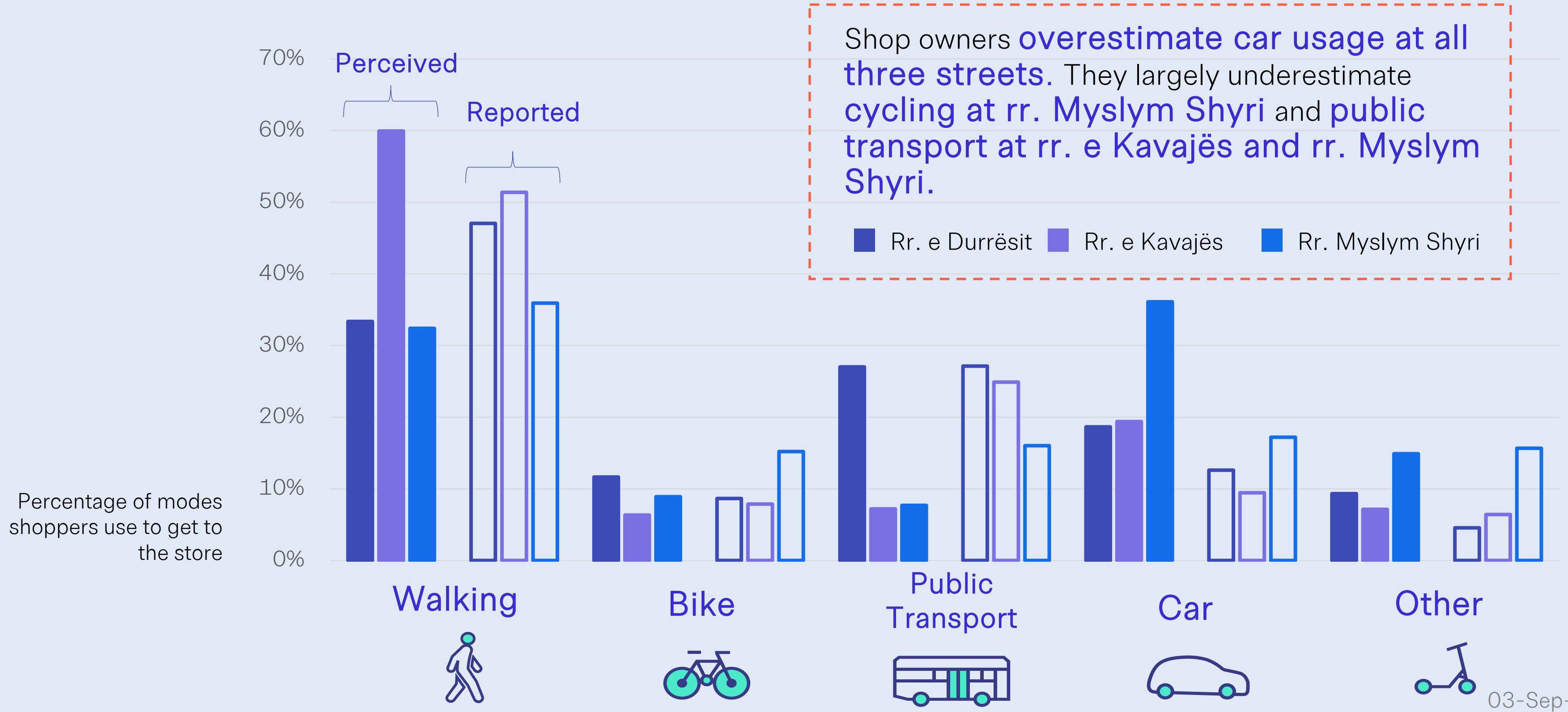


Shopping is local: **62%** of surveyed customers live **less than 3 km** from their shopping street. **3 out of 5 girls and women are local customers** (live within 3 km), as opposed to 30% of boys/men.

HYPOTHESIS 3 Retailers overestimate the proportion of customers that travel to the street by car, and underestimate other modes



HYPOTHESIS 3 Retailers overestimate the proportion of customers that travel to the street by car, and underestimate other modes



HYPOTHESIS 3 Retailers estimates of shopper travel behavior correlate with their own travel behaviour

Shop owners using **public transport** assume over-proportionally that their customers **walk**.
 Shop owners using car, or other means of transport over-proportionally assume their customers use the same means of transport.

