Transport for London

Town centre study 2011

10062

September 2011

MAYOR OF LONDON

Transport for London

Research conducted by Accent

CONTENTS

EXECUTIVE SUMMARY

Introduction

TfL commissioned research to establish the contribution made by bus users and other modes to the economic health and viability of town centres across London.

This research follows previous town centres studies in 2009, 2003-4 and 1999. The locations varied between studies although a few were covered in one or more. The locations were always a mix of regional, local and international town centres.

Method

Face-to-face research was conducted on-street with a sample of about 300 visitors to each of 15 town centres.

- **Central London**: Oxford Street/Regent Street
- **Inner London**: Camberwell, Clapham Junction, Greenwich, Hackney, Enfield, Stratford
- **Outer London**: Bromley, Bexleyheath, Croydon, Ealing, Harlesden, Harrow, Kingston, Wood Green.

Fieldwork was conducted between 3 and 27 March 2011. 4,746 interviews were conducted, about 300 at each town centre.

In addition, at seven town centres boosters of about 50 cyclists were interviewed.

Main Findings

- Purpose of Visit
  - The majority of visitors to most town centres lived and/or worked more than ten minutes walk from the town centre.
  - Shopping was the main reason for visiting the town centres: for 78% it was one of the purposes and for 53% the main purpose. Eating and drinking out was also important being mentioned by 22% but was only the main purpose for 5%.

- Time Spent in Town Centre
  - 75% of visitors were planning to spend at least one hour in the town centre with 49% spending between one and three hours.
  - Those who walked and cycled to the area tended to spend less time in the town centre. Those who travelled by train/Tube (85%), car (81%) and bus (77%) were planning to spend more than an hour in the town centre.

- Frequency of Visiting
  - 75% of visitors were visiting the area once a week or more often. The average number of visits per month was 11.
  - Those who walk to the area are the most frequent visitors (51% visit five days a week or more) followed by cyclists (38%) and bus users (26%). Car users visit less often (16%).

- Shopping and Expenditure in the Area
  - 46% were shopping for groceries and food, 33% were shopping for clothes or footwear, 18% were using a service and 17% were eating out.
  - The average spend was £36 on the day of interview which is similar to the usual spend per visit (£32). The average spend per week was £72. The mean monthly spend is £290
  - Average spend per visit by mode was car £41, train/Tube £38, bus £32, walk £26 and cycle £21.
  - Average spend per week by mode was walk £93, bus £70, train/Tube £59, car £56 and cycle £47
  - Average spend per month by mode was walk £373, bus £282, train/Tube £239, car £226 and cycle £188.

- Mode of Transport
  - 36% use bus to access the town centre, 28% walk, 17% use train/Tube, 14% use car and 2% cycle.
  - 52% use Tube or train to go to Central London (4-5% elsewhere). 19% use car in Outer London town centres compared to 8% in Inner London and 2% in Central London.
  - The main reason for using each mode is: car: quicker (32%), bus: cheaper (22%), train/Tube: quicker (48%), cycle: need/enjoy the exercise (33%) and walk: live very close by (30%).
  - Walking was the most frequently used mode. The weekly mean frequency for the different modes was: car 1.7, bus 2.7, train/Tube 2.1, bicycle 3.1 and walk 3.8.
  - Car drivers were satisfied with the ease of access to town centre by car and the number of parking spaces provided (mean scores of 7.1 and 6.5 respectively on a scale from 0, very dissatisfied to 10, very satisfied).

- Attitudes to and Use of Bus
  - Over three quarters sometimes use the bus to travel in the area of the town centre.
  - Bus use increased by 3% compared to twelve months ago
  - Bus customers were most positive about the ease of getting on and off the bus (mean score 7.9) and the convenience of bus stops (7.7). Bus users were least satisfied with the level of crowding on the bus (6.8) and value for money (6.9).
  - There was strong agreement that there should be stricter bus lane enforcement (mean score 7.8), that bus stops are conveniently located (7.6) and for goods vehicles not to be allowed in bus lanes (6.9).
  - The top three single factors that would encourage greater use of the bus were lower fares (12%), more regular buses (9%) and direct bus routes (7%).

- Attitudes towards Town Centres
  - The main ways that the town centres could be improved were better range of shops (30%), to make the streets cleaner (26%) and less traffic (21%).
  - 66% of town centre visitors felt very safe and 28% felt fairly safe during the day. Of those who went out in the town centre after dark, only 26% said they felt very safe and 39% fairly safe.

- Oxford Street/Regent Street
  - Oxford Street is visited because of its shopping facilities: 27% considered it to be the best shopping area, 21% were visiting a particular shop and 15% cited ‘more/better/bigger range of shops’.
  - 36% were aware of the changes to travel around Tottenham Court Road. This is twice the proportion as in 2009.
  - Of those who were aware 51% knew it was because of building rail/Crossrail station.
  - Only 8% of visitors to Oxford Street/Regent Street said they were affected by the travel changes around Tottenham Court Road.
  - 53% had used the diagonal crossing at Oxford Circus and there were very high levels of satisfaction with both the safety and ease of crossing the road on the diagonal crossing.

1. INTRODUCTION

1.1 Background

TfL has made significant improvements to and investment in the transport infrastructure in London resulting in high levels of bus use as well as increasing levels of cycle and walking trips.

TfL commissioned research to establish the contribution made by bus users and other modes to the economic health and viability of town centres across London.

This research follows previous town centres studies in 2009, 2003-4 and 1999.

1.2 Objectives

The main objective of the research is to determine the shopping behaviour, frequency and spend of visitors by different modes in selected town centres. Other specific objectives are:

- to look at modal split, catchment area by mode and perceptions of accessibility
- to compare the shopping behaviour and contribution of bus passengers to car users and users of other modes including walk and cycle.

2. METHODOLOGY

2.1 Introduction

The research was conducted on-street with a sample of visitors to each of the selected town centres

The research was undertaken in 15 locations around London. These were selected by TfL in order to provide a range of different types of centre in terms of economic mix, scale of retail activity/presence of major stores, transport networks, road layout, traffic flow, parking provision etc as well as allowing for some comparisons with previous Town Centres surveys. The locations were:

- Bexleyheath
- Bromley
- Camberwell
- Clapham Junction
- Croydon
- Ealing
- Greenwich
- Hackney
- Harlesden
- Harrow
- Kingston
- Oxford Street/Regent Street
- Stratford
- Wood Green
- Woolwich.

Bromley, Kingston and Oxford Street/Regent Street were also surveyed in 2009 and 2004. Camberwell, Clapham Junction, Croydon, Hackney and Wood Green were also surveyed in 2009. Harlesden and Harrow were also surveyed in 2004.

For analysis purpose these were grouped as follows:

- **Central London**: Oxford Street/Regent Street
- **Inner London**: Camberwell, Clapham Junction, Greenwich, Hackney, Enfield, Stratford
- **Outer London**: Bromley, Bexleyheath, Croydon, Ealing, Harlesden, Harrow, Kingston, Wood Green.

In addition, analysis was undertaken by the town centre categories as used in the London Plan.

- **International**: Oxford Street/Regent Street
- **Metropolitan**: Bromley, Croydon, Ealing, Wood Green, Harrow, Kingston
- **Major**: Bexleyheath, Clapham Junction, Woolwich, Stratford
- **District**: Harlesden, Camberwell, Hackney, Greenwich.

2.2 Method

Face-to-face interviews using a Computer Aided Personal Interview (CAPI) questionnaire programmed for Personal Digital Assistants (PDAs) were undertaken for the majority of the fieldwork. This was supplemented with face-to-face interviews using paper questionnaires[1].

At each town centre interviewing was conducted at two or three Enumeration Points (EPs) in order to ensure that all parts of the centre were included and all types of visitor were covered.

For each town centre a map was used as show material during the interviews. The maps show the specific area of interest that respondents should consider when completing the interview. Also shown on the maps are the locations where the interviewers stood to conduct the fieldwork (the Enumeration Points (EP), shown as a number in a black circle).

Respondents were selected using a random 1 in 3 approach.

All interviews were conducted with adult visitors to the area. Visitors were described as anyone visiting the town centre (as shown on a map) to use the shops or facilities (ie retail based facilities/services, entertainment etc) of the town centre at the time of interview.

Those just passing through (eg on their way to work, just happen to live/work in the area and not using the shops/facilities at that time) were excluded (except at Oxford Street/Regent Street).

The core fieldwork was conducted between 3 and 27 March 2011. The target was 300 interviews in each of the town centres: 4,500 interviews in total.

In practice 4,746 interviews were conducted as follows:

- Camberwell 316
- Clapham Junction 330
- Croydon 298
- Bexleyheath 313
- Bromley 364
- Ealing 299
- Greenwich 325
- Hackney 318
- Harlesden 303
- Harrow 295
- Kingston 319
- Oxford Street/Regent Street 321
- Stratford 313
- Wood Green 331
- Woolwich 301.

[1] for technical reasons eg when batteries ran low

The cycle boosters were conducted between 3 March and 8 April 2011.

Interviews were spread over different days and times in order to provide a spread of different types of visitor to the town centre locations. Interview shift times were:

- Weekdays: 08:00-14:00 and 12:00 to 18:00
- Saturdays: 10:00-16:00 and 12:00 to 18:00
- Sundays: 11:00-17:00.

The target distribution of interviews was 70% weekday, 20% Saturday and 10% Sunday. The initial shift distribution was: 69% weekday, 25% Saturday and 6% Sunday and the achieved interview distribution was 69% weekday, 24% Saturday and 7% Sunday.

Weights were applied so that the data matched the target distribution by weekdays, Saturdays and Sundays. Details of the weighting factors applied to the data are included in Appendix C.

Where the town centre had been covered before we used the same EPs as before. For 'new' town centres[2] the selection of the locations was on the basis that they provided good customer traffic flow, eg central points within the town.

Cycle Boosters

At the following seven town centres cycle boosters were undertaken with the aim of achieving 50 interviews with those who accessed the town centre by cycle.

- Bexleyheath
- Bromley
- Croydon
- Ealing
- Harrow
- Kingston
- Oxford Street/Regent Street.

Questionnaire

The questionnaire was based on the one used in the previous Town Centre surveys. The previous questionnaires were mainly based on the impact of bus service improvements. This research focused less on bus and included the following 'new' areas:

- Road safety for cyclists and pedestrians
- Diagonal crossings at Oxford Circus
- On line shopping
- Encouraging cycling.

A copy of the paper version of the final questionnaire is included in Appendix A.

[2] Bexleyheath, Ealing, Greenwich, Stratford and Woolwich

Pilot

A small scale pilot was conducted on Friday 18 February to test the questionnaire, the recruitment procedure and response rate.

3. FINDINGS

3.1 Introduction

This chapter sets out the findings of the 2011 Town Centre study.

Changes over time

A similar research approach and questionnaire has been used in the last three phases of town centres studies (2011, 2009 and 2003-4) and this provides an opportunity for temporal comparisons. A 1999 study into town centres covered some of the same questions as the three more recent studies and covered 12 town centres of which Harrow was the only town centre also covered in 2011[3].

The table below sets out which town centres have been covered over the last three studies. As only three town centres have been covered in all three surveys (dark grey shading) and another eight have been covered in two of the surveys (light grey shading) the comparisons for key data in this report have been made across the overall samples for all three surveys.

	2004	2009	2011
Bexleyheath			✓
Bromley	✓	✓	✓
Camberwell		✓	✓
Chingford		✓	
Clapham Junction		✓	✓
Croydon		✓	✓
Dalston	✓		
Ealing			✓
Eltham	✓		
Enfield		✓	
Feltham	✓		
Greenwich			✓
Hackney		✓	✓
Harlesden	✓		✓
Harrow	✓		✓
High Street Kensington	✓	✓	
Ilford	✓		
Kingston	✓	✓	✓
Neasden		✓	
Oxford Street/Regent Street	✓	✓	✓
Peckham	✓		
Richmond		✓	
Romford		✓	
Stratford			✓
Wembley		✓	
Wood Green		✓	✓
Woolwich			✓

[3] Of the other 11 town centres only Richmond and Eltham were also covered in 2004 or 2009.

Structure

The research findings are structured as follows:

- Nature of visit
  - 3.2 Purpose of Visit
  - 3.3 Time Spent in Town Centre
  - 3.4 Frequency of Visiting
- Travel to town centre
  - 3.5 Mode of Transport
  - 3.6 Attitudes to and Use of Bus
  - 3.7 Encouraging Cycling

- Attitudes
  - 3.8 Attitudes towards Town Centres
  - 3.9 Use of Other Shopping Centres

- Oxford Street/Regent Street

- Goods purchased and spend
  - 3.11 Shopping and Expenditure in the Area
  - 3.12 Average Spend
  - 3.13 Online Shopping

- Respondent Characteristics.

Appendix B contains data on demographics, mode of access, frequency of visit, main purpose, spend and town centre improvements by town centre. Further data is available on request.

3.2 Purpose of Visit

Summary

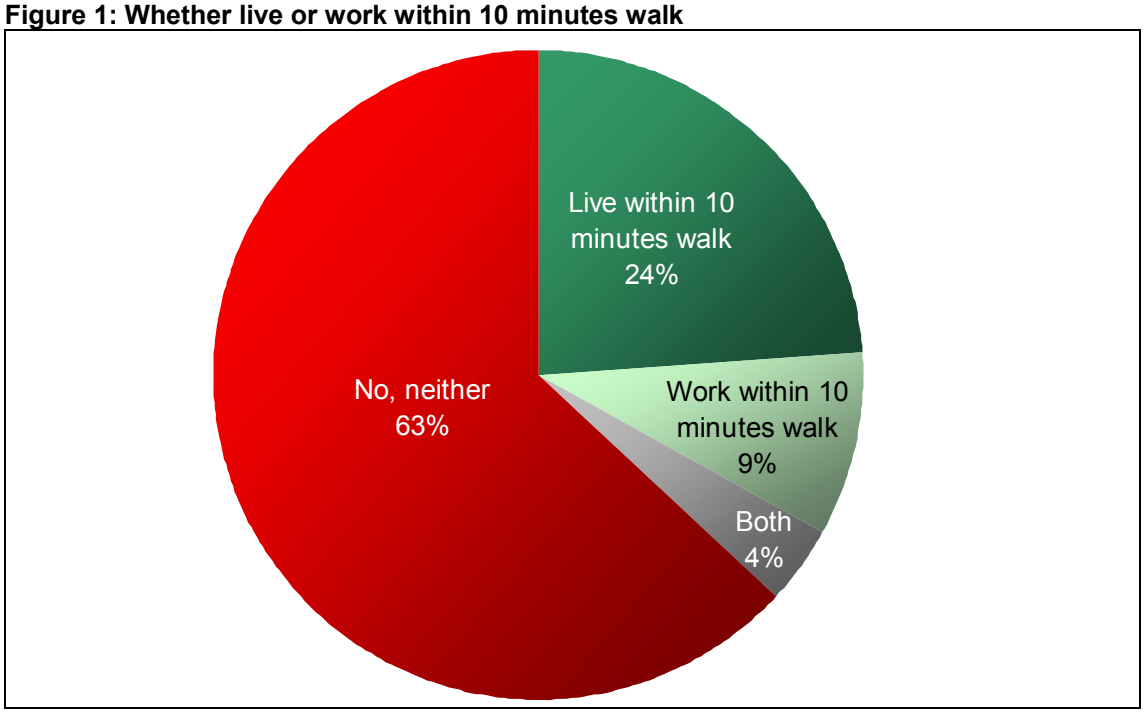
The majority of visitors to most town centres lived and/or worked more than ten minutes walk from the town centre.

Visitors to Inner London town centres were much more likely to live within 10 minutes of the centre (34%) than those visiting Outer London town centres (25%) or Central London (3%).

Shopping was the main reason for visiting the town centres: for 78% it was one of the purposes and for 53% the main purpose. Eating and drinking out was also important being mentioned by 22% but was only the main purpose for 5%.

The town centres are used by both those who live and work in the area and by visitors from outside the area. The majority (63%) do not live or work within 10 minutes walk of the town centre but 24% live in the area, 9% work in the area and 4% both live and work within 10 minutes walk of the town centre.

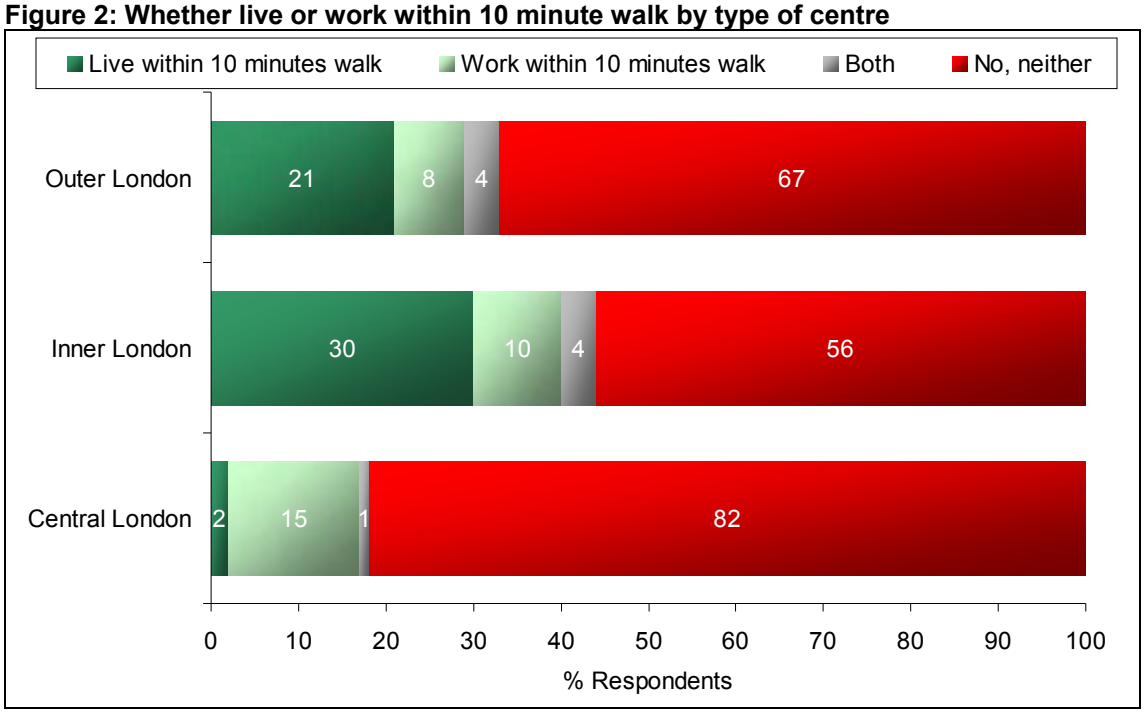
Figure 1: Whether live or work within 10 minutes walk



Weighted base: all respondents: 4,745

Figure 2 shows that those visiting Inner London town centres were much more likely to live within 10 minutes of the centre (34%[4]) than those visiting Outer London town centres (25%) or Central London (3%).

Figure 2: Whether live or work within 10 minute walk by type of centre



Weighted base: Central London 320; Inner London 1,904; Outer London 2,521

Oxford Street/Regent Street and Bromley were the locations most likely to attract visitors from a wider catchment area (82% and 77% respectively from more than 10 minutes walk away). By contrast, over half of those visiting Harlesden and Clapham

[4] 30% live and 4% live and work

Junction (56% and 54% respectively) and half visiting Camberwell lived or worked within 10 minutes of the town centre.

Comparison over time

There has been a slight increase over time in the proportion visiting town centres from further than 10 minutes walk away.

	2011	2009	2004
Live/work within 10 minutes walk	37%	38%	41%
Neither	63%	62%	59%

Reasons for visiting town centre

All visitors were recruited on the basis that they were shopping, using a service or doing both in the centres[5]. Shopping was the predominant purpose and the main reason for visiting for just under eight in ten of the visitors. Eating and drinking out was also important, being mentioned by 22%, but was only the main purpose for 5%. All reasons and the main reasons for visiting the area are as shown in Table 1.

Table 1: Reasons for visiting town centre

	All purposes %	Main purpose %
Shopping	78	53
Eating/drinking out	22	5
Using service	20	8
Live here	14	6
Work here	12	10
Window shopping	9	2
Other social/leisure	6	2
Personal business	6	4
Visiting friends and relatives	6	3
Using public amenity	5	3
General recreation	3	1
Travelling through the area	3	1
Dropping off/picking up friend or relative	1	1
Buying petrol	*	*
Delivering goods	*	*
Other	2	1
Weighted base	**4,746**	**4,742**

* = less than 0.5%

Table 2 shows the reasons for visiting according to the type of centre. Comparisons between centres suggest that those visiting Central London were more likely to be doing so because they work there.

[5] Although at Oxford Street those only working or living there were also in scope

Table 2: Reasons for visit by type of centre

	Central London		Inner London		Outer London	
	All purposes %	Main purpose %	All purposes %	Main purpose %	All purposes %	Main purpose %
Shopping	74	57	74	47	82	57
Eating/drinking out	22	4	22	6	21	5
Using service	7	3	22	9	20	8
Live here	1	0	17	8	13	6
Work here	18	15	12	10	11	9
Window shopping	10	4	8	1	9	1
Other social/leisure	4	1	8	3	4	2
Personal business	7	5	7	4	6	4
Visiting friends and relatives	3	2	6	2	6	3
Using public amenity	4	2	6	3	5	2
General recreation	2	1	3	1	3	1
Travelling through the area	4	2	4	1	3	1
Dropping off/picking up friend or relative	1	1	1	1	1	*
Buying petrol	*	*	*	0	1	*
Delivering goods	0	0	1	*	*	*
Other	2	2	2	2	1	1
Weighted base)	**321**	**321**	**1,904**	**1,903**	**2,521**	**2,518**

* = less than 0.5%

All reasons

The reasons for visiting were similar for all areas as shown in Appendix B. However, those visiting Camberwell and Greenwich were less likely to be there for shopping compared with other centres (60% and 66% of visitors respectively compared to between 71% and 86% for the other town centres).

Only 7% were using a service at Oxford Street/Regent Street compared to between 13% and 28% elsewhere.

A third were eating or drinking out in Greenwich as were 30% in Bromley and 29% in Croydon compared to between 14% and 23% elsewhere.

Main Reason

As regards the main reason for being in the centre the most notable variations from the average were in Woolwich where a higher proportion were shopping (65%) and in Greenwich and Camberwell where the lowest proportion were shopping (26% and 40% respectively).

At Greenwich 11% were eating/drinking out compared to between 2% and 8% elsewhere and 10% were undertaking another social/leisure activity compared to between 1% and 5% elsewhere

The main reason for visiting each centre is shown in Table 68 in Appendix B.

Comparison over time

Main changes over time are that shopping has decreased and 'work here' and 'live here' have increased.

Main reason	2011	2009	2004
Shopping	53%	58%	64%
Eating/drinking out	5%	7%	3%
Using services	8%	10%	8%
Live here	6%	2%	4%
Work here	10%	3%	7%
Personal business	4%	4%	3%
Window shopping	2%	2%	1%
Visiting friends and relatives	3%	2%	1%
Using public amenity	3%	4%	1%
Other social/leisure	2%	5%	1%

3.3 Time Spent in Town Centre

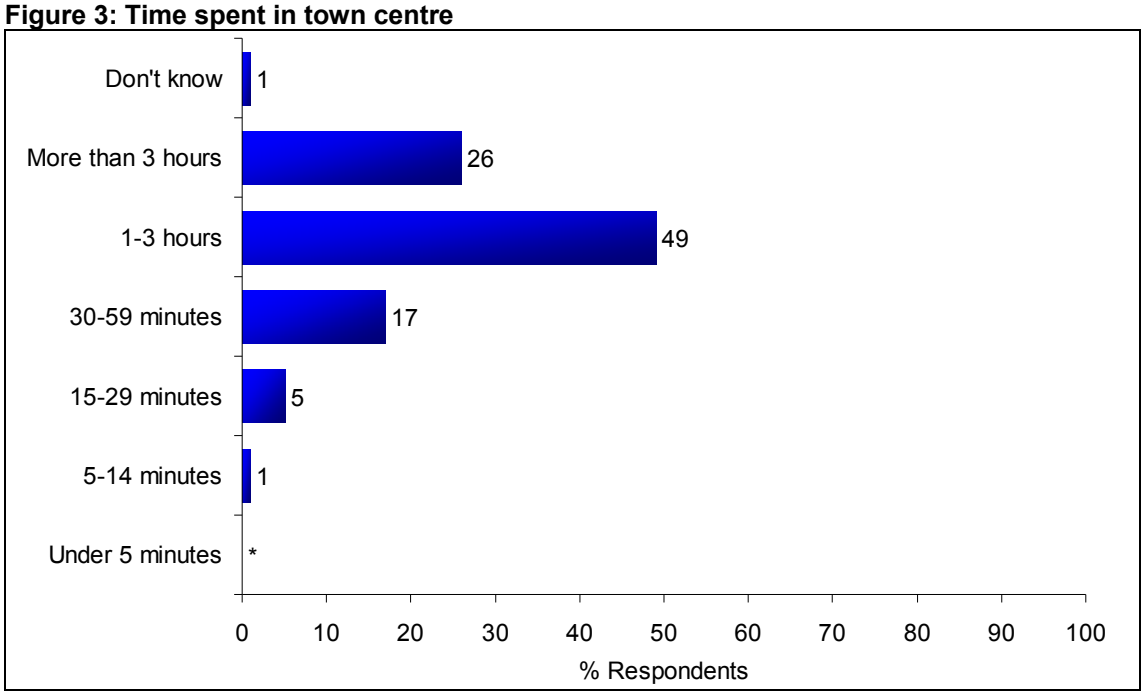
Summary

Three quarters of visitors were planning to spend at least one hour in the town centre with 49% spending between one and three hours.

Those who walked and cycled to the area tended to spend less time in the town centre. Those who travelled by train/Tube (85%), car (81%) and bus (77%) were planning to spend more than an hour in the town centre.

The majority (75%) said they were planning to spend at least one hour in the town centre with 49% spending between one and three hours.

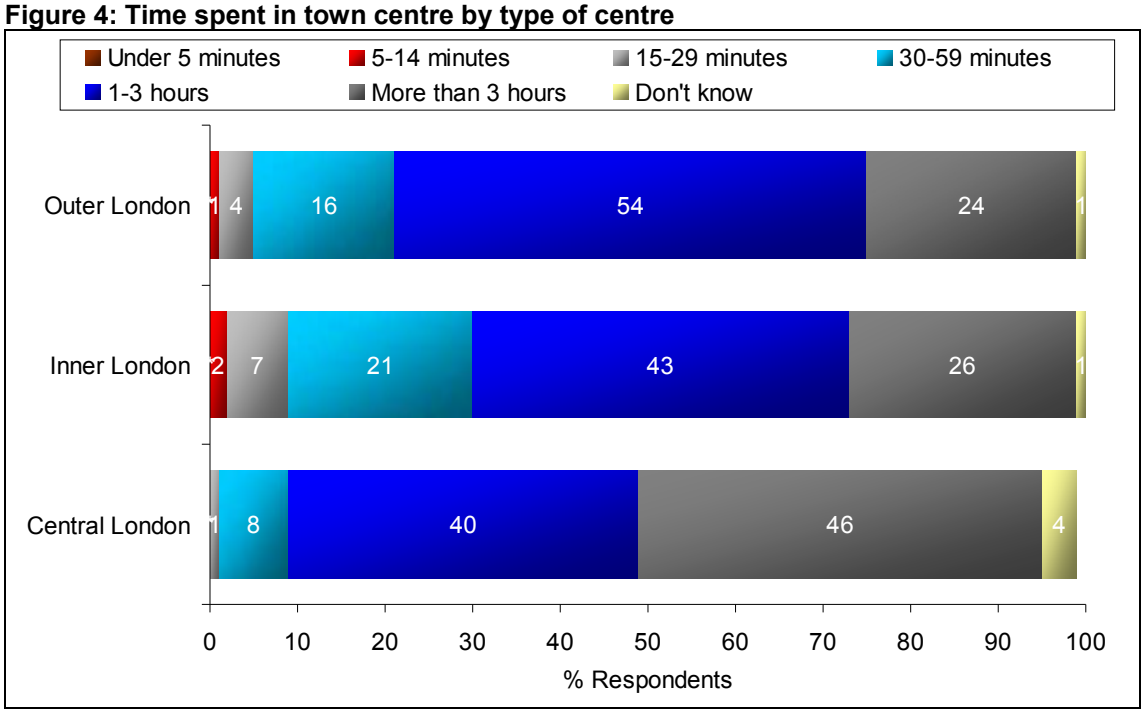
Figure 3: Time spent in town centre



Weighted base: all respondents: 4,731
* = less than 0.5%

Eighty-six per cent in Oxford Street/Regent Street spent over one hour in the town centre compared to 78% in Outer London town centres and 69% in Inner London town centres.

Figure 4: Time spent in town centre by type of centre

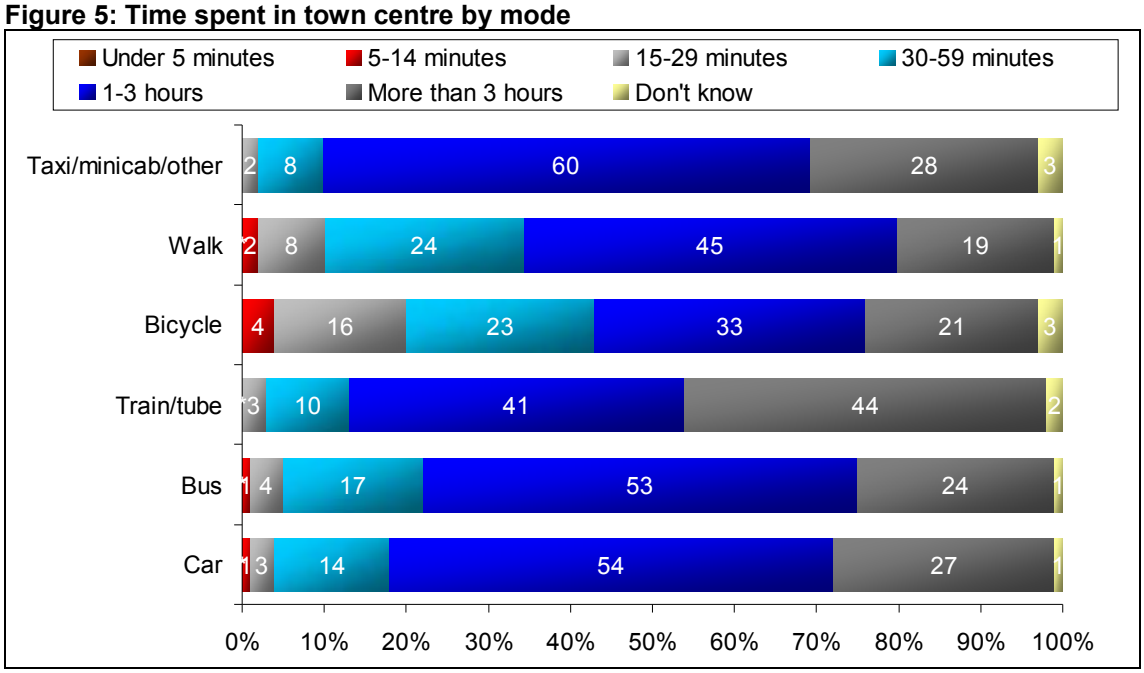


Weighted base: Central London 320; Inner London 1,899; Outer London 2,512
* = less than 0.5%

Those in the West End, Kingston, Croydon, Greenwich and Bromley were planning on spending the most time in the town centre (an average of 2.6 hours for Oxford Street/Regent Street and 2.3 hours for the other town centres). Those in Harlesden (1.6 hours), Camberwell (1.7 hours) and Hackney (1.8 hours) were making the briefest visits.

Those who walked and cycled to the area tended to spend less time in the town centre but high proportions of those who travelled by train/Tube (85%), car (81%) and bus (77%) were planning to spend more than an hour in the town centre.

Figure 5: Time spent in town centre by mode



Weighted base: car 749, bus 1,723, train/Tube 768, bicycle 110, walk 1,317, taxi/minicab/other 65

* = less than 0.5%

3.4 Frequency of Visiting

Summary

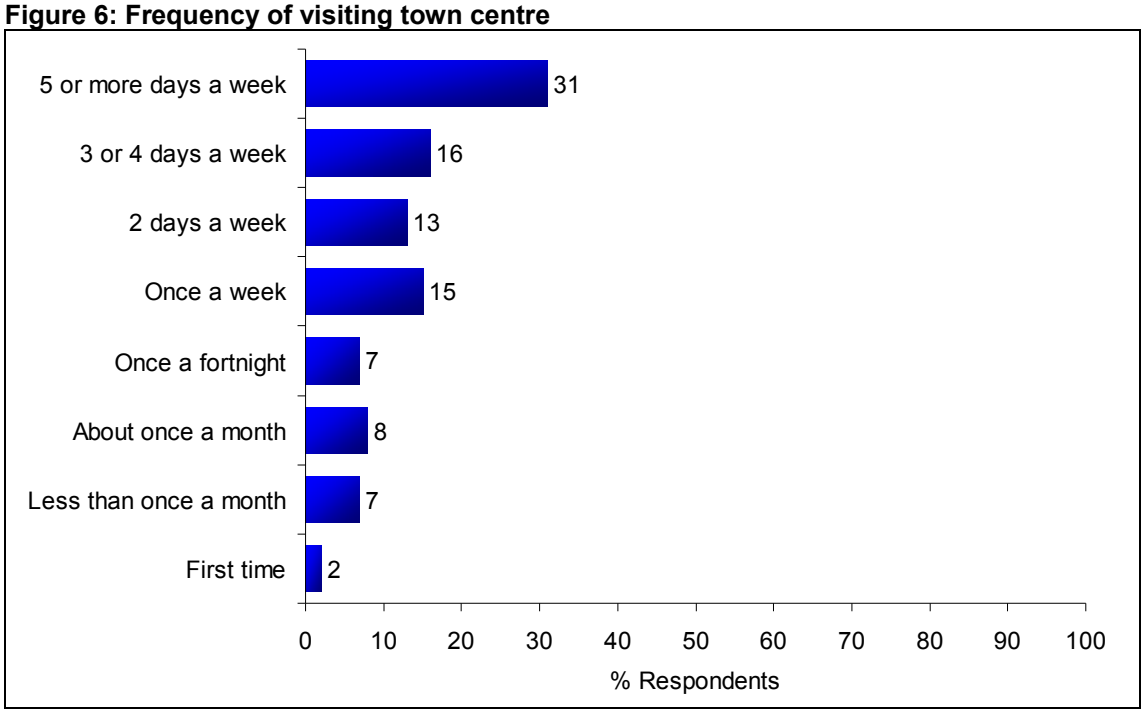
Three quarters of visitors were visiting the area once a week or more often.

The average number of visits per month was 11.

Bus users visit the centres frequently (26% visit five days a week or more often). Those who walk to the area are the most frequent visitors (51% visit five days a week or more). Cyclists are the next most frequent visitors (38% visit five days a week or more). Car users visit less often (16% visiting five days a week or more).

The majority visit the town centre on a regular basis with 75% visiting the area once a week or more often as shown in Figure 6. The exception to this is in the West End where only 45% said they visited the area once a week or more often.

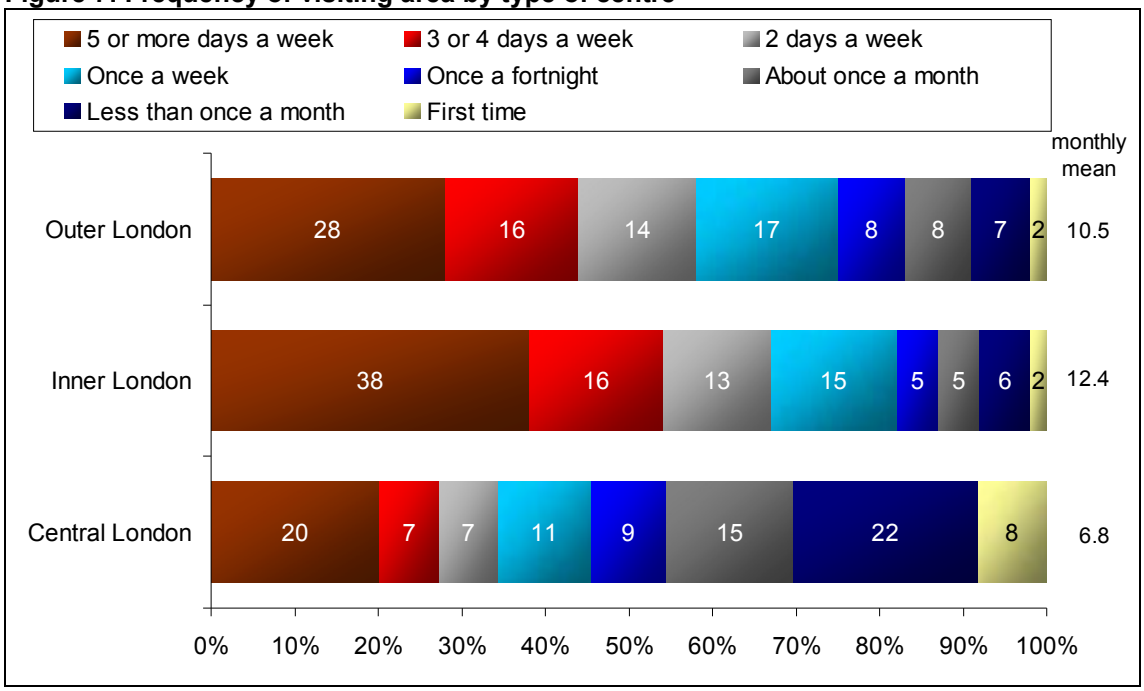
Figure 6: Frequency of visiting town centre



Weighted base: all respondents: 4,745

The average number of visits per month was 11[6]. This is the same as the average in 2009 and slightly higher than the average of 10 in 2004.

Figure 7: Frequency of visiting area by type of centre



Weighted base: Central London 321; Inner London 1,904; Outer London 2,521

Harlesden is the centre visited most frequently (92% visit once a week or more often) and Camberwell, Hackney, Clapham Junction and Ealing also have a high proportion of frequent visitors (87%, 84%, 82% and 82% respectively visit once a week or more).

[6] Details of mean score calculation are included in Appendix C

Croydon, Kingston and Bromley have a relatively low proportion of frequent visitors (67%, 66%, and 65% respectively visit once a week or more). See Table 70 in Appendix B.

Bus users visit the centres frequently (26% visit 5 days a week or more often), however, as might be expected, those who walk to the area are the most frequent visitors (51% visit five days a week or more). Cyclists are the next most frequent visitors (38% visit five days a week or more).

Car users, however, tend to visit slightly less often with 16% visiting 5 days a week or more often as shown in Table 3. Tube/train users also visit less frequently with 23% visiting 5 days a week or more often.

Table 3: Frequency of visit by mode of access

	Car %	Bus %	Train/Tube %	Bicycle %	Walk %	Taxi/mini-cab/ other %
5 or more days a week	16	26	23	38	51	27
3 or 4 days a week	11	16	13	17	19	18
2 days a week	15	16	8	13	11	5
Once a week	18	19	11	14	11	21
Once a fortnight	13	8	8	4	3	5
About once a month	14	7	12	4	2	10
Less than once a month	11	6	16	8	1	13
First time	2	1	8	2	1	1
Weighted base	**751**	**1728**	**769**	**111**	**1321**	**65**

Frequency of visit by town centre categories used in the London Plan is shown in Table 4. This shows that the highest frequency of visit is from visitors to District town centres and the lowest frequency of visit is from visitors to International town centres.

Table 4: Frequency of visit by London Plan town centre category

	International %	Metropolitan %	Major %	District %
5 or more days a week	20	26	33	41
3 or 4 days a week	7	15	17	18
2 days a week	7	13	14	14
Once a week	11	17	17	12
Once a fortnight	9	9	7	5
About once a month	15	9	6	4
Less than once a month	22	8	5	5
First time	8	2	1	2
Monthly mean	**6.8**	**9.9**	**11.6**	**13.2**
Weighted base	**321**	**1905**	**1258**	**1262**

Comparison over time

Little change in frequency of visit over time.

	2011	2009	2004
Once a week or more	75%	73%	73%
Once a fortnight	7%	8%	7%
Once a month	8%	8%	9%
Less often	9%	9%	11%

3.5 Mode of Transport

Summary

Over a third (36%) use bus to access the town centre, 28% walk, 17% use train/Tube, 14% use car and 2% cycle.

Over half (52%) use Tube or train to go to Central London (4-5% elsewhere). 19% use car in Outer London town centres compared to 8% in Inner London and 2% in Central London.

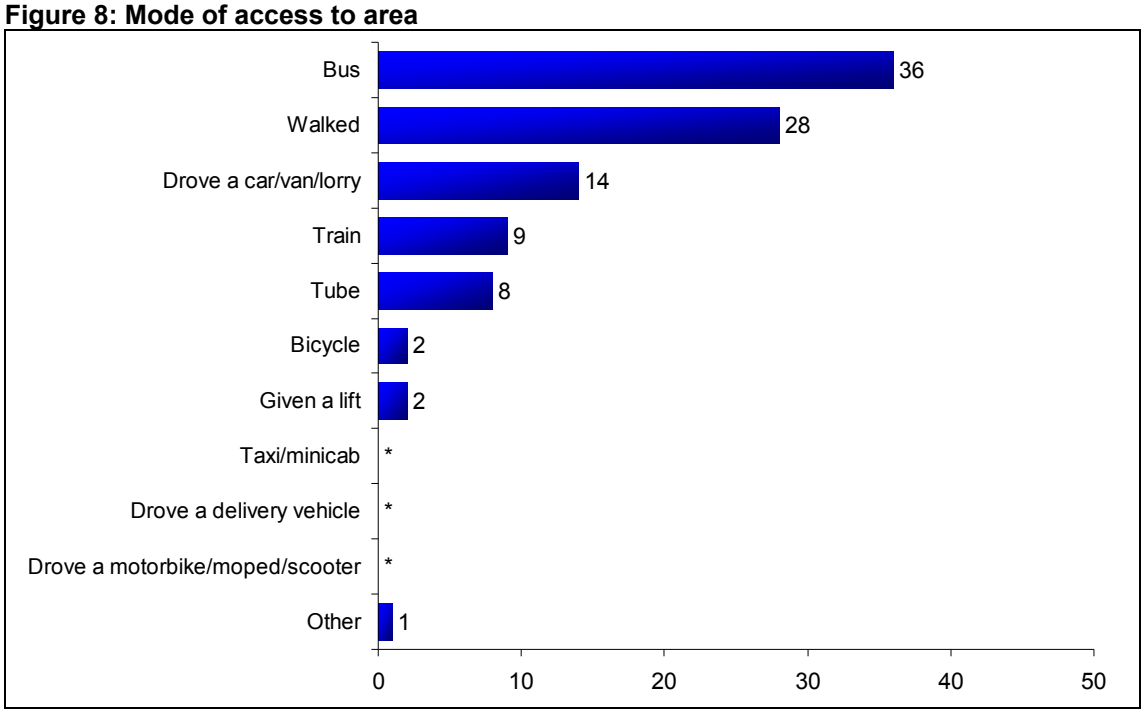
The main reason for using each mode is: **car:** quicker (32%), **bus:** cheaper (22%), **train/Tube:** quicker (48%), **cycle:** need/enjoy the exercise (33%) and **walk:** live very close by (30%).

Walking was the most frequently used mode. The weekly mean frequency for the different modes was: car 1.7, bus 2.7, train/Tube 2.1, bicycle 3.1 and walk 3.8.

Car drivers were satisfied with the ease of access to town centre by car and the number of parking spaces provided (mean scores of 7.1 and 6.5 respectively on a scale from 0, very dissatisfied to 10, very satisfied).

Bus was the mode of access used by the highest proportion of visitors (36%). Twenty eight per cent walked to the town centre, and 14% used a car/van/lorry as shown in Figure 8.

Figure 8: Mode of access to area



Weighted base: all respondents: 4,745
* = less than 0.5%

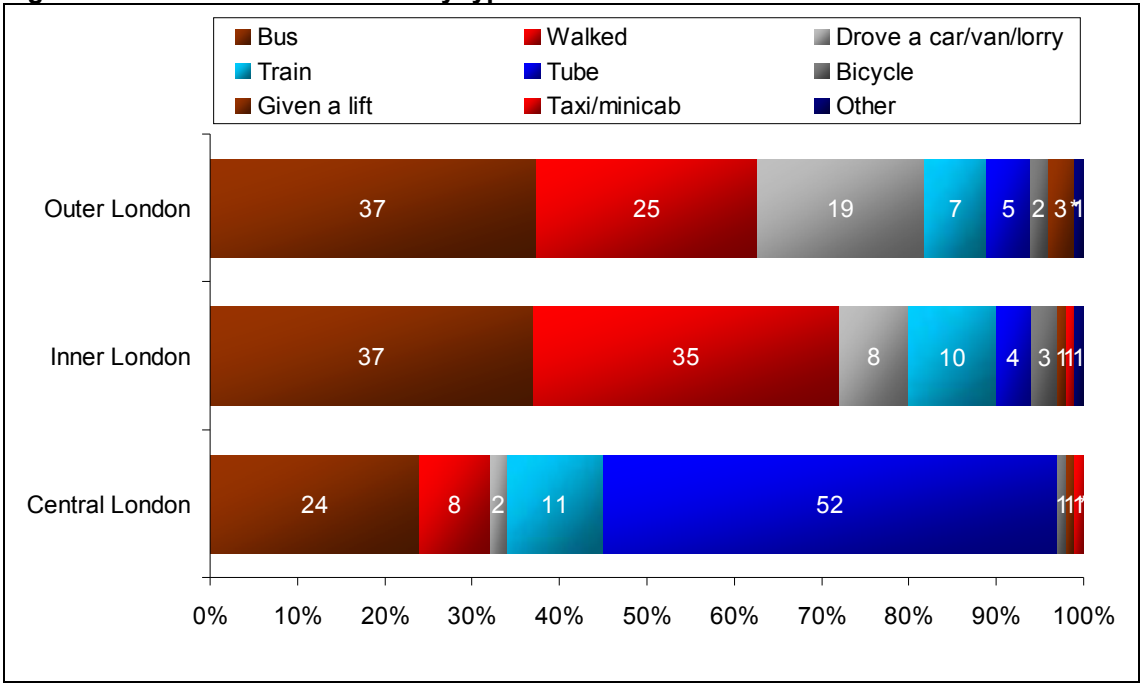
Almost three quarters (74%[7]) of those who lived within a ten minute walk of the town centre walked there.