	Public Transport	Car	Bike	Walking	Other
Shop owners who use public transport (12%)	16%	20%	7%	50%	7%
Shop owners who travelled by car (30%)	17%	31%	9%	33%	10%
Shop owners who bike (11%)	14%	21%	14%	38%	13%
Shop owners who walk (32%)	13%	20%	9%	48%	9%
Shop owners who use other means (14%)	9%	25%	11%	42%	13%

Table 1. Shop owners' averaged estimation of customers transport mode sorted by shop owner's own transport mode. Grey highlights where shop owners' estimate of the mode they also use is highest.

HYPOTHESIS 4 Customers who use sustainable modes of transport visit more frequently

66% of daily customers are coming by foot, showing the importance of pedestrians for the vitality of local shops. Overall, **1 in 4 customers** are pedestrians that visit the street daily.

Sustainable modes of transport make up **94% of daily visits**.

How often do you visit this street?	Less than once a week	Once a week	2 – 3 times a week	Five times a week	Every day	Average (visits per week)
Walking (45% of all customers)	29%	28%	35%	32%	66%	5.1
Public Transport (23%)	28%	28%	23%	30%	16%	3.8
Car (13%)	30%	19%	16%	12%	6%	2.9
Bike (11%)	6%	12%	13%	16%	8%	4.06
Other (E-scooter, motorcycle, or other, 9%)	7%	14%	13%	10%	5%	3.51

Table 2. Frequency of visit to shopping street by mode, as a percentage of the total frequency category (i.e.: each column is 100%). Grey highlights highest value for each frequency category (i.e.: highest value for daily visits).

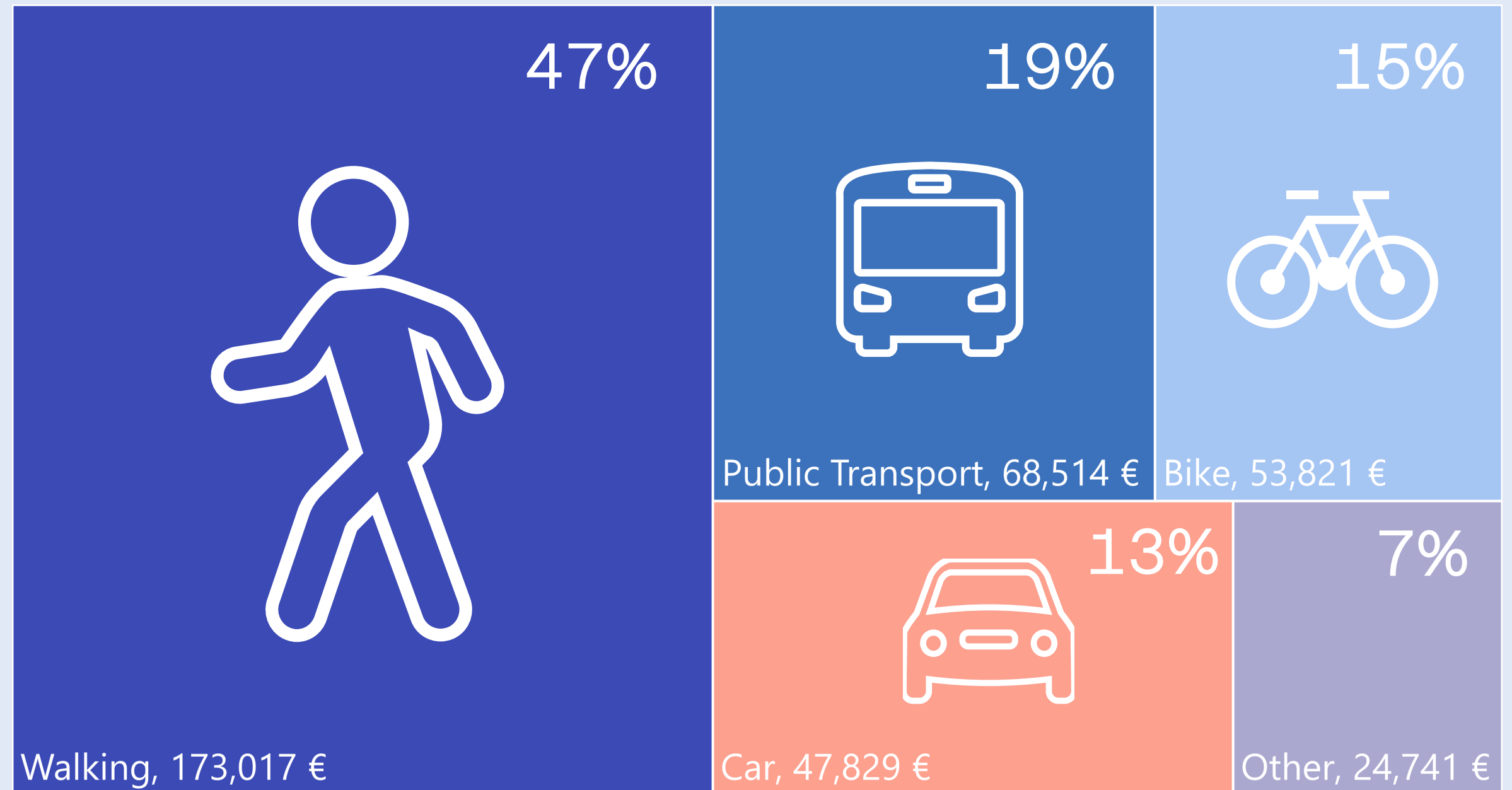
HYPOTHESIS 5 Shops generate more revenue from customers who use sustainable modes of transport

Customers who visit by car and by bike spend the most money per visit (**19 €**). However, they visit **far less frequently** than customers who come by foot or by bus – therefore, customers arriving by sustainable modes of transport spend more money per week.

	Average spending per visit	×	Average visits per week	=	Average spending per week
	11 €		5.1		56.1 €
	12 €		3.8		45.6 €
	19 €		4.06		77.1 €
	19 €		2.9		55.1 €
	12 €		3.51		42.1 €

HYPOTHESIS 5 Shops generate more revenue from customers who use sustainable modes of transport

Pedestrians generate **47%** of profits for shop owners in a week, **4 times more profits than cars**. Customers arriving by sustainable modes of transport are responsible for **87%** of local business weekly revenue.



Total money spent in a week, by mode of transport

Conclusion

Our study method and results are in line with similar studies carried out in North America, Australia, Great Britain, Austria as well as Germany. In all places, the conclusions are more or less the same: **walking and cycling as well as public transport infrastructure is likely to benefit the local economy.** The investment and space allocation for car infrastructure is not proportional to the actual importance of cars for local businesses — only 1 in 10 customers uses a car to visit these shopping streets. In addition, **pedestrians** are responsible for **generating approximately half of the revenue** for the local businesses in these streets.

Therefore, investment into sustainable mobility in Tirana responds to the needs of the largest customer base, and contributes to a vital local business ecosystem.



Conclusion

HYPOTHESIS 1

Most customers use sustainable modes of transport to get to the shopping street



True: 87% of customers do not use the car.

HYPOTHESIS 2

Shopping is local: The majority of customers live nearby, less than 5km and ideal for sustainable modes.



Mostly true: Shop owners over-estimate car usage and underestimate other modes. Most of them estimate that their own mode of transport is also the preferred mode of their customers

HYPOTHESIS 3

Retailers overestimate the proportion of customers that travel to the street by car, and underestimate other modes. Retailers estimates of shopper travel behavior correlate with their own travel behavior.



True: 88% of customers live less than 5km away; 62% live less than 3km away.

HYPOTHESIS 4

Customers who use sustainable modes of transport visit more frequently.



True: 1 in 4 daily customers are pedestrians, showing the importance of pedestrians for the vitality of local shops.

HYPOTHESIS 5

Shops generate more revenue from customers who use sustainable modes of transport.