Table 5: Mode of access to area by whether live or work within 10 minutes walk of centre

	Live %	Work %	Both %	Neither %
Drove a car/van/lorry	4	15	7	18
Drove a motorbike/moped/scooter	*	0	1	*
Drove a delivery vehicle	0	*	0	*
Given a lift	*	2	0	2
Bus	14	39	22	45
Tube	1	14	1	10
Train	2	16	4	10
Bicycle	2	2	2	3
Walked	75	12	63	10
Taxi/minicab	*	*	0	1
Other	1	*	1	1
Weighted base	**1121**	**443**	**176**	**3003**

Figure 9 shows that the most popular means of transport used to reach Central London was the Tube (52%). Almost a fifth (19%) drove to the Outer London town centres compared to 8% for Inner London and just 1% for Central London. Over a third (35%) walked to the town centre in Inner London compared to a quarter in Outer London and 8% in Central London.

Figure 9: Mode of access to area by type of centre



Weighted base: Central London 321; Inner London 1,904; Outer London 2,521
* = less than 0.5%

Walking was the predominant means of accessing the town centre in Harlesden (45%), Camberwell (42%), Clapham Junction (37%) and Greenwich (34%). Tube was the predominant means of accessing Oxford Street/Regent Street (52%). At all other centres bus was the predominant means of access.

[7] Weighted average of 75% who live within 10 minutes walk and 63% who live and work within 10 minutes walk

Bus use was particularly high in Bexleyheath (52%) and lowest in Oxford Street/Regent Street (24%). Bus use in Oxford Street/Regent Street was also 24% in 2009 and 2004.

Tube use was particularly high in Oxford Street/Regent Street (52%) and there is no Tube service in Bexleyheath, Bromley and Croydon.

Car use was highest in Bromley (29%) and Harrow (27%) and very low in Oxford Street/Regent Street (2%), Clapham Junction (4%) and Camberwell (5%).

Train use was highest in Croydon (19%), non existent in Bexleyheath, and very low in Camberwell (3%), Wood Green (3%), Harlesden (4%) and Harrow (4%).

Walking as an access mode was highest at Harlesden (45%) and Camberwell (42%) and lowest at Oxford Street/Regent Street (8%) and Bromley (15%).

In Croydon, 6% mentioned tram.

See Table 69 in Appendix B for a full breakdown.

Comparison over time

There has been a steady decrease in car use over time. The largest change since 2009 is an increase in walking.

	2011	2009	2004
Bus	36%	38%	34%
Walk	28%	25%	29%
Car	14%	16%	20%
Train/Tube	17%	17%	14%
Bicycle	2%	2%	1%

Characteristics of users of different modes

Bus users were more likely to be female, not working, retired, non White and have lower household incomes than other mode users.

Car users were more likely to be older, working and have higher household incomes than other mode users.

Train and Tube users were more likely to be younger and non White than other mode users.

Cyclists were more likely to be male and White than other mode users. See Table 6.

Table 6: Profile of mode users

	Car %	Bus %	Train/ Tube %	Bicycle %	Walk %
Age					
16-34	21	33	43	31	37
35-44	38	29	30	37	29
45-59	28	18	18	24	20
60+	13	20	9	9	14
Gender					
Male	39	35	44	63	41
Female	61	65	56	37	59
Employment status					
Working	73	54	69	71	57
Student	5	9	17	9	10
Not working	9	17	6	15	19
Retired	13	20	8	5	15
Ethnic group					
White	77	68	68	82	74
Asian	7	6	9	1	5
Black	11	21	17	11	14
Mixed/Other	5	6	6	6	7
Household income*					
Under £20,000	14	46	21	34	35
£20,000-£34,999	26	27	24	18	26
£35,000-£74,999	44	22	41	37	29
£75,000 or over	16	5	15	11	10
Weighted base	**750**	**1722**	**768**	**110**	**1318**

* after excluding don't knows and refuseds

Why Modes used

The reasons for choosing to travel by the particular mode used to access the area are shown in Table 7. Train/Tube in particular were considered to be quicker (64%), as were car (56%) and bicycle (51%). Each of these modes was also considered to be easier/more convenient than other modes.

Train/Tube were also considered to be more direct (39%).

A high proportion travelled by bus because it was cheaper (35%), with 15% saying it was the only mode available[8].

Over a third of those who walked (37%) said they lived close by and 26% said they need/enjoy the exercise.

Over half of those who cycled (55%) cited low cost and (52%) said they need/enjoy the exercise.

[8] Particularly those in Bexleyheath (30%), Croydon (26%) and Bromley (25%).

Table 7: Reasons for using chosen method of transport rather than any other method of transport to access area by mode

	Car %	Bus %	Train/ Tube %	Bicycle %	Walk %
Quicker	56	31	64	51	36
Cheaper/less expensive	13	35	11	55	24
More direct	30	24	39	25	16
Easier/more convenient	34	24	25	27	13
Live very close by	1	5	2	15	37
More relaxing/comfortable	15	8	8	21	8
Only method possible	5	15	9	1	3
Need/enjoy exercise/healthy	*	2	*	52	26
No car/can't drive	*	16	6	7	3
Avoids parking difficulties	1	11	8	16	4
Going to more than one place	15	4	2	11	4
Safer	8	6	6	3	2
Had heavy bags/shopping to carry	14	3	1	3	1
Weather issues	4	2	1	4	9
Travelling with children	6	2	1	1	2
Avoid the congestion charge	*	2	2	2	1
Weighted base	**751**	**1727**	**769**	**111**	**1320**

Note: More than one answer may be given, so percentages may add up to more than 100%
* = less than 0.5%

The **main** reasons for choosing to travel by the particular mode used to access the area are shown in Table 8. The main reasons for each mode are:

- **car:** quicker (32%)
- **bus:** cheaper (22%)
- **train/Tube:** quicker (48%)
- **cycle:** need/enjoy the exercise (33%)
- **walk:** live very close by (30%).

Table 8: Main reason for using chosen method of transport rather than any other method of transport to access area

	Car %	Bus %	Train/ Tube %	Bicycle %	Walk %
Quicker	32	17	48	23	18
Cheaper/less expensive	6	22	4	20	11
More direct	10	13	19	2	5
Easier/more convenient	20	12	11	10	5
Live very close by	1	2	1	2	30
Only method possible	4	12	6	1	2
Need/enjoy exercise/healthy	*	1	*	33	17
No car/can't drive	*	9	2	0	1
More relaxing/comfortable	5	3	2	6	3
Avoids parking difficulties	*	5	3	2	1
Going to more than one place	9	2	1	1	2
Had heavy bags/shopping to carry	7	1	*	0	*
Travelling with children	4	1	1	0	1
Safer	1	1	1	0	*
Weather issues	1	1	*	0	4
Avoid the congestion charge	0	*	*	0	*
Weighted base	**751**	**1727**	**769**	**111**	**1320**

* = less than 0.5%

Other modes of transport sometimes used

Buses were the most used 'other' mode. Nearly three quarters of walkers (74%) sometimes used the bus and more than half train/Tube (61%), bicycle (59%) and car (58%) users also sometimes used buses to travel to the town centres. This represents a large increase in bus use by users of other modes compared to the 2004 study where 48% of walkers 40% of train/Tube, 51% of bicycle and 34% of car users also sometimes used buses to travel to the town centres.

Nearly a third (31%) of bus users sometimes used a car to the town centre and 26% sometimes used the train.

Nearly a third (31%) of bus and bicycle users also sometimes walk to the town centres.

Table 9: Other modes used to town centre, by mode used:

	Total %	Car %	Bus %	Train/ Tube %	Bicycle %	Walk %	Taxi/ minicab/ other %
Car/van/lorry	20	6	31	20	20	15	11
Motorbike/moped/scooter	1	1	*	1	2	1	0
Bus	44	58		61	59	74	71
Tube	11	8	15	9	5	9	10
Train	15	15	26	8	8	7	14
Bicycle	5	2	4	2	0	9	5
Barclays Cycle Hire	*	0	*	*	0	0	0
Walked	17	19	31	11	31		10
Taxi/minicab	5	5	6	7	2	2	0
Other	1	*	1	1	0	2	0
Weighted base	**2967**	**431**	**1013**	**524**	**82**	**881**	**36**

* = less than 0.5%

Frequency of mode use

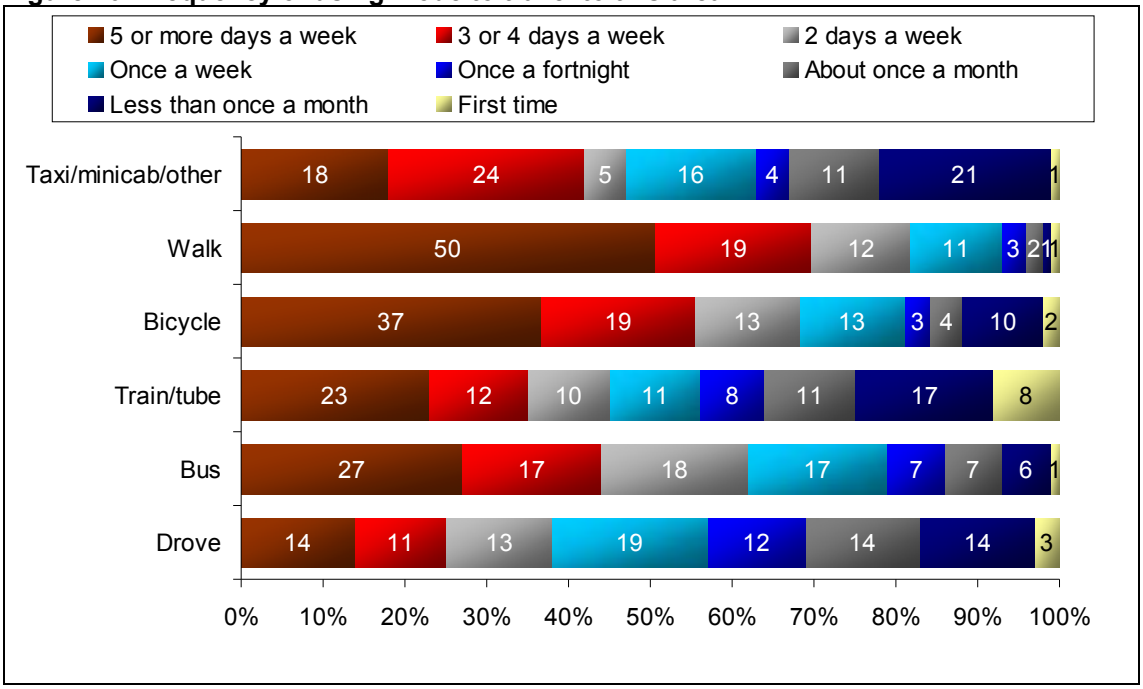
Half of those who walked to the town centre walked there five or more days a week. Cyclists were also very frequent users of the mode to the town centre with 37% who cycled to the town centre cycling there five or more days a week.

Of the other modes, bus was the most frequently used (27% five or more days a week) and car the least frequently used (14% five or more days a week).

The weekly mean frequency for the different modes was:

- car 1.7
- bus 2.7
- train/Tube 2.1
- bicycle 3.1
- walk 3.8.

Figure 10: Frequency of using mode to travel to this area



Weighted base: car 751, bus 1,726, train/Tube 767, bicycle 111, walk 1,309, taxi/minicab/other 64

Parking

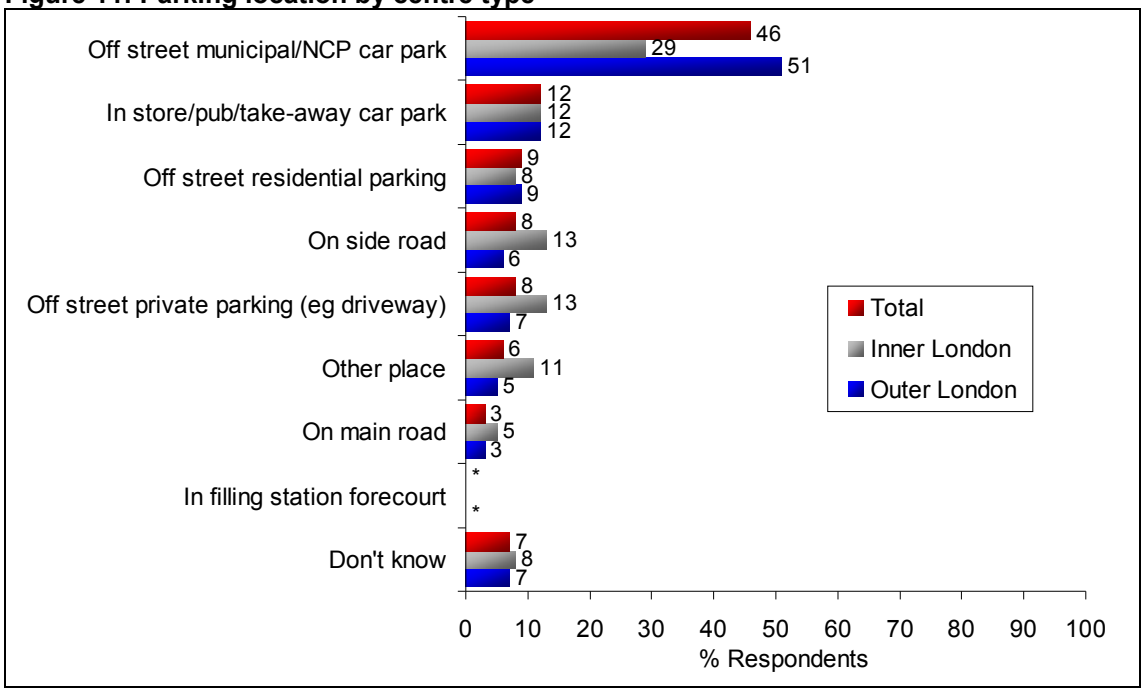
Those who had driven to the centre (721 people) were asked about parking in the area and ease of access to the area by car.

Almost half (46%) had parked in an off-street municipal/NCP car park. Twelve per cent parked in a store/pub/take-away car park.

Visitors to Outer London town centres were significantly more likely to park in an off street municipal or NCP car park than visitors to Inner London town centres.

Visitors to other Inner London centres were more likely to park on a main road, side road or off street.

Figure 11: Parking location by centre type[9]



Weighted base: 721 who had driven to area; 167 Inner London, 545 Outer London

Car users to Croydon, Harrow, Ealing and Bromley were most likely to have used a municipal/NCP car park (73%, 62%, 60% and 60% respectively).

Car users to Harlesden and Camberwell were most likely to park on the main road and side road (62% and 45% respectively).

Car users to Camberwell were most likely to park in a store/pub/take-away car park (20%).

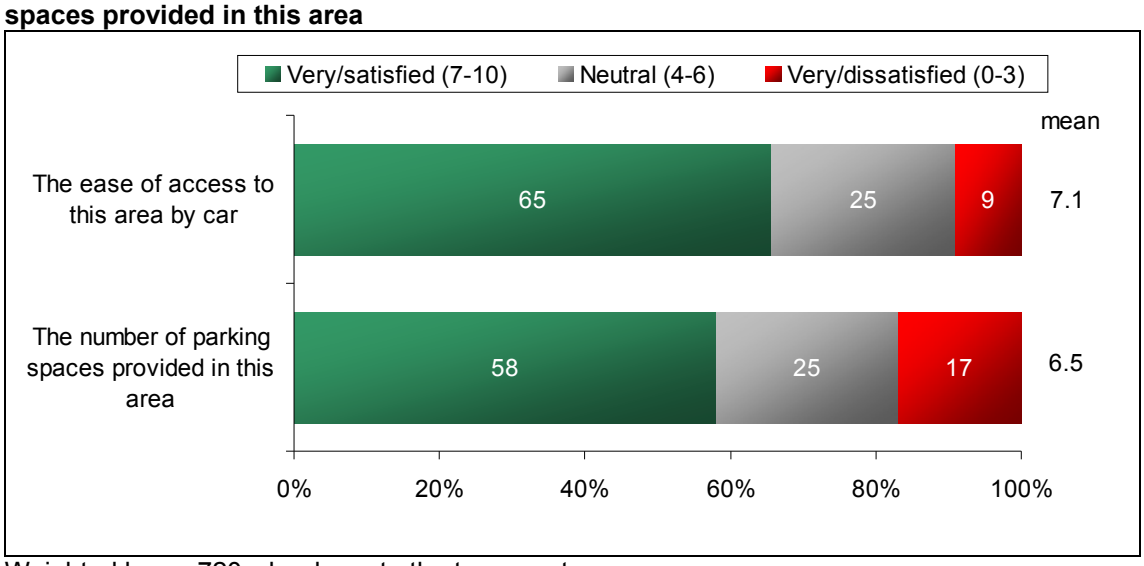
Car users to Wood Green and Ealing were most likely to park in off street residential parking (62% and 45% respectively).

Car users' satisfaction with parking

A majority of car drivers were satisfied with the ease of access to town centre by car and the number of parking spaces provided (mean scores of 7.1 and 6.5 respectively on a scale from 0, very dissatisfied to 10, very satisfied) as shown in Figure 12.

[9] Only 9 parked in Central London (4 in off street municipal/NCP car park, 3 on side road and 2 didn't know) so this data not shown

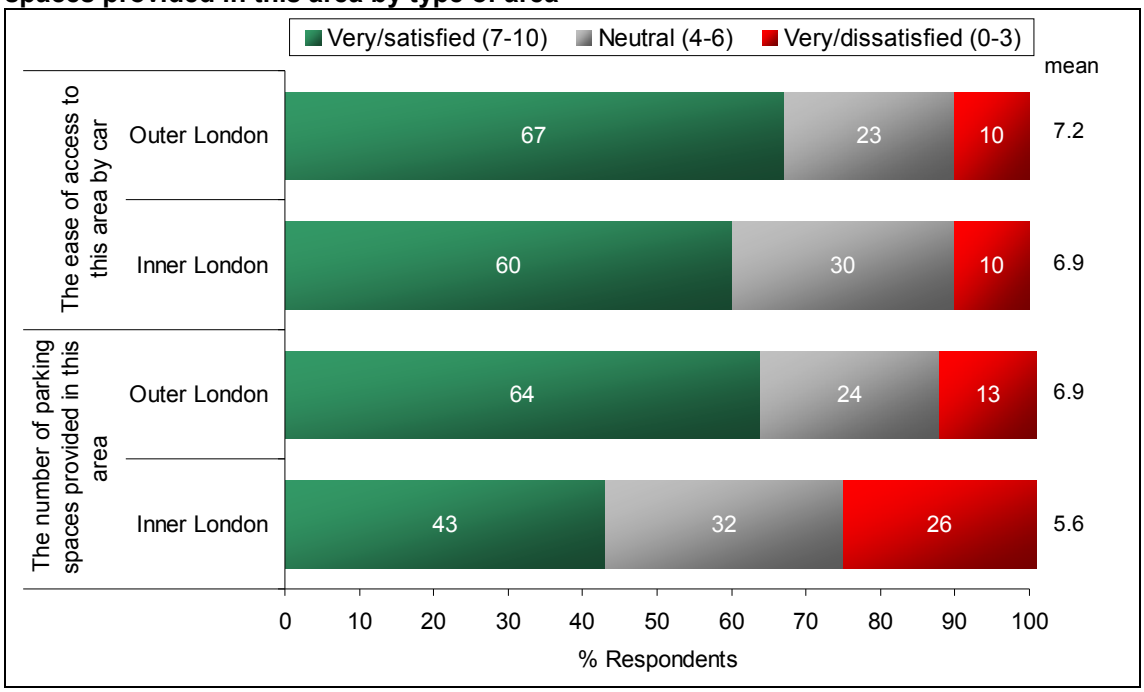
Figure 12: Satisfaction with ease of access to the area by car and number of parking spaces provided in this area



Weighted base: 720 who drove to the town centre

Car drivers to Outer London town centres were more satisfied with both the ease of access to their area by car and the number of parking spaces than were visitors to Inner London town centres.

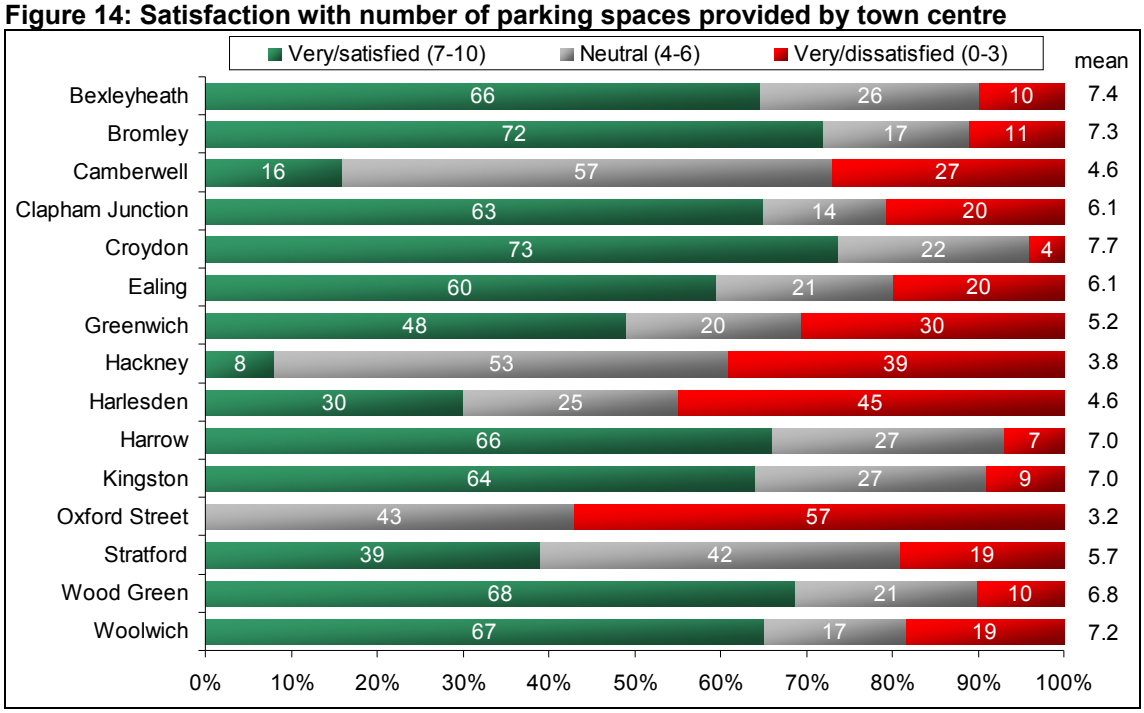
Figure 13: Satisfaction with ease of access to the area by car and number of parking spaces provided in this area by type of area



Weighted base: those who had driven to area: Inner London 167, Outer London 545

The least satisfied with the number of parking spaces were drivers at Oxford Street/Regent Street (mean score 3.2) and Hackney (3.8) and the most satisfied with the number of parking spaces were drivers at Croydon (mean score 7.7) and Bexleyheath (7.4).

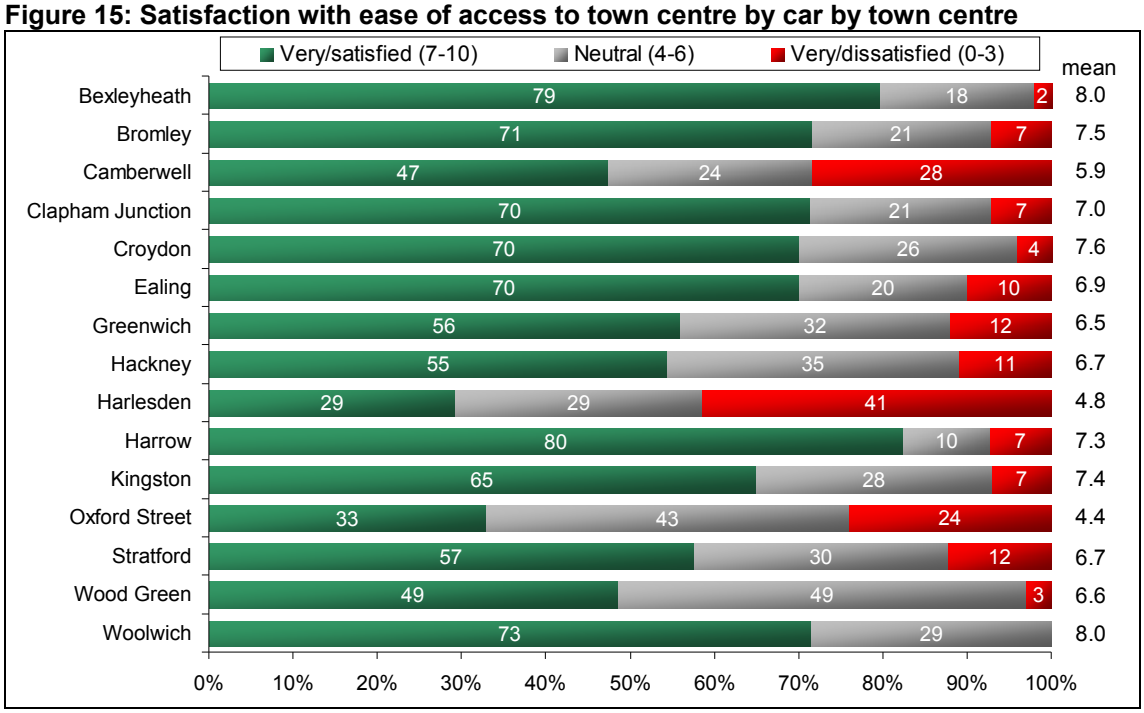
Figure 14: Satisfaction with number of parking spaces provided by town centre



Weighted base: Bexleyheath 89, Bromley 127, Camberwell 19, Clapham Junction 14, Croydon 44, Ealing 39, Greenwich 42, Hackney 26, Harlesden 49, Harrow 79, Kingston 89, Oxford Street/Regent Street 9, Stratford 26, Wood Green 30, Woolwich 40

The least satisfied with the ease of access to the town centre were drivers at Oxford Street/Regent Street (mean score 4.4) and Harlesden (4.8) and the most satisfied with ease of access to the town centre were drivers at Woolwich and Bexleyheath (mean score 8.0).

Figure 15: Satisfaction with ease of access to town centre by car by town centre



Weighted base: Bexleyheath 89, Bromley 127, Camberwell 19, Clapham Junction 14, Croydon 44, Ealing 39, Greenwich 42, Hackney 26, Harlesden 49, Harrow 79, Kingston 89, Oxford Street/Regent Street 9, Stratford 26, Wood Green 30, Woolwich 40

3.6 Attitudes to and Use of Bus

Summary

Over three quarters sometimes use the bus to travel in the area of the town centre.

Bus use increased slightly compared to twelve months ago. There was a 3% increase in those that travel by bus at least once a week (from 49% to 52%), and a 3% increase in those using buses at all (from 73% to 76%).

Bus customers were most positive about the ease of getting on and off the bus (mean score 7.9[10]) and the convenience of bus stops (7.7). Bus users were least satisfied with the level of crowding on the bus (6.8) and value for money (6.9).

There was strong agreement that there should be stricter bus lane enforcement (mean score 7.8), that bus stops are conveniently located (7.6) and for goods vehicles not to be allowed in bus lanes (6.9).

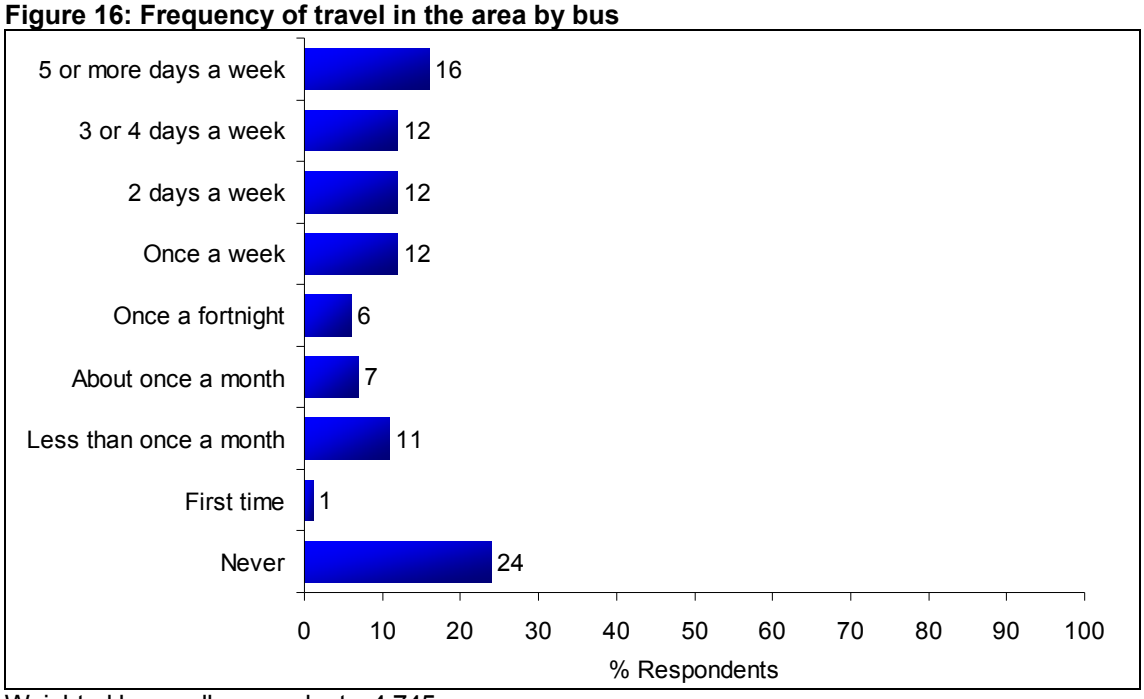
The top three single factors that would encourage greater use of the bus were lower fares (12%), more regular buses (9%) and direct bus routes (7%).

Frequency buses used to travel in town centre

Over three quarters (76%) sometimes used the bus to travel in the area of the town centre, even if they did not do so on the day of interview.

Over half (52%) had used bus in the area at least once a week. Just under a quarter (24%) said they never used the bus in the area.

Figure 16: Frequency of travel in the area by bus

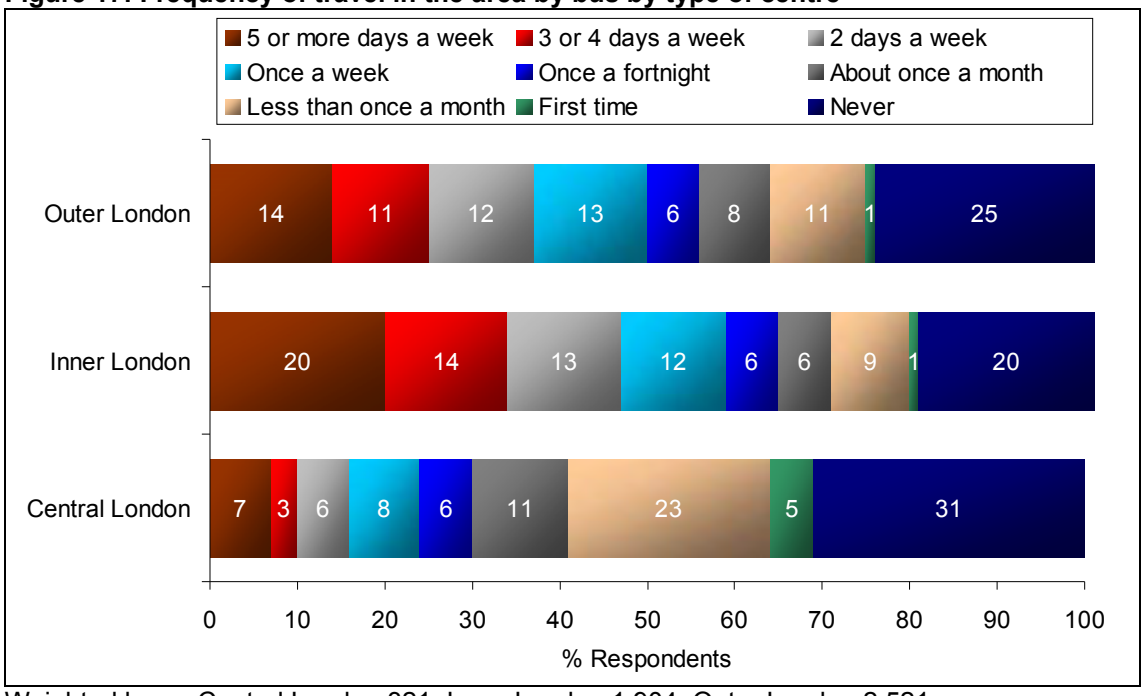


Weighted base: all respondents: 4,745

[10] where 0 = very dissatisfied and 10 = very satisfied

Frequency of using the bus was significantly different by type of town centre. Bus use was highest and most frequent in Inner London town centres: four out of five sometimes used the bus and 59% used the bus at least once a week. Bus use was lowest and least frequent to Oxford Street/Regent Street (69% sometimes used the bus, 24% used the bus at least once a week).

Figure 17: Frequency of travel in the area by bus by type of centre

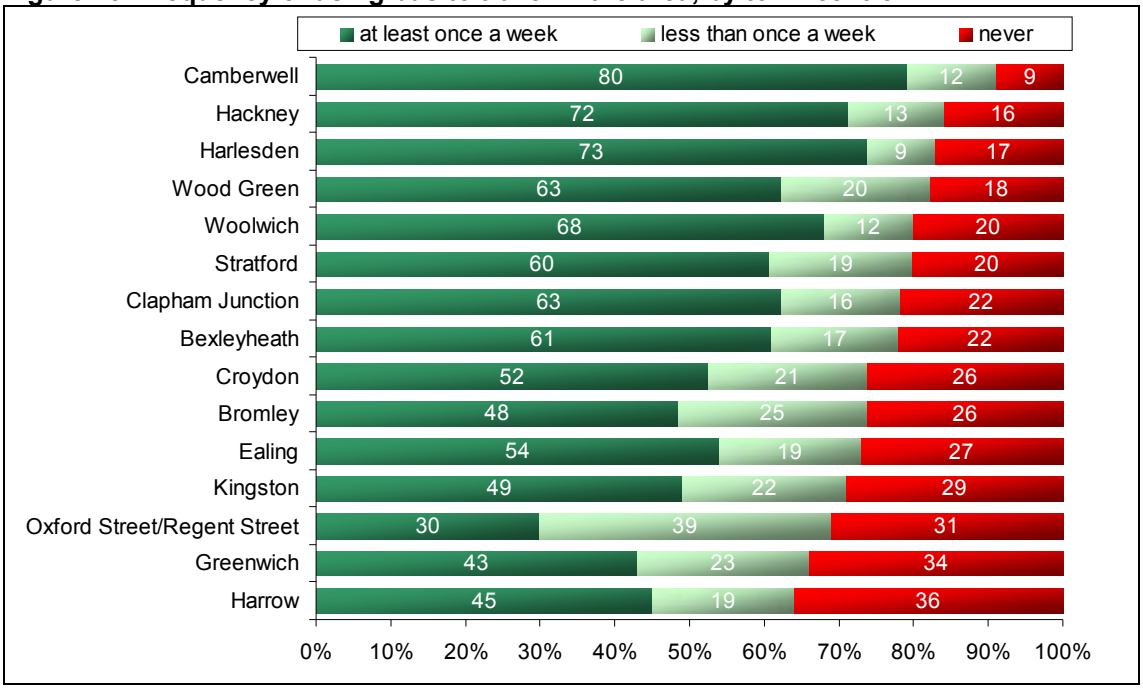


Weighted base: Central London 321; Inner London 1,904; Outer London 2,521

Bus use was highest in Camberwell with 92% sometimes using the bus to travel in the area. Bus use was also very high in Hackney, Harlesden, Wood Green, Woolwich and Stratford (from 84% to 80%).

Bus use was lowest in Harrow, Greenwich and Oxford Street/Regent Street (from 64% to 69%).

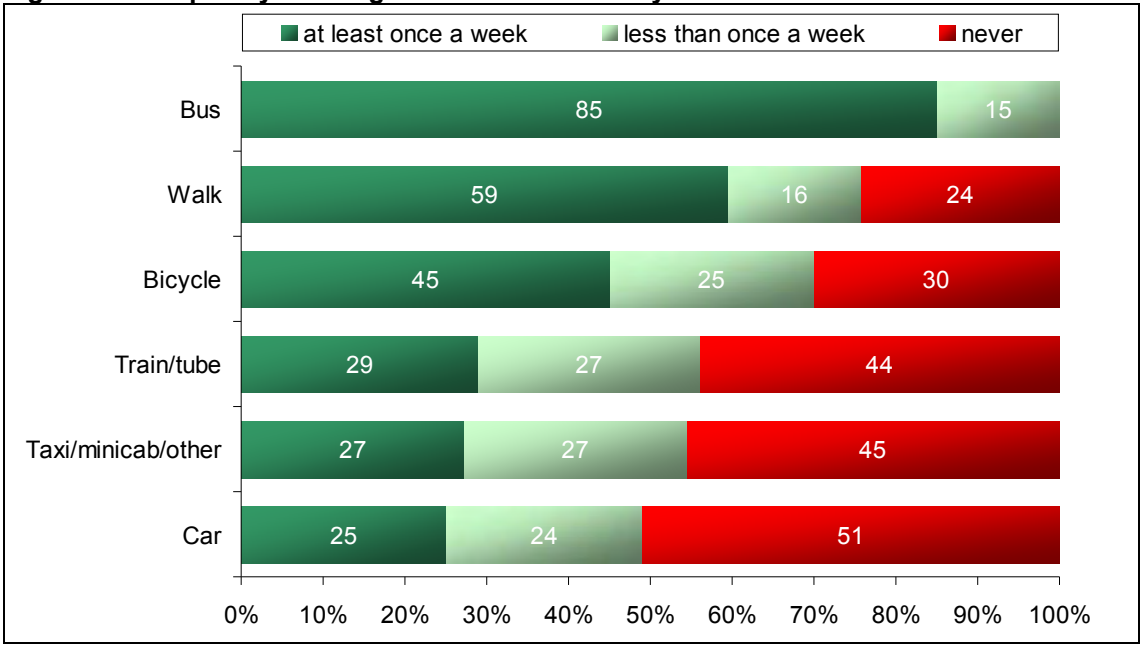
Figure 18: Frequency of using bus to travel in the area, by town centre



Weighted base: Bexleyheath 313, Bromley 363, Camberwell 316, Clapham Junction 330, Croydon 298, Ealing 299, Greenwich 325, Hackney 318, Harlesden 303, Harrow 295, Kingston 319, Oxford Street/Regent Street 321, Stratford 312, Wood Green 331, Woolwich 301

Those who travelled to the town centre by bus on the day of interview were the most frequent users of bus overall: 85% used bus at least once a week. Six in ten walkers (59%) also used the bus at least once a week. Car users were least likely to use the bus, but a quarter did so at least once a week.

Figure 19: Frequency of using bus in town centre by mode used

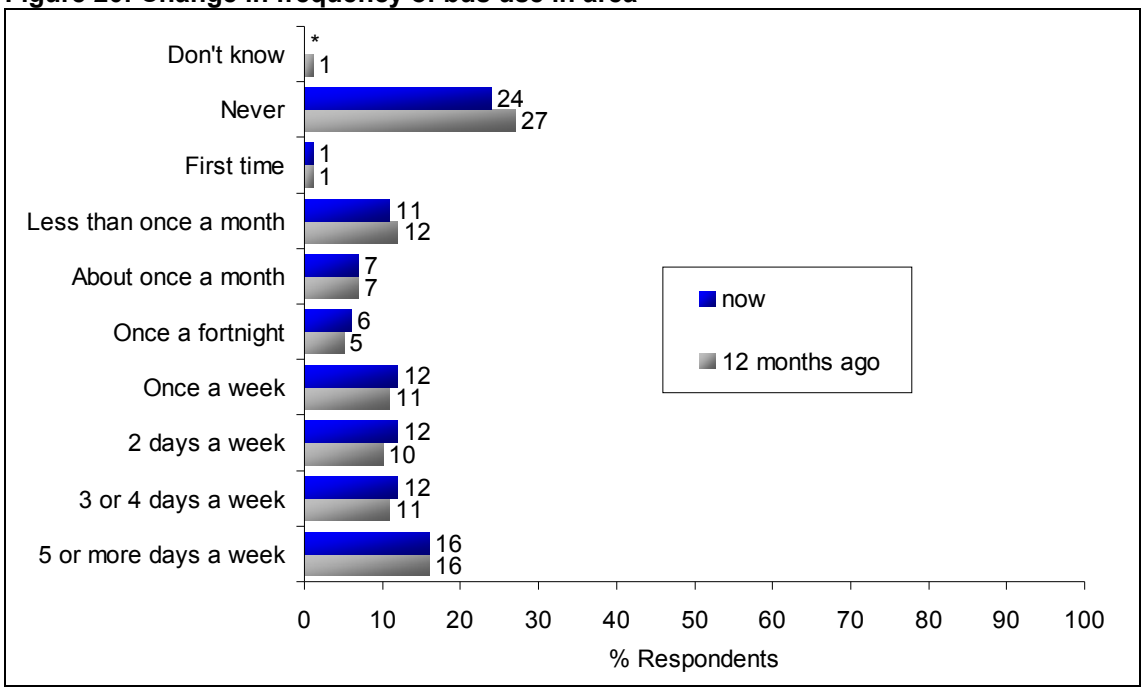


Weighted base: car 751, bus 1,726, train/Tube 769, bicycle 111, walk 1,321, taxi/minicab/other 65

Bus use increased slightly compared to the claimed frequency of use of twelve months ago as shown in Figure 20. There was a 4% increase in those that travel by bus at least

once a week (from 48% to 52%), and a 3% increase in those using buses at all (from 73% to 76%).

Figure 20: Change in frequency of bus use in area



Weighted base: all respondents: 4,745
* = less than 0.5%

The increase in bus use occurred in all types of centre as can be seen from the weekly and monthly mean usage figures below:

	Total	Central London	Inner London	Outer London
• Weekly use				
– Current	1.7	0.8	2.0	1.6
– 12 months ago	1.6	0.7	2.0	1.5
• Monthly use				
– Current	6.9	3.1	8.1	6.4
– 12 months ago	6.5	2.6	7.8	6.1

Bus users' satisfaction

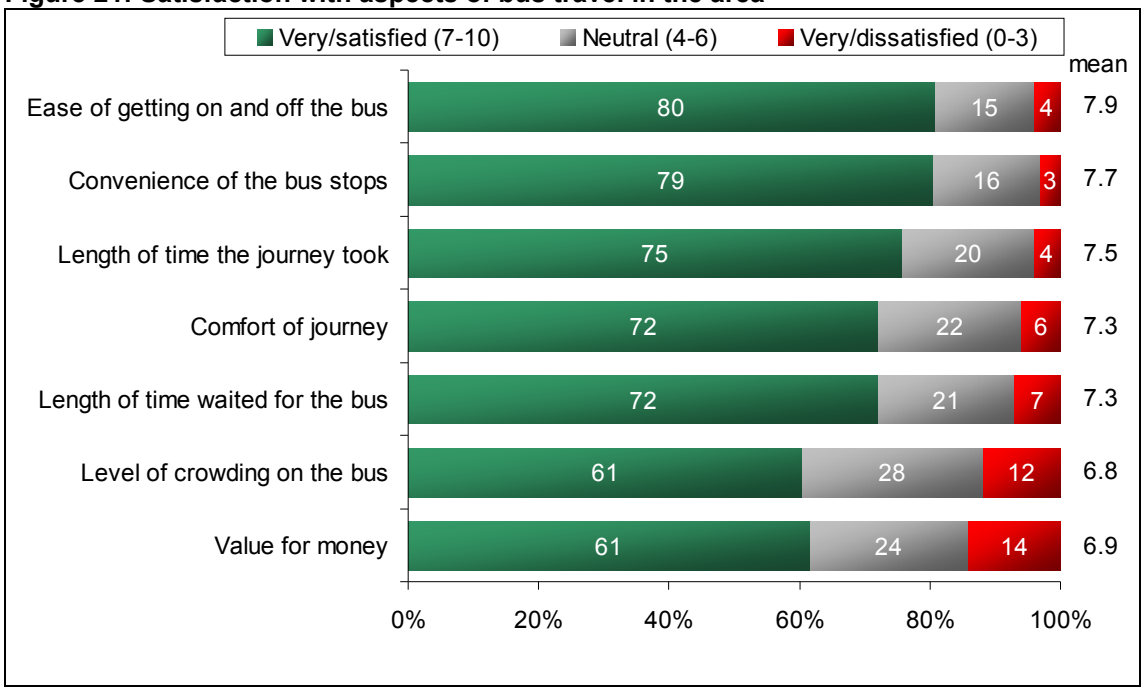
Those who travelled to the area by bus on the day of interview were asked about their satisfaction with the following seven aspects of the bus journey:

- Length of time waited for the bus
- Comfort of journey
- Value for money
- Ease of getting on and off the bus
- Level of crowding on the bus
- Length of time the journey took
- Convenience of the bus stops.