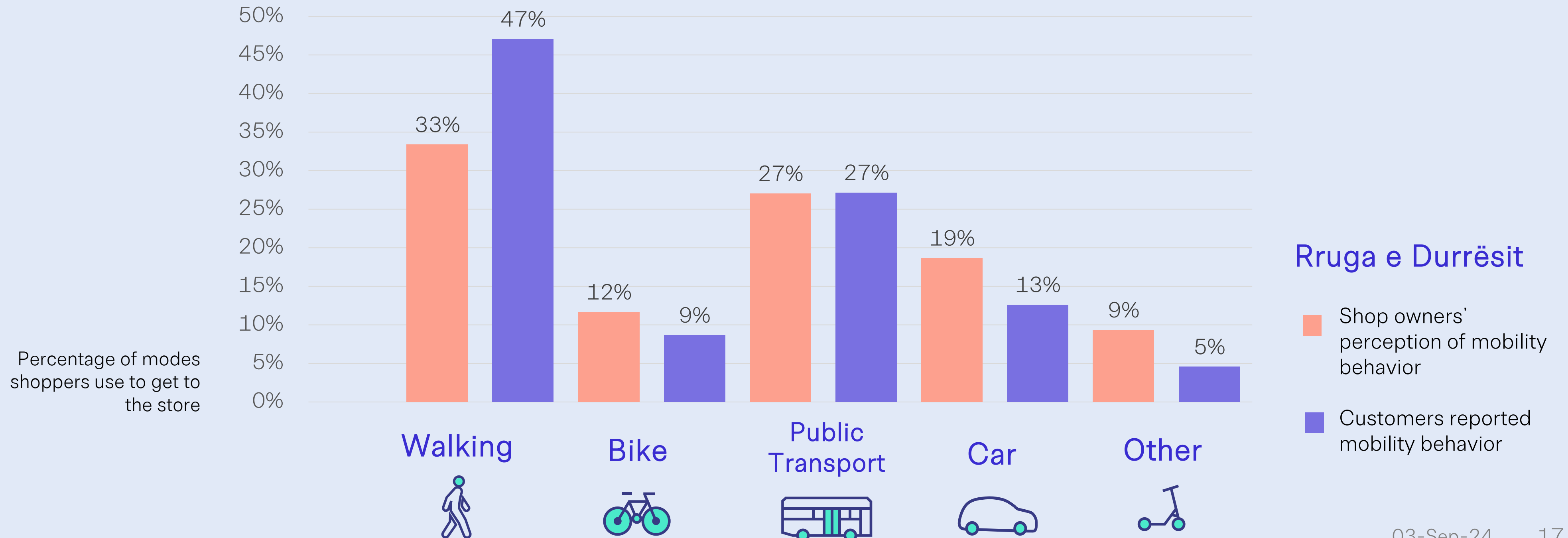


True: Pedestrians generate 47% of profits for shop owners in a week, 4 times more profits than cars. Customers arriving by sustainable modes of transport are responsible for 87% of local business weekly revenue.