See Figure 21 for the results for the overall bus user sample.

Although generally positive about all the different aspects of travel by bus in the area, bus users were least satisfied with the level of crowding on the bus (mean score 6.8 on a scale of 0 to 10 were 0 = very dissatisfied and 10 = very satisfied) and the value for money (mean score of 6.9). Bus customers were most positive about the ease of getting on and off the bus (mean score 7.9) and the convenience of bus stops also scored highly (mean score 7.7).

Figure 21: Satisfaction with aspects of bus travel in the area



Base: 1,724 who travelled by bus

Bus users in Kingston and Greenwich were generally most satisfied with bus services.

Bus users in Kingston gave the highest scores for four aspects:

- Length of time waited for the bus (8.13)
- Ease of getting on and off the bus (8.63)
- Level of crowding on the bus (7.26)
- Convenience of the bus stops (8.65)

Bus users in Greenwich gave the highest score for 'value for money' (8.07) and second highest score for four other aspects.

Bus users in Croydon, Clapham Junction and Bexleyheath also gave high ratings for bus services.

Those in Harlesden were least satisfied, in particular with the 'length of time waited for the bus' (mean score 6.49), 'length of time the journey took' (6.87) and 'convenience of the bus stops' (7.3).

Those in Camberwell, Hackney and Stratford also gave low scores.

Analysis by type of town centre shows that those in Outer London town centres have higher satisfaction scores for all aspects except 'value for money' and that those in Central London have lower satisfaction scores for all aspects except 'length of time waited for the bus' and 'value for money'.

Table 10: Summary of means scores for aspects of travel by bus in area by town centre

	Total	Central London	Inner London	Outer London
Length of time waited for the bus	7.34	7.24	7.17	7.43
Comfort of journey	7.33	7.20	7.26	7.36
Value for money	6.90	7.07	6.87	7.06
Ease of getting on and off the bus	7.85	7.94	7.94	7.96
Level of crowding on the bus	6.78	6.35	6.65	6.82
Length of time the journey took	7.45	7.20	7.48	7.52
Convenience of the bus stops	7.72	7.55	7.82	7.92

Mean scores calculated on a scale from 0 very dissatisfied to 10 very satisfied
1. except refused and don't know

Comparison over time

Key change is 'value for money' for bus travel has gone down over time.

	2011	2009	2004
Ease of getting on and off the bus	7.9	7.9	7.9
Convenience of the bus stops	7.7	7.8	7.8
Length of time the journey took	7.5	7.4	7.2
Length of time waited for the bus	7.3	7.4	6.7
Comfort of journey	7.3	7.3	7.0
Value for money	6.9	7.3	7.4
Level of crowding on the bus	6.8	6.8	6.6

Attitudes towards Bus Lanes and Bus Priority Measures

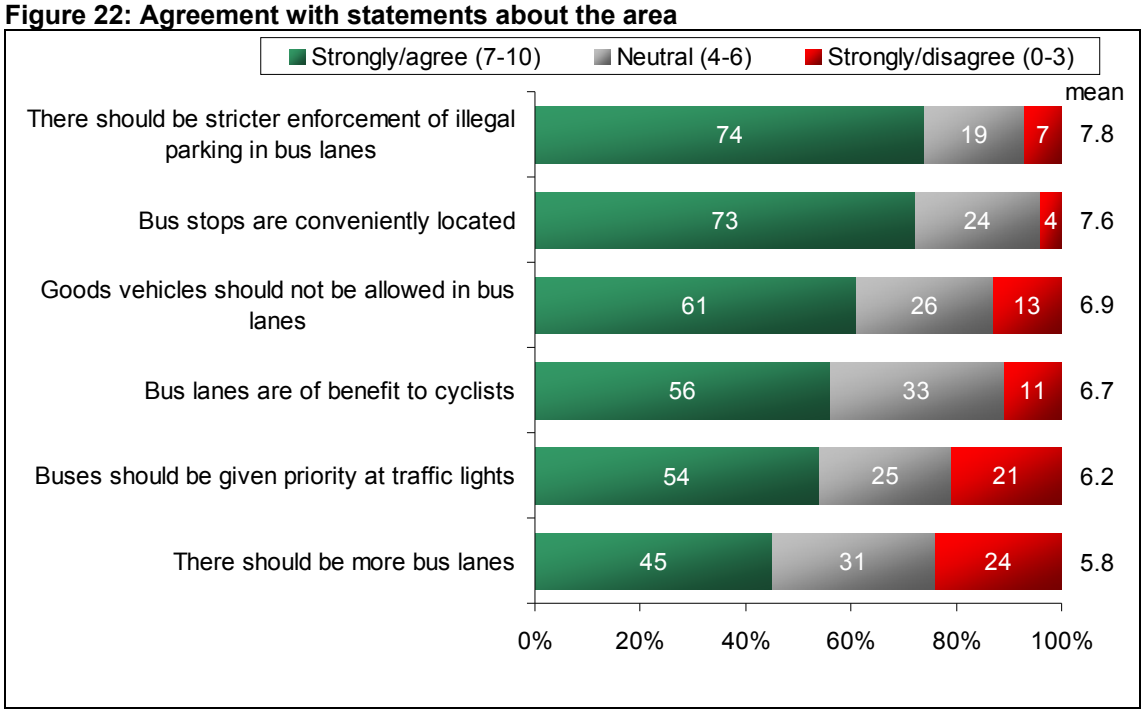
Visitors were asked their opinion on a number of aspects relating to bus lanes and bus priority measures. Generally, they were in support of all the measures.

There was strong agreement that there should be stricter bus lane enforcement (mean score 7.8), that bus stops are conveniently located (7.6) and for goods vehicles not to be allowed in bus lanes (mean score 6.9).

There was also strong agreement that bus lanes are of benefit to cyclists (mean score 6.7).

There was least support for there being more bus lanes (mean score 5.8).

Figure 22: Agreement with statements about the area



Weighted base: all respondents: 4,743

Overall, visitors to Inner London town centres were more likely to be positive towards the measures and priorities, with the exceptions of agreeing that buses should be given priority at traffic lights and that bus stops are conveniently located.

Table 11: Summary of mean scores for agreement with statements about the area by type of town centre

	Total	Central London	Inner London	Outer London
There should be stricter enforcement of illegal parking in bus lanes	7.77	7.42	7.92	7.85
Bus stops are conveniently located	7.61	7.26	7.62	7.64
Goods vehicles should not be allowed in bus lanes	6.94	6.56	7.06	6.86
Bus lanes are of benefit to cyclists	6.65	6.65	6.85	6.65
Buses should be given priority at traffic lights	6.24	6.41	6.33	6.13
There should be more bus lanes	5.75	5.75	5.87	5.57

Mean scores calculated on a scale from 0 very bad to 10 very good
1. except refused and don't know

Views of visitors to different town centres and users of different modes differed in many cases:

- There should be stricter enforcement of illegal parking in bus lanes:
  - Visitors to Stratford (mean score of 8.3), Woolwich and Greenwich (8.2) were most likely to agree and visitors to Ealing least likely to agree (7.3).
  - Cyclists were most likely to agree (8.3) and car users least likely to agree (7.4).

- Goods vehicles should not be allowed in bus lanes:
  - Visitors to Croydon (7.4) and Stratford (7.3) were most likely to agree and visitors to Ealing least likely to agree (6.4).
  - Cyclists were most likely to agree (7.6) and car users least likely to agree (6.3).

- Bus lanes are of benefit to cyclists:
  - Visitors to Camberwell (7.2) and Clapham Junction (6.9) were most likely to agree and visitors to Croydon least likely to agree (6.4).
  - Cyclists were most likely to agree (8.1) and train/Tube users least likely to agree (6.5).

- Buses should be given priority at traffic lights:
  - Visitors to Camberwell (6.8) and Harlesden (6.8) were most likely to agree and visitors to Greenwich least likely to agree (5.6).
  - Pedestrians were most likely to agree (6.5) and car users least likely to agree (5.4).

- There should be more bus lanes:
  - Visitors to Camberwell (6.7) and Harlesden (6.4) were most likely to agree and visitors to Bromley least likely to agree (4.7).
  - Bus users and cyclists were most likely to agree (6.3 and 6.2 respectively) and car users least likely to agree (4.5).

Comparison over time

There has been an increase in agreement on all statements regarding bus lanes since 2009

Net agreement	2011	2009	2004
There should be stricter enforcement of illegal parking in bus lanes	67%	60%	56%
Bus stops are conveniently located	69%	67%	-
Goods vehicles should not be allowed in bus lanes	48%	40%	30%
Bus lanes are of benefit to cyclists	45%	41%	-

Encouraging More Bus Use

Over half (55%) mentioned some improvements that could encourage (greater) bus use. Making buses more regular (16%), lower fares (16%), faster journeys (15%), more direct bus routes (15%) and more reliable buses (14%) were the most frequently suggested ways in which bus use could be encouraged as shown in Table 12 below. Two and a half improvements were mentioned on average by each respondent.

When asked for the main factor, the top three single factors that would encourage greater use of the bus were lower fares (12%), more regular buses (9%) and direct bus routes (7%).

Table 12: Factors that would encourage use of buses more often

	All respondents	
	All mentions %	Main factor %
Nothing	45	45
More regular/frequent buses	16	9
Lower fares	16	12
Faster journey	15	6
Direct bus route	15	7
More reliable buses	14	4
More seats on buses/less crowded buses	8	3
More comfortable journey	6	1
Cleaner buses	6	1
More information about buses	5	1
Make children behave/school buses	5	2
Reduce number of cars on the road/less congestion	4	1
Bus stop nearer home/destination	4	1
Safer buses	4	1
Greater priority given to buses	3	1
More shelters at bus stops	3	*
More seating at bus stops	3	*
Stricter enforcement of illegal parking in bus lanes	2	*
Improved ease of getting on and off buses	2	*
Greener buses	2	1
Other	3	2
Weighted base	**4,746**	**4,746**

* = less than 0.5%

Analysis by type of town centre shows that 'lower fares' and 'more regular/frequent buses' are the main factors that would encourage more bus use for Inner and Outer London and 'faster journey' is the main factor for Central London.

Table 13: Main factors that would encourage use of buses more often by type of centre

	Total %	Central London %	Inner London %	Outer London %
Nothing	45	47	42	47
Lower fares	12	6	12	12
More regular/frequent buses	9	4	10	8
Direct bus route	7	6	8	7
Faster journey	6	14	6	5
More reliable buses	4	2	5	4
More seats on buses/less crowded buses	3	2	3	3
Make children behave/school buses	2	0	1	2
Weighted base	**4746**	**321**	**1904**	**2521**

Only those factors for which more than 2% of respondents mentioned are shown

Over half in Bexleyheath (55%), Clapham Junction (55%), Ealing (54%) and Greenwich (53%) said nothing would encourage them to use buses more. By contrast 82% in Camberwell mentioned aspects that would encourage more bus use.

In Oxford Street/Regent Street 'faster journey' was the most important aspect with 14% mentioning this.

In Camberwell, Harlesden and Stratford 'more regular/frequent buses' were more important than 'lower fares'.

In all other town centres 'lower fares' was the most often mentioned aspect that would encourage more bus use.

3.7 Encouraging Cycling

Summary

In total 5% cycled to the town centre or sometimes cycle to the area of the town centre.

Most (62%) said nothing would encourage them to cycle. The three main improvements which would encourage more cycling were 'less road traffic' (15%), 'more dedicated cycle paths' (15%) and 'more cycle lanes on the roads' (14%).

Respondents were shown a card with the following list of potential improvements and asked which would encourage them to cycle more often in the area:

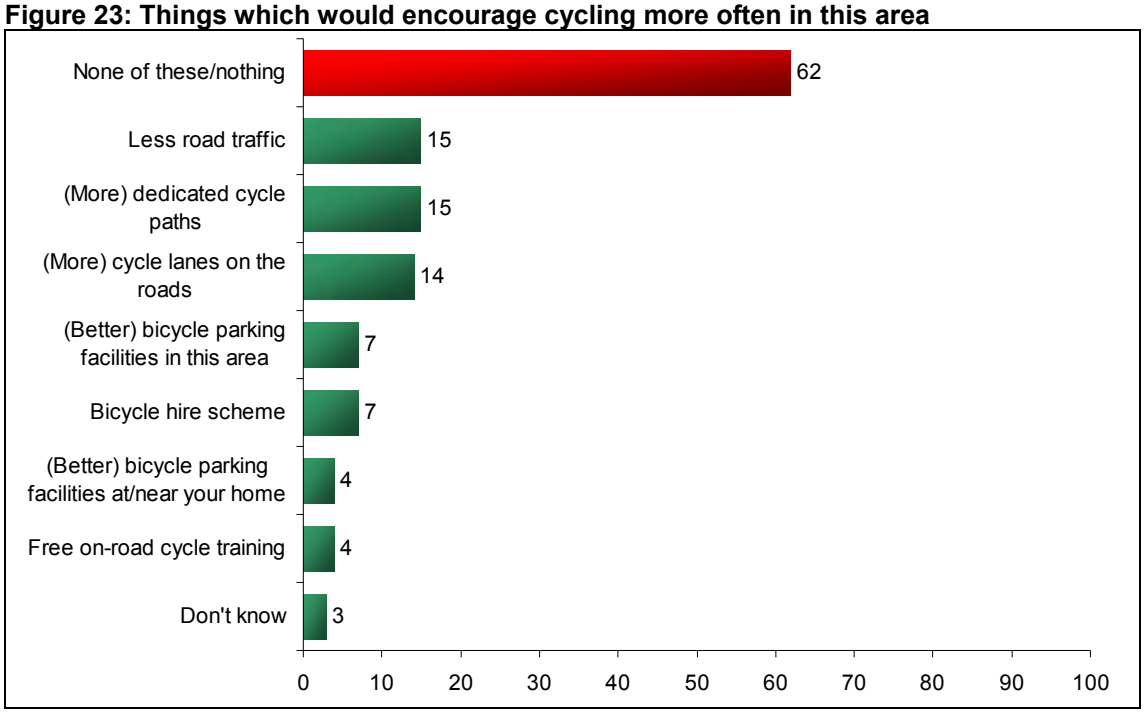
- (More) cycle lanes on the roads
- (More) dedicated cycle paths
- Less road traffic
- Free on-road cycle training
- Bicycle hire scheme
- (Better) bicycle parking facilities in this area
- (Better) bicycle parking facilities at / near your home
- None of these / nothing.

Over a third (35%) of town centre visitors mentioned at least one thing that might encourage them to cycle more often in the area.

The three main improvements were 'less road traffic' (15%), 'more dedicated cycle paths' (15%) and 'more cycle lanes on the roads' (14%).

Bicycle hire scheme was mentioned most in Greenwich (12%), Clapham Junction (9%) and Kingston (8%).

Figure 23: Things which would encourage cycling more often in this area



Weighted base: all respondents: 4,646

Cyclists were much more likely to mention something. They particularly mentioned '(more) dedicated cycle paths' (50%) and '(more) cycle lanes on the roads' (49%), 'less road traffic' (36%) and better parking facilities in the area (32%).

Table 14: Things which would encourage cycling more often in this area by mode used

	Car %	Bus %	Train/ Tube %	Bicycle %	Walk %
None of these/nothing	68	67	60	19	57
Less road traffic	12	12	18	36	18
(More) dedicated cycle paths	11	11	16	50	18
(More) cycle lanes on the roads	11	11	15	49	17
(Better) bicycle parking facilities in this area	5	6	8	32	8
Bicycle hire scheme	5	5	6	11	10
(Better) bicycle parking facilities at/near your home	2	3	6	10	5
Free on-road cycle training	2	5	4	5	5
Don't know	4	4	3	1	2
None of these/nothing	68	67	60	19	57
Weighted base	**721**	**1694**	**762**	**111**	**1294**

* = less than 0.5%

3.8 Attitudes towards Town Centres

Summary

The main ways that the town centres could be improved were better range of shops (30%), to make the streets cleaner (26%) and less traffic (21%). 14% said nothing could be done.

Two thirds of town centre visitors felt very safe and 28% felt fairly safe during the day. Of those who went out in the town centre after dark, only 26% said they felt very safe and 39% fairly safe.

A positive balance of 9% of visitors had seen more uniformed police officers in the local neighbourhood in the past year: 28% more, 19% less.

Improvements to Town Centre

Visitors were asked in what way the area could be improved. The suggestions most often mentioned were 'better range of shops' (mentioned by 30%) and to make the streets cleaner, mentioned by 26% of respondents. Having less traffic was also widely mentioned (21%).

Fourteen per cent of respondents thought that there was nothing that could be done to improve the centres, with an additional 2% not knowing what improvements there could be.

When asked what was the single most important improvement to be made, 'better range of shops', 'cleaner streets', 'less traffic' and 'remove undesirable element/more policing' were seen as the main priorities as shown in Table 15.

Table 15: Priorities for improvements to the area

	All respondents	
	All mentions %	Most important %
Nothing	14	-
Better range of shops	30	15
Cleaner streets	26	10
Less traffic	21	9
Improve shops/better quality shops	18	7
More leisure facilities	17	6
More pleasant/greener environment	17	7
Remove undesirable element/more policing	17	9
Longer shop opening hours	15	6
More public spaces	13	3
Reduce pollution	12	3
More/easier parking	12	5
More shops	10	4
Better bus service	8	3
Improve cycle facilities	8	2
High street should be pedestrianised	7	2
Improve pedestrian environment	7	2
Improve access to bus stop locations	3	1
Other	4	4
Don't know	2	3
Weighted base	**4,745**	**4,097**

The improvements can be grouped into the following categories:

	Mentions %	Most important %
Shopping facilities[11]	73	32
Travel and transport[12]	71	25
Environment[13]	63	22
Other[14]	34	15

For Central London the highest priority was in reducing traffic (19%). Also important in Central London was 'more pleasant/greener environment', 'longer shop opening hours' and 'reduce pollution'.

In Inner and Outer London town centres the priorities were 'better range of shops', 'cleaner streets' and the removal of undesirable elements/more policing. At Inner London town centres 'less traffic' was also important.

Table 16: Main priority for improvements in each area by type of centre

	Total %	Central London %	Inner London %	Outer London %
Better range of shops	15	2	17	16
Cleaner streets	10	6	10	11
Less traffic	9	19	10	6
Remove undesirable element/more policing	9	2	8	10
Improve shops / better quality shops	7	2	7	7
More pleasant/greener environment	7	9	6	7
More leisure facilities	6	7	6	7
Longer shop opening hours	6	8	4	8
More/easier parking	5	2	4	6
More shops	4	2	5	3
More public spaces	3	6	3	3
Better bus service	3	1	4	3
Reduce pollution	3	8	3	2
High street should be pedestrianised	2	7	3	2
Improve pedestrian environment	2	6	2	2
Improve cycle facilities	2	3	2	1
Weighted base	**4097**	**254**	**1736**	**2107**

All aspects mentioned by 2% or more
Shaded boxes indicate top mentions in each type of centre

The main improvement at two thirds of the town centres (Bexleyheath, Bromley, Camberwell, Clapham Junction, Ealing, Hackney, Harlesden, Harrow, Stratford and Woolwich) was a 'better range of shops'.

At Oxford Street/Regent Street and Greenwich the main improvement was 'less traffic'; at Kingston it was 'longer shop opening hours'; at Croydon it was 'remove undesirable element/more policing' and at Wood Green it was 'cleaner streets'.

[11] Better range of shops, Improve shops/better quality shops, Longer shop opening hours, More shops
[12] Less traffic, Reduce pollution, More/easier parking, Better bus service, Improve cycle facilities, Improve access to bus stop locations, High street should be pedestrianised
[13] Cleaner streets, More pleasant/greener environment, Improve pedestrian environment, More public spaces
[14] More leisure facilities, Remove undesirable element/more policing

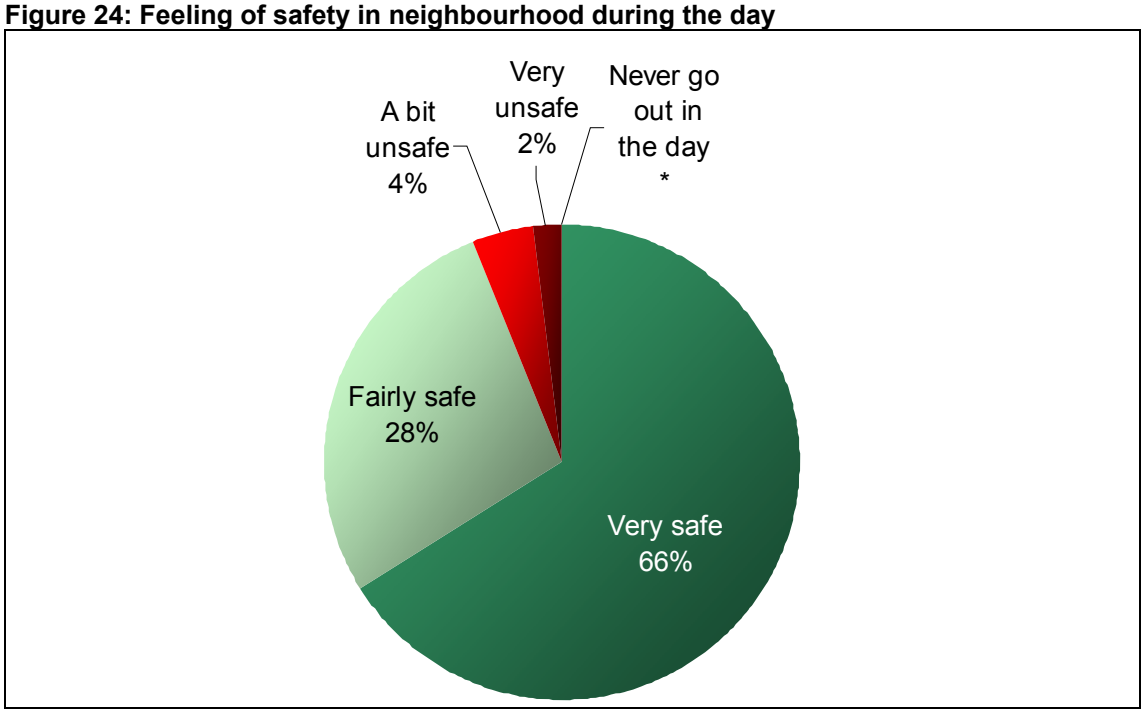
The main priorities in each of the town centres are shown in Table 75 in Appendix B.

Safety

The perceived safety of the town centre neighbourhood in day time and at night was explored. Overall, two thirds of town centre visitors felt very safe and 28% felt fairly safe during the day.

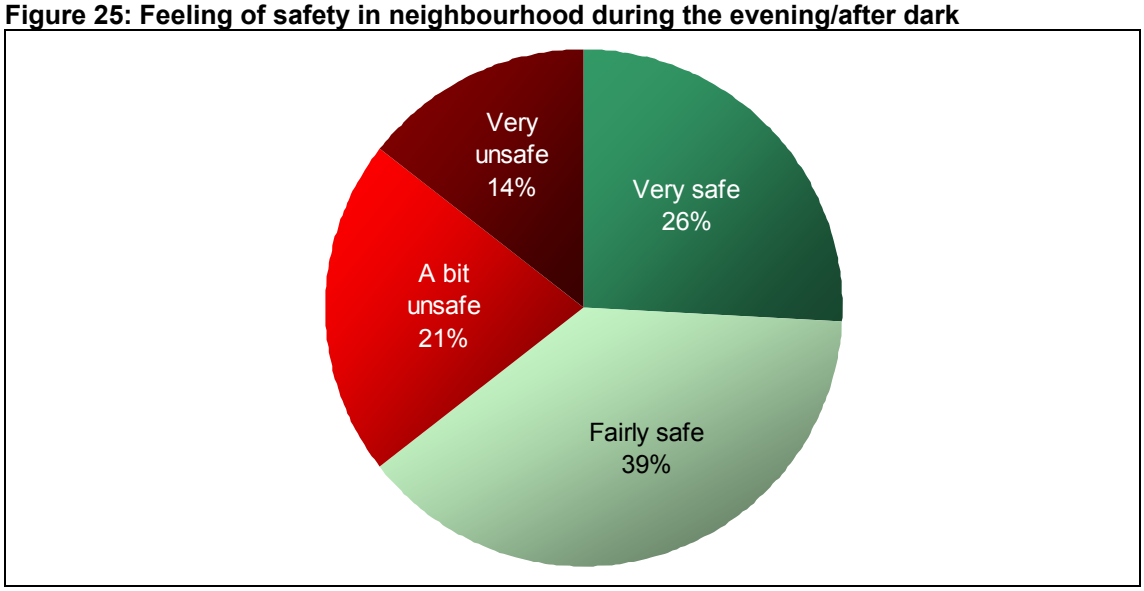
Just over a fifth (21%) didn't go out during the evening/after dark in the town centre neighbourhood. Of those who did, the feeling of safety fell markedly with only 26% saying they felt very safe and 39% fairly safe.

Figure 24: Feeling of safety in neighbourhood during the day



Weighted base: all respondents 4,745

Figure 25: Feeling of safety in neighbourhood during the evening/after dark



Weighted base: those who went out in the evening/after dark: 3,760

Visitors to Central London felt safer there both in the day time and in evening/after dark. There was little difference between Inner and Outer London town centres.

Table 17: Feeling of safety in neighbourhood in day time and in evening/after dark by type of centre

	day time			evening/after dark*		
	Central London %	Inner London %	Outer London %	Central London %	Inner London %	Outer London %
Very safe	78	65	66	47	24	25
Fairly safe	19	30	28	40	38	38
A bit unsafe	1	4	4	9	21	23
Very unsafe	1	2	1	4	17	14
Weighted base	**321**	**1904**	**2519**	**267**	**1548**	**1946**

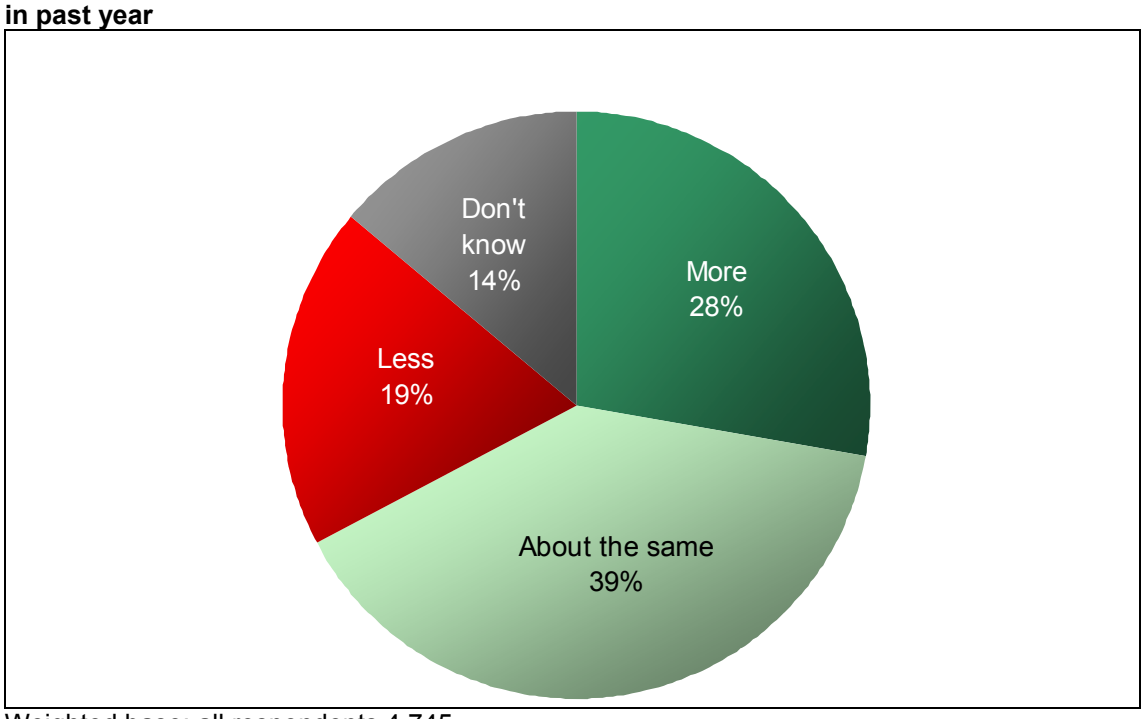
* those who went out in the evening/after dark

The town centres with the highest proportions feeling unsafe are Woolwich (12% a bit unsafe/very unsafe), Croydon (11%), Harlesden (10%) and Wood Green (10%).

The town centres with the highest proportions feeling very unsafe are Woolwich (33% very unsafe), Stratford (27%), Croydon (22%) and Wood Green (20%).

A positive balance of 9% of visitors had seen more uniformed police officers in the local neighbourhood in the past year: 28% more, 19% less.

Figure 26: Whether seen more or less uniformed police officers in local neighbourhood in past year



Weighted base: all respondents 4,745

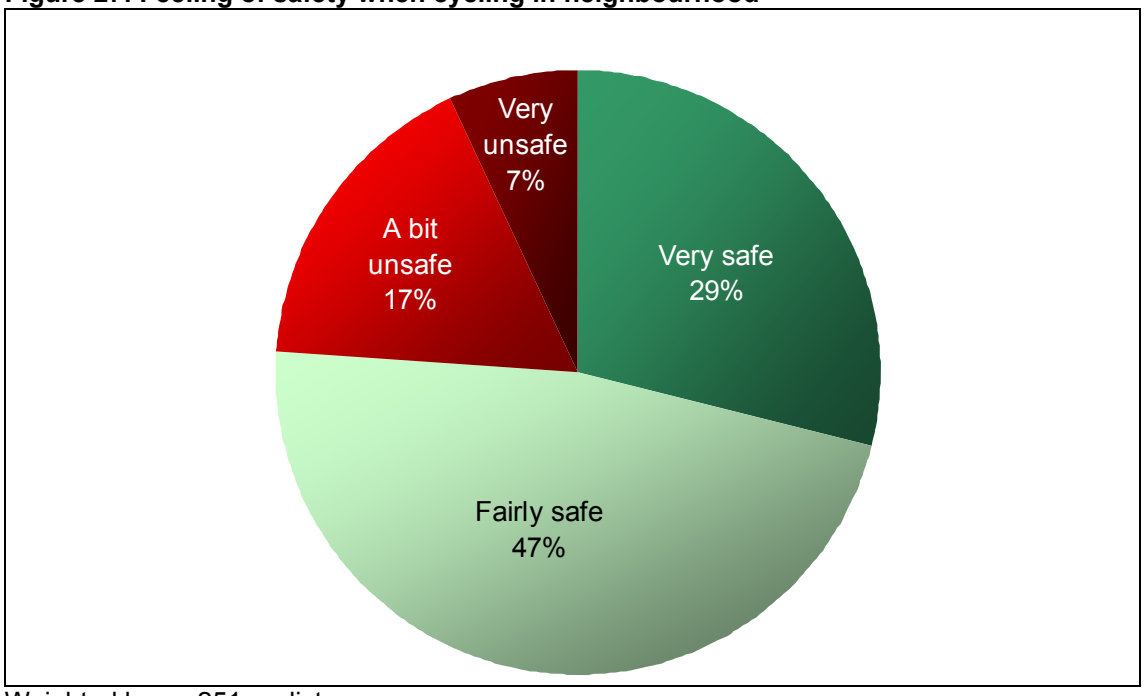
In Central London a balance of 4% had seen **fewer** uniformed police officers in the local neighbourhood.

The town centres with the highest balance of those who had seen **more** uniformed police officers in the local neighbourhood in the past year were Bexleyheath (+30%), Woolwich (+28%), Stratford (+19%) and Bromley (+18%).

The town centres with the highest balance of those who had seen **fewer** uniformed police officers in the local neighbourhood in the past year were Harlesden (-10%), Camberwell (-6%) and Wood Green (-5%).

Over three quarters (76%) of cyclists felt very or fairly safe when cycling in the town centre neighbourhood. Seven per cent felt very unsafe.

Figure 27: Feeling of safety when cycling in neighbourhood



Weighted base: 251 cyclists

3.9 Use of Other Shopping Centres

Summary

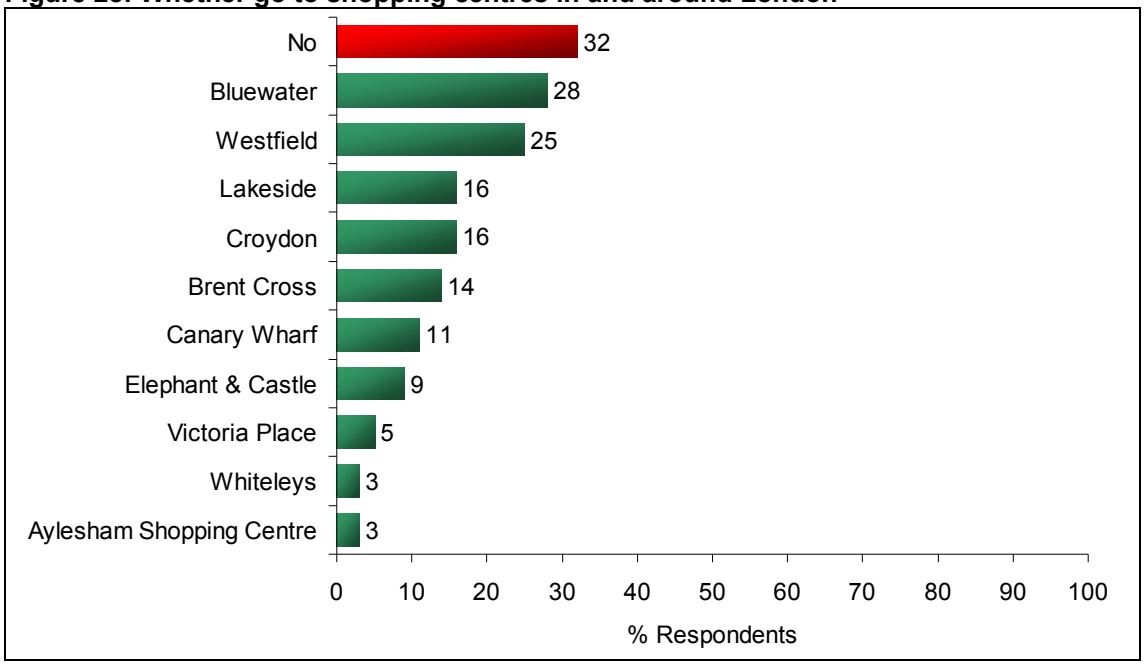
Over two thirds of town centre visitors go to other shopping centres in and around London. The most visited shopping centres were Bluewater (28%) and Westfield (25%).

Respondents who accessed the town centre by bus, cycle and on foot were least likely to visit other shopping centres.

Over two thirds of town centre visitors (68%) go to other shopping centres in and around London. The most visited other shopping centres[15] were Bluewater (28%) and Westfield (25%).

[15] From a list shown to respondents

Figure 28: Whether go to shopping centres in and around London



Weighted base: all respondents: 4,746

Visitors to Central London were much more likely to visit Westfield than those from Inner or Outer London town centres.

Table 18: Whether go to shopping centres in and around London by type of centre

	Central London %	Inner London %	Outer London %
No	35	33	31
Bluewater	29	29	27
Westfield	34	20	26
Lakeside	21	19	13
Croydon	10	14	18
Brent Cross	18	7	19
Canary Wharf	16	16	7
Elephant & Castle	8	14	5
Victoria Place	7	5	4
Whiteleys	7	2	3
Aylesham Shopping Centre	2	5	2
Weighted base	**321**	**1904**	**2521**

Respondents who accessed the town centre by bus, cycle and on foot were least likely to visit other shopping centres.

	Visit other shopping centres
• Car	78%
• Train/Tube	75%
• Bus	68%
• Walk	60%
• Bicycle	51%.

The specific other shopping centres visited were very much a function of the location of the town centre. For example 75% at Bexleyheath visited Bluewater and 37% visited Lakeside, 44% at Camberwell visited Elephant & Castle, 40% at Harlesden visited Brent Cross, 64% at Ealing visited Westfield, 28% at Greenwich visited Canary Wharf.

3.10 Oxford Street/Regent Street

Summary

Oxford Street is visited because of its shopping facilities: 27% considered it to be the best shopping area, 21% were visiting a particular shop and 15% cited 'more/better/ bigger range of shops'.

Just over a third (36%) of visitors to Oxford Street were aware of the changes to travel around Tottenham Court Road. This is twice the proportion as in 2009.

Of those who were aware 51% knew it was because of building rail/Crossrail station.

Only 8% of visitors to Oxford Street/Regent Street said they were affected by the travel changes around Tottenham Court Road.

Over half (53%) had used the diagonal crossing at Oxford Circus and there were very high levels of satisfaction with both the safety and ease of crossing the road on the diagonal crossing.

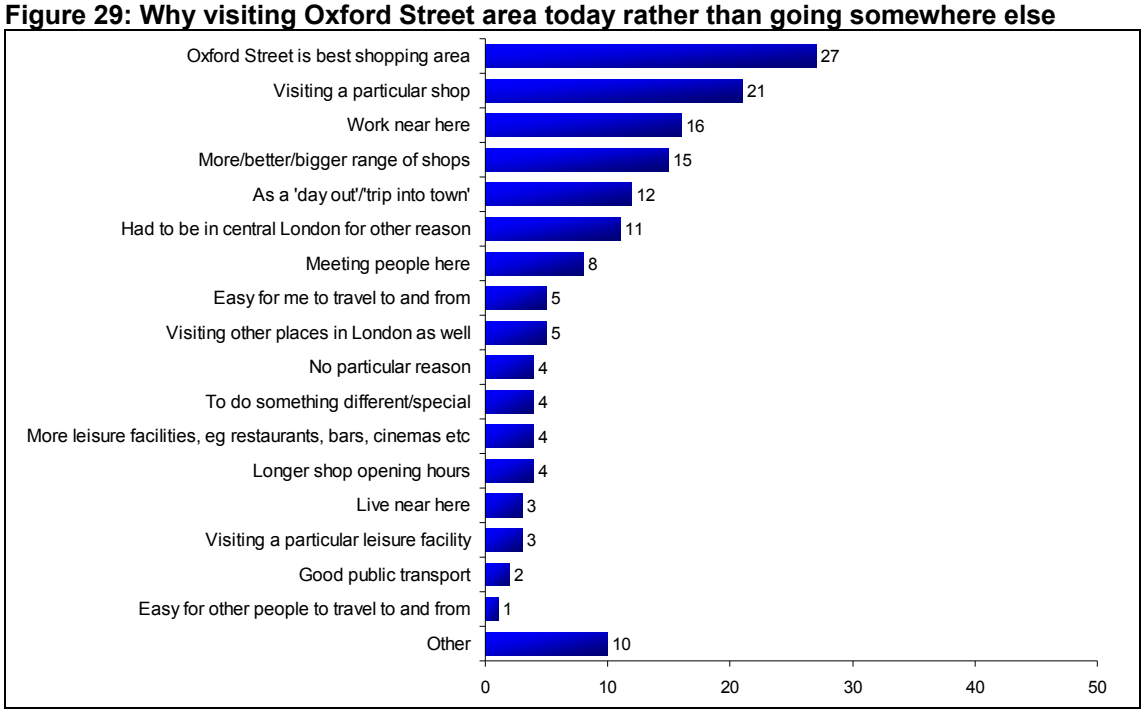
There were specific questions asked for respondents at Oxford Street/Regent Street covering possible disruption because of Crossrail works, the diagonal crossing at Oxford Circus and why they visit the area.

Why visit Oxford Street

The main reason why respondents at Oxford Street were visiting Oxford Street rather than going somewhere else was because of its shopping facilities: it was considered to be the best shopping area by 27%, 21% were visiting a particular shop and 15% cited 'more / better / bigger range of shops'.

The main non shopping reasons mentioned were working near Oxford Street (16%) and a day out/trip into town (12%).

Figure 29: Why visiting Oxford Street area today rather than going somewhere else



Base: 320 visitors to Oxford Street/Regent Street

Awareness of changes to travel around Tottenham Court Road

Just over a third (36%) of visitors to Oxford Street were aware of the changes to travel around Tottenham Court Road. This is twice the proportion as in 2009.

Respondents who lived or worked within ten minutes of Oxford Street were much more likely to be aware than those who didn't: 69% compared to 29%. There were similar levels of awareness by those who accessed by car, bus and train/Tube (about a third each) whereas those who accessed the area on foot (and therefore likely to live nearby) were more likely to be aware (49%).

Awareness for reasons for diversions and travel changes

Of those who were aware of the changes to travel around Tottenham Court Road just over half (51%) knew it was because of building rail/Crossrail station (18% of all visitors to Oxford Street).

Other reasons mentioned included:

- Improving Underground station 18%
- Building works (unspecified) 9%
- Transport works (unspecified) 8%
- Utility works (eg electricity, gas, water) 7%
- Improving road layout/better roads 5%
- Improving bus facilities/bus routes 2%
- Improving pavements/pedestrian facilities 2%

A fifth said they didn't know.

Impact of travel changes on travel

Only 8% of visitors to Oxford Street/Regent Street said they were affected by the travel changes around Tottenham Court Road.

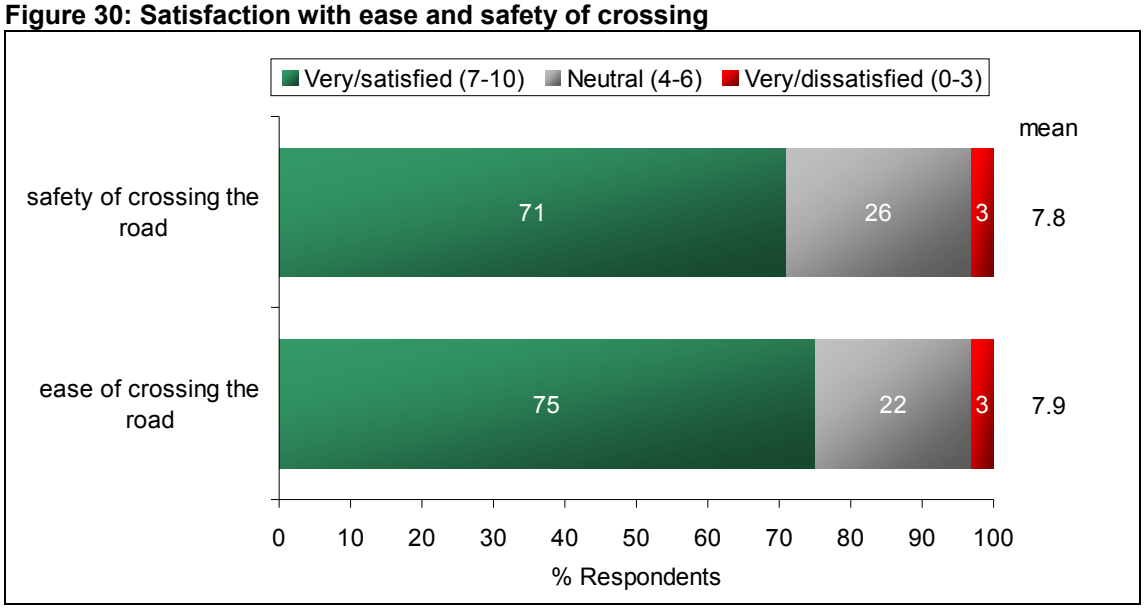
Of the minority (26 people[16]) that were affected, 11 changed their usual bus, four changed their usual Tube journey, two changed their driving route, two changed their walking route, two avoided getting a bus and two avoided driving.

Diagonal Crossing

Over half the visitors (53%) to Oxford Street/Regent Street had used the diagonal crossing at Oxford Circus.

There were very high levels of satisfaction with both the safety and ease of crossing the road on the diagonal crossing.

Figure 30: Satisfaction with ease and safety of crossing



Base: 170 visitors to Oxford Street/Regent Street who used diagonal crossing
Mean scores based on 0 = very dissatisfied and 10 = very satisfied

Older respondents and women gave slightly higher satisfaction scores than younger respondents and men:

	16-24	25-44	45-60	60+	Male	Female
• ease of crossing the road	7.9	7.9	8.0	8.0	7.8	8.0
• safety of crossing the road	7.2	7.8	8.0	8.0	7.7	7.8
Base	39	79	34	17	69	101

[16] Access modes were: bus 10, train/Tube 8, walk 3, car 2, bicycle 1, other 1

3.11 Shopping and Expenditure in the Area

Summary

Almost half (46%) were shopping for groceries and food, 33% were shopping for clothes or footwear, 18% were using a service and 17% were eating out.

Those in Inner and Outer London town centres were most likely to be shopping for food and groceries (52% and 45% respectively) whereas those in Central London were most likely to be shopping for clothing or footwear (61%).