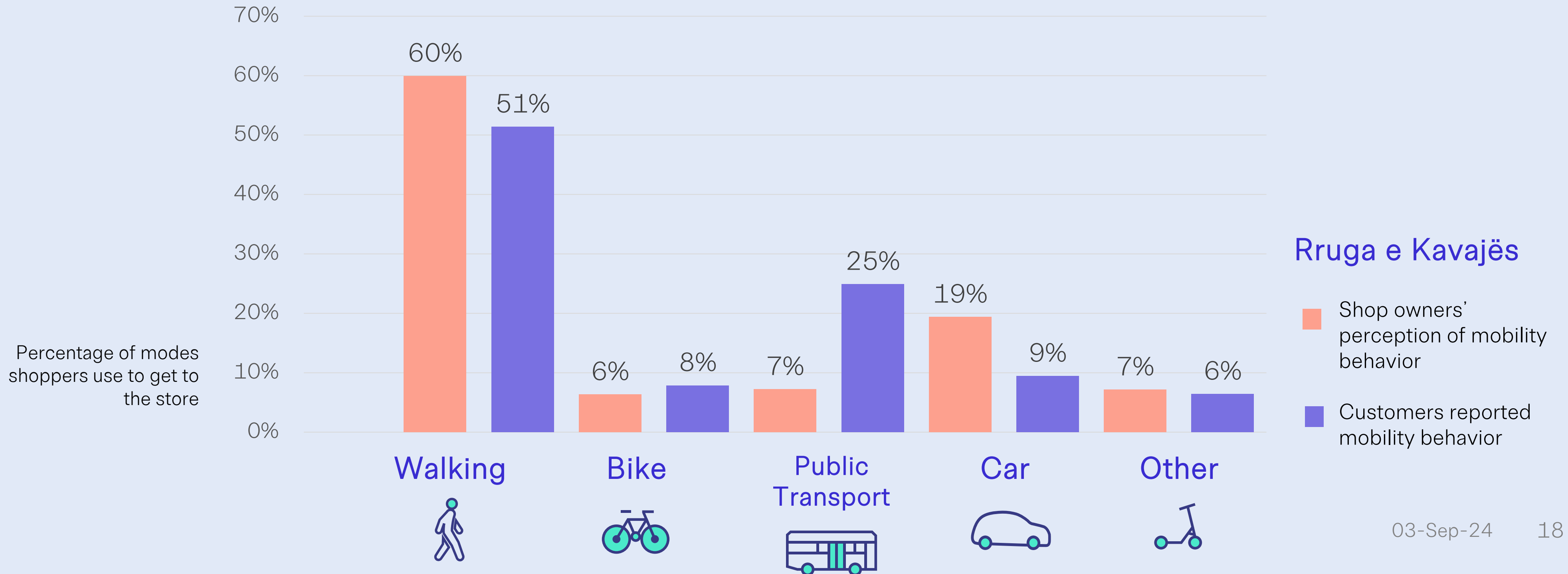
Annex

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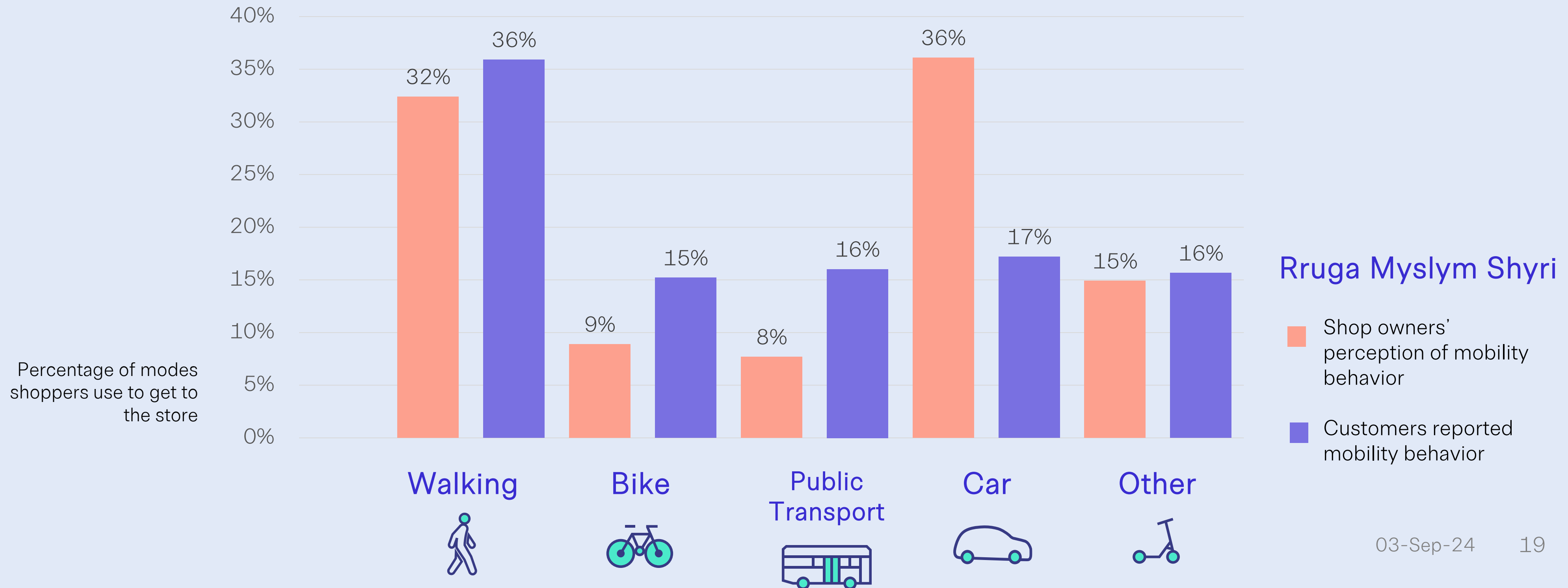
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HYPOTHESIS 2 Retailers overestimate the proportion of customers that travel to the street by car, and underestimate other modes



Annex

Questions for retailers:

- Could you please estimate the proportion of customers using each transport mode (foot, bicycle, public transport, car, other (e-scooter, motorbike and similar));
- Could you please estimate the average travel distance of your customers;
- What mode of transport do you use to get to your business?

Questions for customers :

- Which mode of transport (foot, bicycle, public transport, car, other (e-scooter, motorbike and similar) did you use to get to the shop/street?
- What is the distance from the street to your home?
- What is the main reason for the visit?
- How often per week do you visit the street?

Study conducted in collaboration with:

Qendra Steps, Tirana, Albania



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