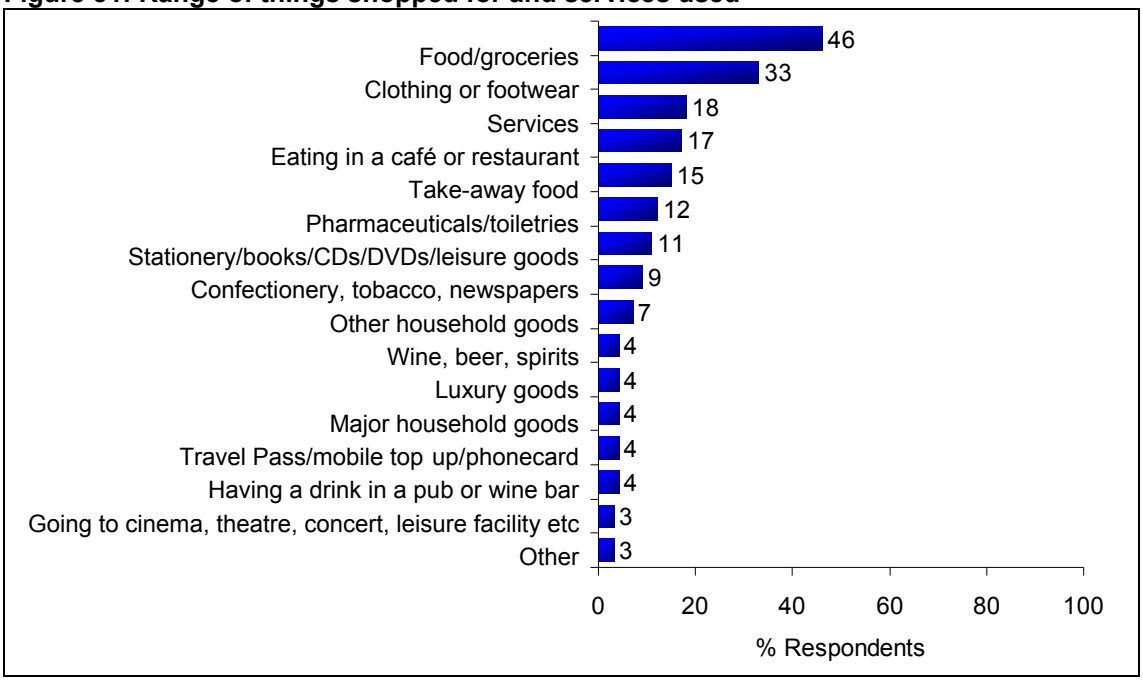
A wide range of services and shops were visited by respondents. Almost half of the visitors to the town centres were shopping for groceries and food (46%) and a third were shopping for clothes or footwear as shown in Figure 31.

It is worth noting that larger items such as household white and brown goods are less frequent purchases and that the survey is more likely to pick up regular purchases and more portable items.

Other items or services that were mentioned by 10% or more were:

- Services (eg hairdressers) 18%
- Café or restaurant 17%
- Take away food 15%
- Pharmaceuticals/toiletries 12%
- Stationery, books, CDs, DVDs, leisure goods 11%.

Figure 31: Range of things shopped for and services used



Weighted base: 4,738

Those in Inner and Outer London town centres were most likely to be shopping for food and groceries (52% and 45% respectively) whereas than those in Central London were most likely to be shopping for clothing or footwear (61%).

In Central London 14% were shopping for luxury goods compared to 3-4% elsewhere.

Use of services was much higher in Inner and Outer London town centres than in Central London: 18-19% compared to 9%.

Table 19: Range of shopping and services by type of centre

	Total %	Central London %	Inner London %	Outer London %
Food/groceries	46	10	52	45
Clothing or footwear	33	61	22	38
Services	18	9	19	18
Eating in a café or restaurant	17	19	17	17
Take-away food	15	22	17	12
Pharmaceuticals/toiletries	12	10	14	12
Stationery/books/CDs/DVDs/leisure goods	11	14	10	11
Confectionery, tobacco, newspapers	9	6	10	9
Other household goods	7	5	6	7
Wine, beer, spirits	4	4	5	4
Luxury goods	4	14	3	4
Major household goods	4	5	4	5
Travel Pass/mobile top up/phonecard	4	4	6	3
Having a drink in a pub or wine bar	4	5	4	4
Going to cinema, theatre, concert, leisure facility etc	3	2	4	3
Other	3	5	3	3
Weighted base	**4,738**	**313**	**1,904**	**2,521**

More than one answer may be given so totals may not add to 100%

Food/grocery shopping was most mentioned at two thirds of the town centres (Bexleyheath, Camberwell, Clapham Junction, Ealing, Greenwich, Hackney, Harlesden, Stratford, Wood Green and Woolwich) and least mentioned at Oxford Street.

Clothing or footwear shopping was most mentioned at the other five town centres (Bromley, Croydon, Harrow, Kingston and Oxford Street/Regent Street).

Analysis by town centre categories used in the London Plan is shown in Table 20. This shows that food/grocery shopping was most mentioned at District and Major town centres (55% and 53% respectively) and least mentioned at International town centres (10%).

Clothing or footwear shopping was most mentioned at International town centres (61%) and least mentioned at District town centres (15%).

Table 20: Range of shopping and services by London Plan town centre category

	International %	Metropolitan %	Major %	District %
Food/groceries	10	41	53	55
Clothing or footwear	61	43	30	15
Services	9	17	17	22
Eating in a café or restaurant	19	19	14	17
Take-away food	22	13	12	19
Pharmaceuticals/toiletries	10	11	14	13
Stationery/books/CDs/DVDs/leisure goods	14	12	11	9
Confectionery, tobacco, newspapers	6	9	8	11
Other household goods	5	7	9	5
Wine, beer, spirits	4	3	4	6
Luxury goods	14	5	4	3
Major household goods	5	4	4	4
Travel Pass/mobile top up/phonecard	4	3	4	6
Having a drink in a pub or wine bar	5	5	4	4
Going to cinema, theatre, concert, leisure facility etc	2	3	3	4
Other	5	3	2	3
Weighted base	**313**	**1905**	**1258**	**1262**

3.12 Average Spend

Summary

The average spend was £36 on the day of interview which is similar to the usual spend per visit (£32). The average spend per week was £72. The average spend per month was £290.

Average spend per visit by mode was car £41, train/Tube £38, bus £32, walk £26 and cycle £21.

Average spend per week by mode was walk £93, bus £70, train/Tube £59, car £56 and cycle £47.

Average spend per month by mode was walk £373, bus £282, train/Tube £239, car £226 and cycle £188.

Visitors were asked how much they anticipated spending in the centre during their visit and also how much they spend on average per visit. An average total spend per week was then calculated based on the frequency of visiting the centre. It should be noted that respondents were asked how much they had spent according to broad bands of expenditure. In order to calculate the average spend figures mid point values were applied to the bands and full details of these values are provided in Appendix C.

Overall the average spend was £36 on the day of interview which is similar to the usual spend per visit (£32). The average spend per week was £72 and the average spend per month was £289.

Table 21: Average spend

	Spend today %	Average spend per visit %	Average total spend per week* %	Average total spend per month* %
Nothing	5	2	2	2
Under £5	11	9	8	2
£5-£19.99	33	38	22	6
£20-£49.99	29	31	26	10
£50-£99.99	14	14	22	16
£100+	7	5	19	65
Mean	**£36**	**£32**	**£72**	**£290**
Base	**4,541**	**4,258**	**4,252**	**4,252**

* excludes those who did not give an expenditure or frequency of visiting area.

Those who visit Central London spend the most on average per week (£78) and month (£315) although they visit much less often than visitors to Inner and Outer London town centres (reflecting the fact that this group spend most per visit).

Table 22: Average spend today, per visit and per week by type of centre

	Central London				Inner London				Outer London			
	Spend today %	Average spend per visit %	Average total spend per week* %	Average total spend per month* %	Spend today %	Average spend per visit %	Average total spend per week* %	Average total spend per month* %	Spend today %	Average spend per visit %	Average total spend per week* %	Average total spend per month* %
Nothing	3	3	3	3	5	3	3	3	5	2	2	2
Under £5	8	7	14	5	13	11	9	2	10	8	7	1
£5 - £19.99	17	21	23	6	39	43	21	7	31	36	23	5
£20 - £49.99	22	24	27	14	30	31	26	8	29	32	26	11
£50 - £99.99	23	25	16	17	9	11	21	15	17	16	23	16
£100+	27	21	18	55	4	2	20	66	8	5	18	65
Mean	**£74**	**£63**	**£78**	**£315**	**£27**	**£26**	**£74**	**£298**	**£37**	**£34**	**£70**	**£281**
Base[1]	**286**	**251**	**250**	**250**	**1830**	**1699**	**1696**	**1696**	**2422**	**2311**	**2307**	**2307**

1. except refused and don't know

Oxford Street/Regent Street (£78), Croydon (£50) and Kingston (£48) were the town centres with the highest levels of spend on the day of interview. Oxford Street/Regent Street and Croydon were also the locations with the highest levels of spend on average.

Visitors to Greenwich (£19) and Hackney (£21) spent the least.

Those visiting Clapham Junction spend the most on average per week and month (£95 and £380 respectively), with those visiting Harlesden (£87 and £348) and Croydon (£86 and £346) also having high weekly spends. Those visiting Harrow (£55 and £221) and Greenwich (£57 and £229) spent least on average per week.

Those in Oxford Street/Regent Street tend not to be such regular visitors to the area and this is reflected in the average spend per week and month which is similar to Stratford (at £78 and £311) and only a little above the average of £72 per week and £290 per month. This would indicate that places such as Harlesden attract more locally based and regular shoppers for goods such as groceries and household goods whereas those in the West End visit more for luxury goods such as clothes and footwear. The average spend

by visitors at each centre is shown in Table 71, Table 72, Table 73 and Table 74 in Appendix B.

Spend by Mode

Those who travelled by car were also high spenders on the day of the interview (36% spent £50 or more). In comparison, only 20% of those who travelled by bus and 13% of those who walked to the centre spent £50 or more.

Those who travelled by bus spent an average of £34 on the day of interview. Those who travelled by car spent the most on average on the day of interview (£50) but those who travelled by train/Tube were also high spenders (£44 on average). Those who cycled and walked to the centre spent the least (£21 and £26 respectively). These figures are shown in Table 23.

Table 23: Average spend by mode on day

	Car %	Bus %	Train/Tube %	Bicycle %	Walked %	Taxi/ minicab/ other %
Nothing	4	5	5	6	6	3
Under £5	8	10	12	19	14	10
£5 - £19.99	25	32	29	44	41	33
£20 - £49.99	27	33	25	21	27	26
£50 - £99.99	24	13	15	5	10	16
£100+	12	7	12	4	3	11
Mean	**£50**	**£34**	**£44**	**£21**	**£26**	**£42**
Base[1]	**711**	**1651**	**723**	**108**	**1286**	**61**

1. except refused and don't know

A similar pattern was found in the average spend per visit, with 29% of car drivers/passengers spending an average of £50 or more per visit.

With respect to the overall average spend per visit, car drivers/passengers spent £41, train/Tube passengers £38, bus customers £32, those who walk £26 and those who cycle £21.

Table 24: Average spend by mode per visit

	Car %	Bus %	Train/Tube %	Bicycle %	Walked %	Taxi/ minicab/ other %
Nothing	2	2	4	1	3	*
Under £5	6	8	14	19	9	8
£5 - £19.99	29	38	31	49	45	42
£20 - £49.99	34	33	25	25	31	34
£50 - £99.99	21	15	16	5	10	8
£100+	8	4	9	0	2	9
Mean	**£41**	**£32**	**£38**	**£18**	**£26**	**£40**
Base[1]	**680**	**1573**	**656**	**99**	**1198**	**53**

* = less than 0.5%

1. except refused and don't know

If the frequency of visiting the area is taken into account, however, there is a more even distribution of spend by mode. The total average spend per week by mode (see Table 25) shows that those who walk to the area tend to spend most on average per week (£93 on average). Those travelling by bus spend the next most per week on average (£70) whereas those travelling to the area by cycle and car spend the least (£47 and £56 respectively).

The total average spend per month by mode (see Table 26) shows that average spend for those who walk to the area was £373, for bus it was £282, for train/Tube it was £239, for car it was £226 and for cycle it was £188.

The high weekly and monthly spend for those who access town centres on foot and by bus is because of the relatively high frequency of visits on foot and by bus.

Table 25: Average total spend per week by mode

	Car %	Bus %	Train/Tube %	Bicycle %	Walked %	Taxi/ minicab/ other %
Nothing	2	2	4	1	3	
Under £5	12	8	16	10	3	9
£5 - £19.99	26	23	26	32	16	17
£20 - £49.99	26	28	25	26	25	32
£50 - £99.99	19	22	15	21	28	20
£100+	15	18	14	10	26	22
Mean	**£56**	**£70**	**£59**	**£47**	**£93**	**£64**
Base[1]	**680**	**1569**	**654**	**99**	**1197**	**53**

1. except refused and don't know

Table 26: Average total spend per month by mode

	Car %	Bus %	Train/Tube %	Bicycle %	Walked %	Taxi/ minicab/ other %
Nothing	2	2	4	1	3	0
Under £5	2	1	5	4	*	2
£5 - £19.99	8	6	9	6	2	7
£20 - £49.99	13	11	13	9	5	6
£50 - £99.99	18	16	17	25	12	11
£100+	57	64	51	56	78	74
Mean	**£226**	**£282**	**£239**	**£188**	**£373**	**£257**
Base[1]	**680**	**1569**	**654**	**99**	**1197**	**53**

1. except refused and don't know

It should be noted that visitors may use a number of different modes to access the area, for example car users may also travel to the town by bus on other occasions (35% of those who travelled by car also use the bus), but this calculation is based on the mode used on the day of interview.

Spend by London Plan Town Centre Category

Analysis by town centre categories used in the London Plan is shown in Table 27.

Those who visit International town centres spend the most on the day of visit: more than three times the amount spent at District town centres and more than twice the amount spent at Major town centres.

However, the average spend per week and month is similar across town centre categories (between £67 and £79 per week and between £269 and £315 per month) as those in District and Major town centres visit more often than those at Metropolitan and International town centres.

Table 27: Average spend today, per visit and per week by London Plan town centre category

Spend today	International %	Metropolitan %	Major %	District %
Nothing	3	5	5	6
Under £5	8	10	11	15
£5 - £19.99	17	29	32	45
£20 - £49.99	22	29	34	25
£50 - £99.99	23	18	13	7
£100+	27	9	6	2
Mean	**£74**	**£40**	**£33**	**£22**
Spend per visit				
Nothing	3	2	2	3
Under £5	7	9	7	13
£5 - £19.99	21	34	37	49
£20 - £49.99	24	33	36	26
£50 - £99.99	25	17	14	8
£100+	21	6	4	2
Mean	**£63**	**£35**	**£31**	**£22**
Spend per week				
Nothing	3	2	2	3
Under £5	14	8	8	9
£5 - £19.99	23	24	20	22
£20 - £49.99	27	27	25	25
£50 - £99.99	16	21	23	23
£100+	18	18	23	18
Mean	**£78**	**£67**	**£79**	**£72**
Spend per month				
Nothing	3	2	2	3
Under £5	3	1	1	2
£5 - £19.99	10	6	7	7
£20 - £49.99	11	10	8	8
£50 - £99.99	21	17	14	15
£100+	51	63	68	66
Mean	**£313**	**£269**	**£315**	**£289**
Base[1]	**250**	**1744**	**1112**	**1146**

1. except refused and don't know

Comparison over time

There has been an increase in weekly spend by PT users since 2004, a fall for car users since 2004, a rise for pedestrians since 2009 after a fall from 2004 and a large fall in spend for cyclists since 2009[17].

	2011	2009	2004
Total	**£72**	**£69**	**£69**
Bus	£70	£66	£63
Walk	£93	£89	£91
Car	£56	£61	£64
Train/Tube	£59	£50	£46
Bicycle	£47	£64	-

Similarly, there has been an increase in monthly spend by PT users since 2004, a fall for car users since 2004, a rise for pedestrians since 2009 after a fall from 2004 and a large fall in spend for cyclists since 2009[18].

	2011	2009	2004
Total	**£290**	**£276**	**£276**
Bus	£282	£265	£252
Walk	£373	£360	£364
Car	£226	£243	£256
Train/Tube	£239	£201	£184
Bicycle	£188	£258	-

As might be expected, the more time the visitor intended to spend in the area the more money they are likely to spend. For example, 30% of those spending between £5 and £19.99 were planning to be in the area for less than an hour whereas only 8% of those who were planning to spend £100 or more were going to be in the area for less than an hour.

Table 28: Average time spent in the town centre by amount spent on the day

		Amount spent on the day					
	Total %	**Nothing %**	**Under £5 %**	**£5 - £19.99 %**	**£20 - £49.99 %**	**£50 - £99.99 %**	**£100+ %**
Under 5 minutes	*	1	0	*	0	0	*
5-14 minutes	1	4	3	1	1	*	1
15-29 minutes	5	12	8	7	3	1	3
30-59 minutes	17	27	17	22	17	12	4
1-3 hours	48	34	29	42	56	62	55
More than 3 hours	26	20	42	27	21	23	37
Don't know	1	2	1	1	1	1	*
Base	**4746**	**232**	**518**	**1512**	**1307**	**633**	**339**

* = less than 0.5%

[17] the higher spend in 2009 was mostly driven by a small number of cyclists who give very high average spend per week responses: 4% over £250 compared to none for 2011. If we were to remove responses over £250, the average weekly spend for 2009 drops to £51 which is much closer to the figure for 2011

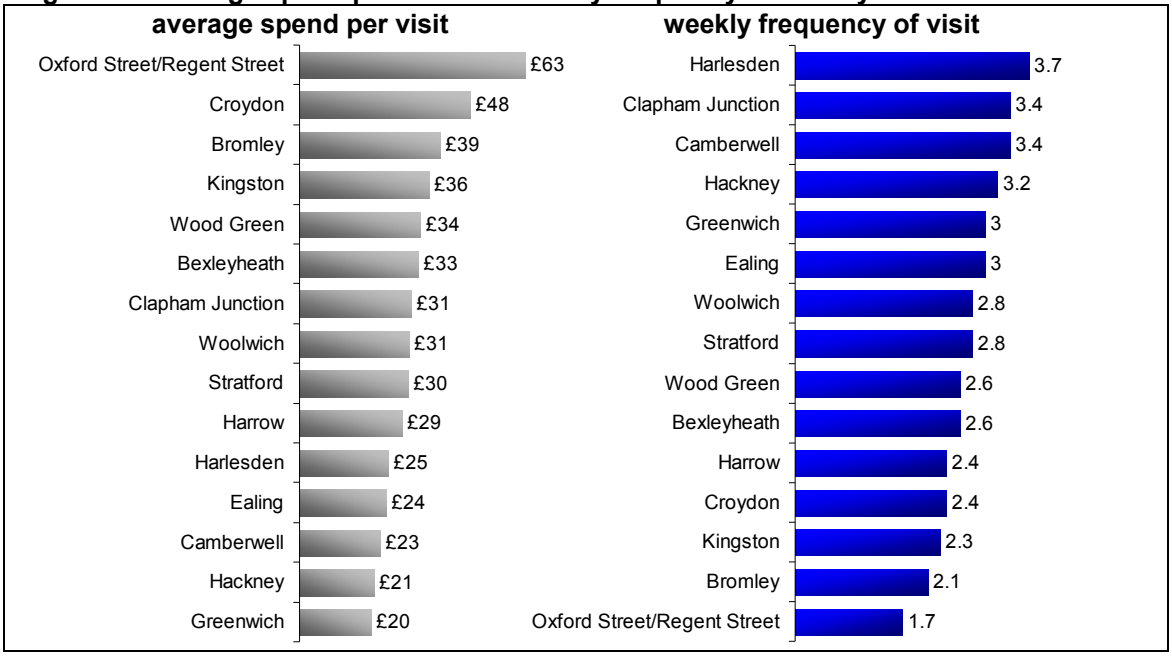
[18] the higher spend in 2009 was mostly driven by a small number of cyclists who give very high average spend per month responses: 4% over £1,000 compared to none for 2011. If we were to remove responses over £1,000, the average monthly spend for 2009 drops to £206 which is much closer to the figure for 2011

Spend by Town Centre

The highest spend per visit was at Oxford Street/Regent Street, Croydon and Bromley and the lowest spend per visit was at Greenwich, Hackney and Camberwell.

There was an inverse relationship between spend per visit and frequency of visiting, for example Oxford Street/Regent Street has highest spend per visit but is least visited town centre.

Figure 32: Average spend per visit and weekly frequency of visit by town centre



With the exception of Oxford Street/Regent Street, there was a tendency for town centres with malls to have higher spend than those without. Croydon, Bromley, Kingston, Bexleyheath, Wood Green, Stratford and Ealing have malls.

3.13 Online Shopping

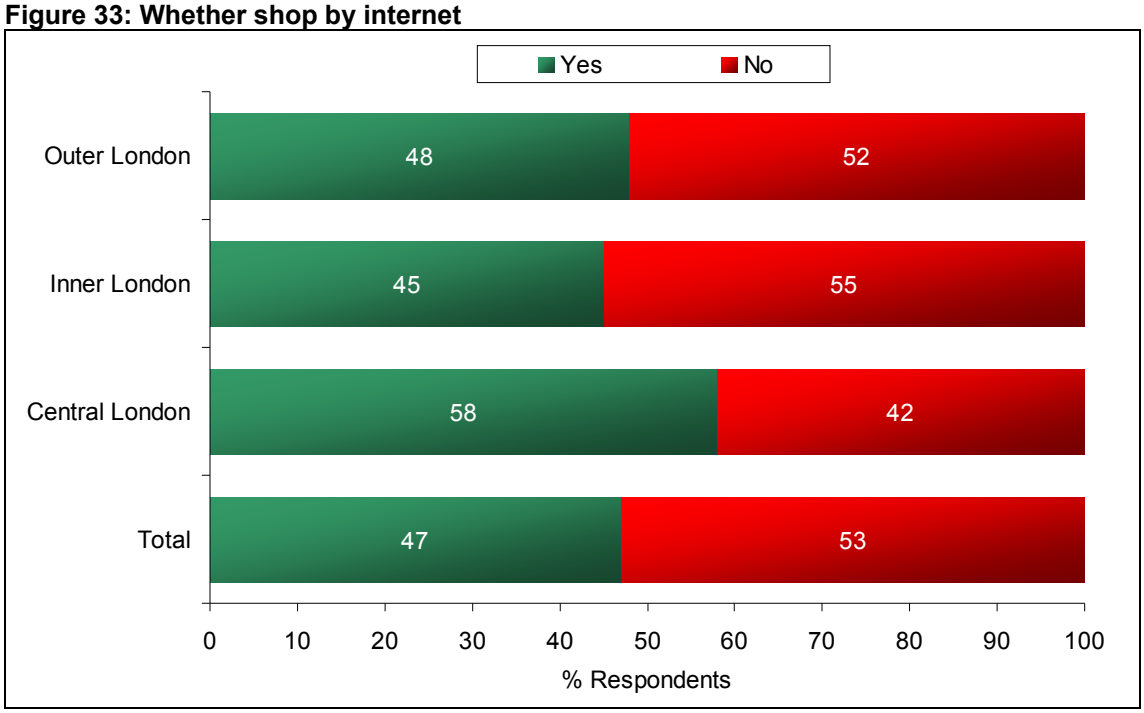
Summary

Just under half of town centre visitors (47%) shop by internet. Bus users and pedestrians least likely to shop by internet

The main goods purchased online are books/CDs/DVDs/leisure goods (64%), clothing/footwear (57%), tickets (46%) and household goods (43%).

Just under half of town centre visitors (47%) shop by internet. Visitors to Central London were most likely to shop by internet. See Figure 33.

Figure 33: Whether shop by internet



Weighted base: Total 4,743, Central London 321; Inner London 1,903; Outer London 2,519

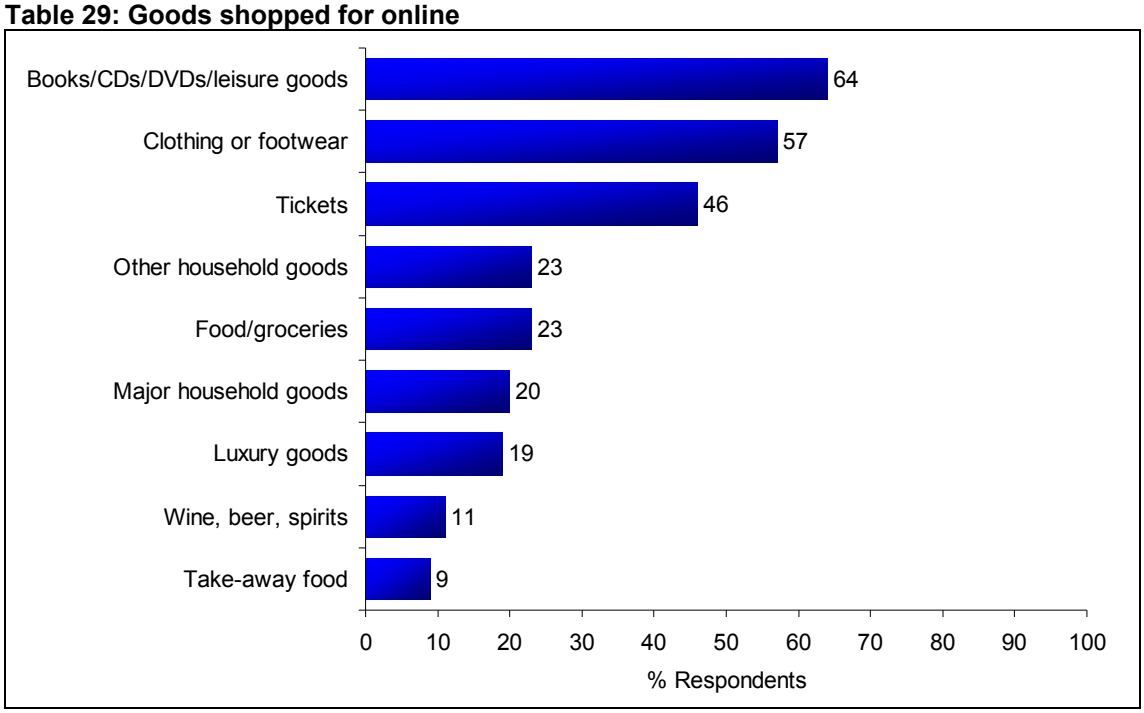
Bus users and pedestrians least likely to shop by internet.

- Train/Tube 59%
- Car 58%
- Bicycle 57%
- Walk 47%
- Bus 37%.

The highest levels of internet shopping were by visitors to Kingston (58%), Oxford Street/Regent Street (58%) and Bromley (57%) and the lowest by visitors to Harlesden (26%). The proportion shopping by internet at the other centres ranged from 40% to 53%.

The main goods purchased online are books/CDs/DVDs/leisure goods (64%), clothing/footwear (57%), tickets (46%) and household goods (43%).

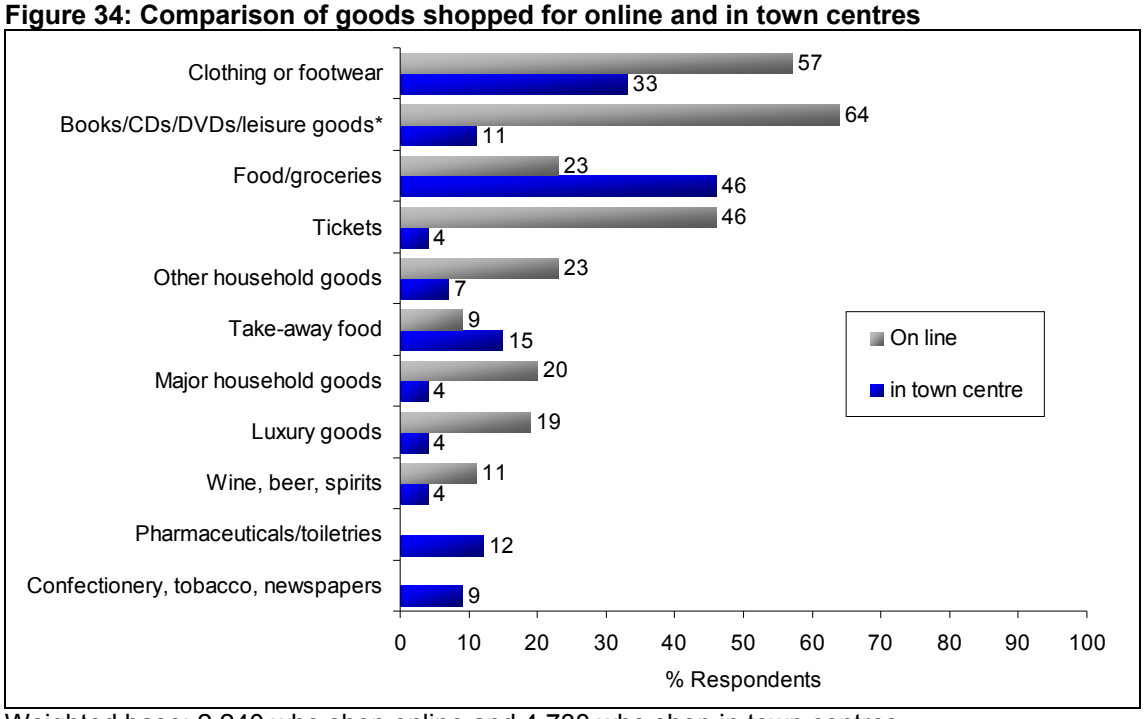
Table 29: Goods shopped for online



Weighted base: 2,240 who shop online

Figure 34 shows a comparison of the type of goods shopped for online and in town centres. Online predominates for books/CDs/DVDs/leisure goods, clothing/footwear, tickets, household goods and luxury goods. 'In town centres' predominates for food/groceries and take away food.

Figure 34: Comparison of goods shopped for online and in town centres



Weighted base: 2,240 who shop online and 4,738 who shop in town centres
* includes 'stationary' for shoppers in town centre
For online, 'confectionery, tobacco, newspapers' and 'pharmaceuticals/toiletries' not included

3.14 Respondent Characteristics

Summary

60% of town centre visitors were female.

There was an even spread of ages, with similar proportions in the four age groups under 55 years.

71% were from a White background, 16% from a Black and 6% from an Asian background.

60% were employed either full time (44%), or part time (16%). 15% were retired and 10% were students.

The town centre sample tends to have lower household incomes than the background London population.

45% of town centre visitors had access to a car that they could have used to travel to the town centre.

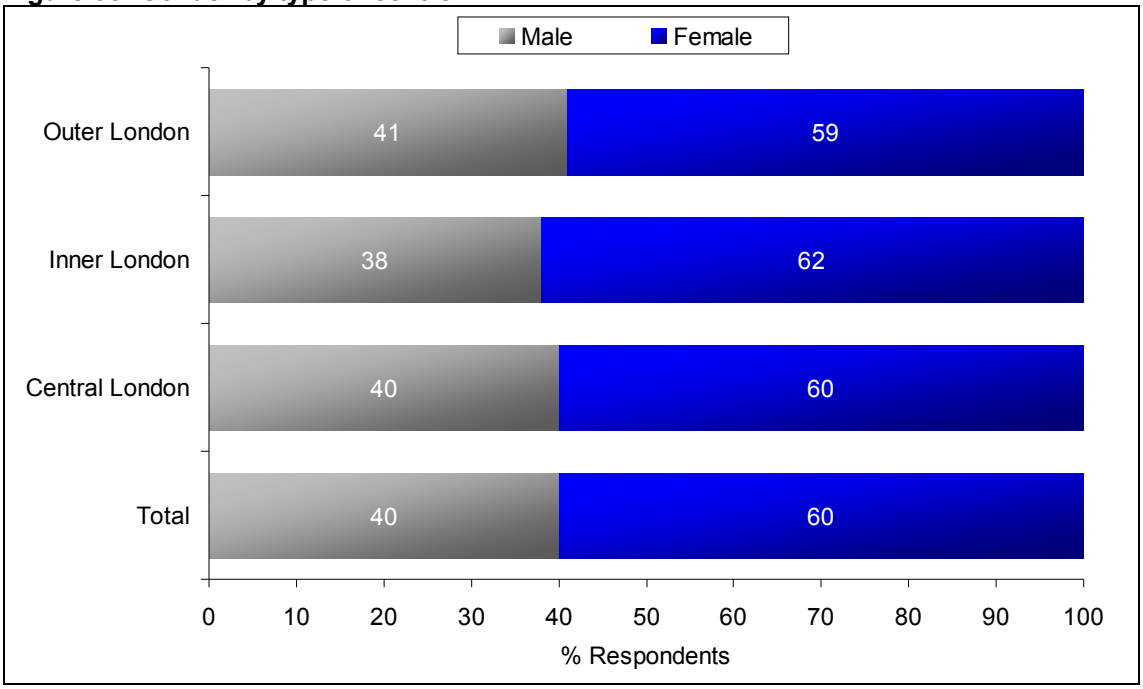
92% of town centre visitors live in London: 38% in Inner London Boroughs and 54% in Outer London Boroughs. 31% of visitors to Central London are from outside London including 11% from outside the UK.

11% had a long-term physical or mental disability which limits daily activities or work they could do. 1% used a wheelchair.

Gender

Overall, the majority of respondents were female (60%). There were marginally fewer men in the Inner London town centres than in either Central London or Outer London centres – see Figure 35.

Figure 35: Gender by type of centre



Weighted base: total 4,741, Central London 321, Inner London 1,903, Outer London 2,518

In Woolwich, Kingston, Bexleyheath and Strafford about two thirds were female (between 70% and 66%). In Harlesden 51% and in Camberwell 52% were female.

Details of gender by individual town centre are provided in Table 57 in Appendix B.

Comparison over time

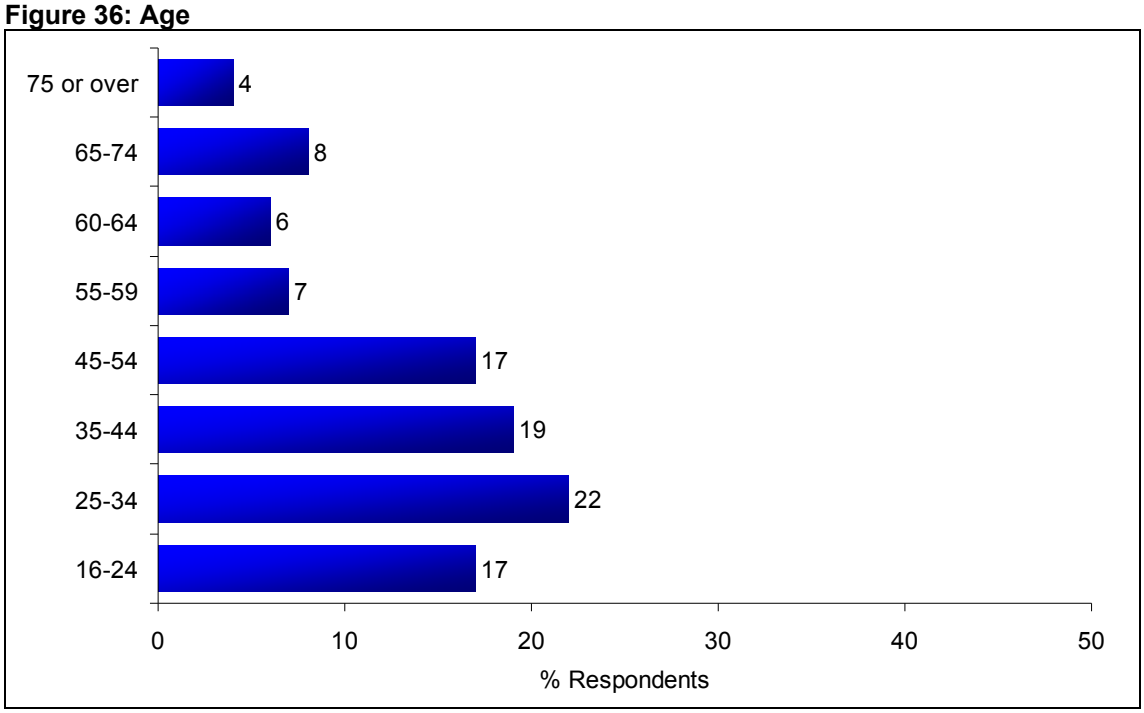
There has been a slight increase in female visitors.

	2011	2009	2004
Male	40%	42%	41%
Female	60%	58%	59%

Age

There was an even spread of ages for the overall sample, with similar proportions in the four age groups under 55 years.

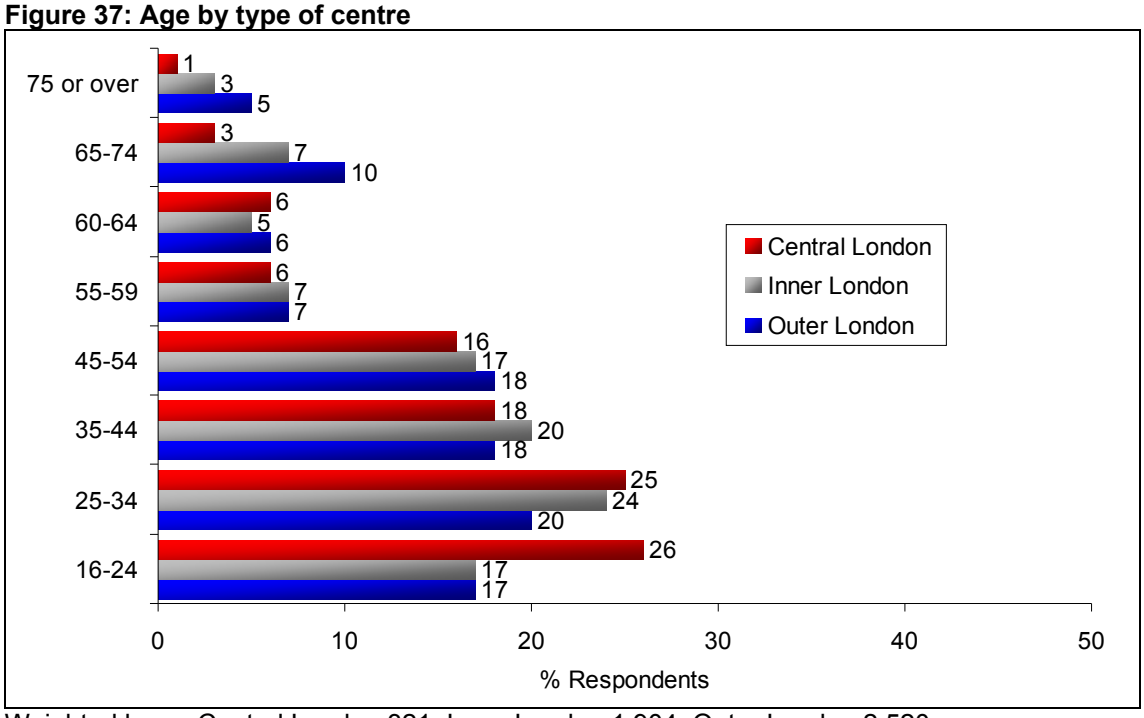
Figure 36: Age



Weighted base: Total sample 4,744

The Central London locations had a younger age profile than the Inner or Outer London town centres, with over half (51%) aged under 34 years old compared to 37% in Inner London town centres and 41% in Outer London town centres. See Figure 37.

Figure 37: Age by type of centre



Weighted base: Central London 321, Inner London 1,904, Outer London 2,520

In Bexleyheath, Bromley and Harrow the profile was older than in the other locations with over a quarter (26%-29%) aged over 60. The profile in Camberwell, Woolwich and Oxford Street/Regent Street is younger than the average with 8%-10% aged over 60.

Details of age by individual town centre are provided in Table 58 in Appendix B.

Comparison over time

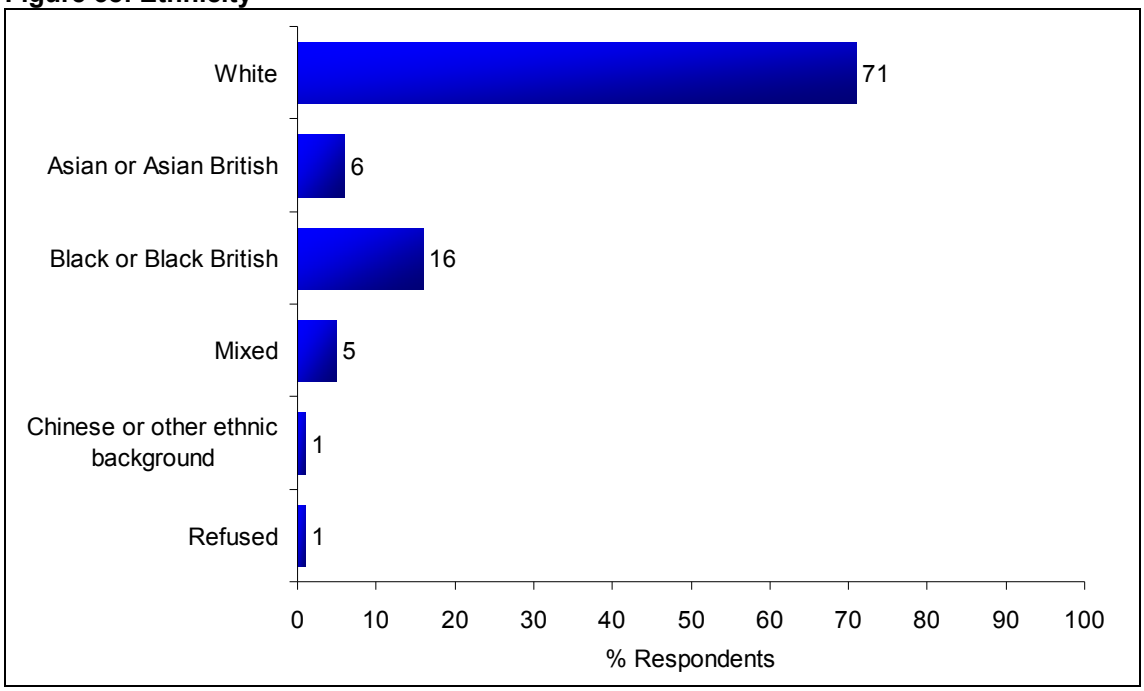
There is a slightly older age profile in 2011.

	2011	2009	2004
16-24	17%	23%	18%
25-34	22%	22%	22%
35-44	19%	20%	22%
45-54	17%	12%	38% aged 45 or older. Different age ranges used
55-64	13%	11%	
65-74	8%	7%	
75+	4%	3%	

Ethnicity

Over two thirds of the sample (71%) is from a White background, 16% from a Black and 6% from an Asian background as shown in Figure 38.

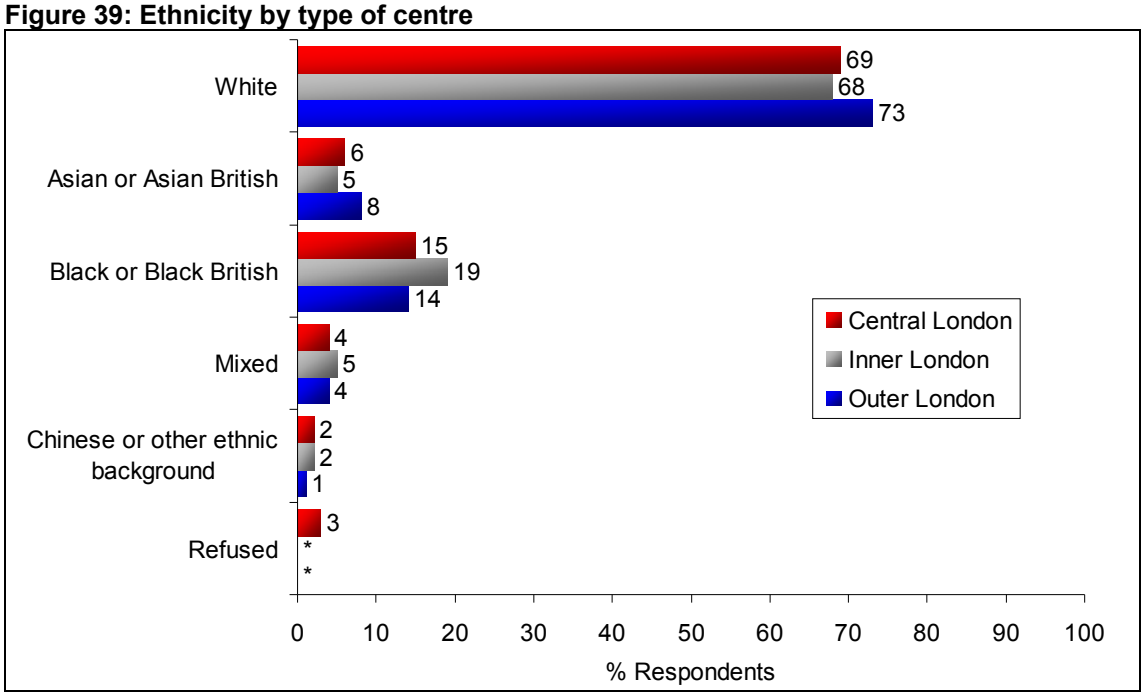
Figure 38: Ethnicity



Weighted base: Total sample 4,744

Analysis by type of town centres shows that the Outer London town centres have a higher proportion of White visitors – 73% compared to 68-69% elsewhere. There are more black visitors in Inner London town centres.

Figure 39: Ethnicity by type of centre



Weighted base: Central London 321, Inner London 1,904, Outer London 2,520
* = less than 0.5%

In Bexleyheath 94% were from a White background. At Bromley, Kingston, Clapham Junction, Croydon and Greenwich the proportion from a White background was also much higher than average (between 79% and 88%). Less than half in Harlesden (44%) were from a White background.

In Harlesden 39% of respondents were from a Black ethnic group as were 30% from Camberwell and 25% from Hackney. In Harrow 19% were from an Asian background.

Details of ethnicity by individual town centre are provided in Table 59 in Appendix B.

Comparison over time

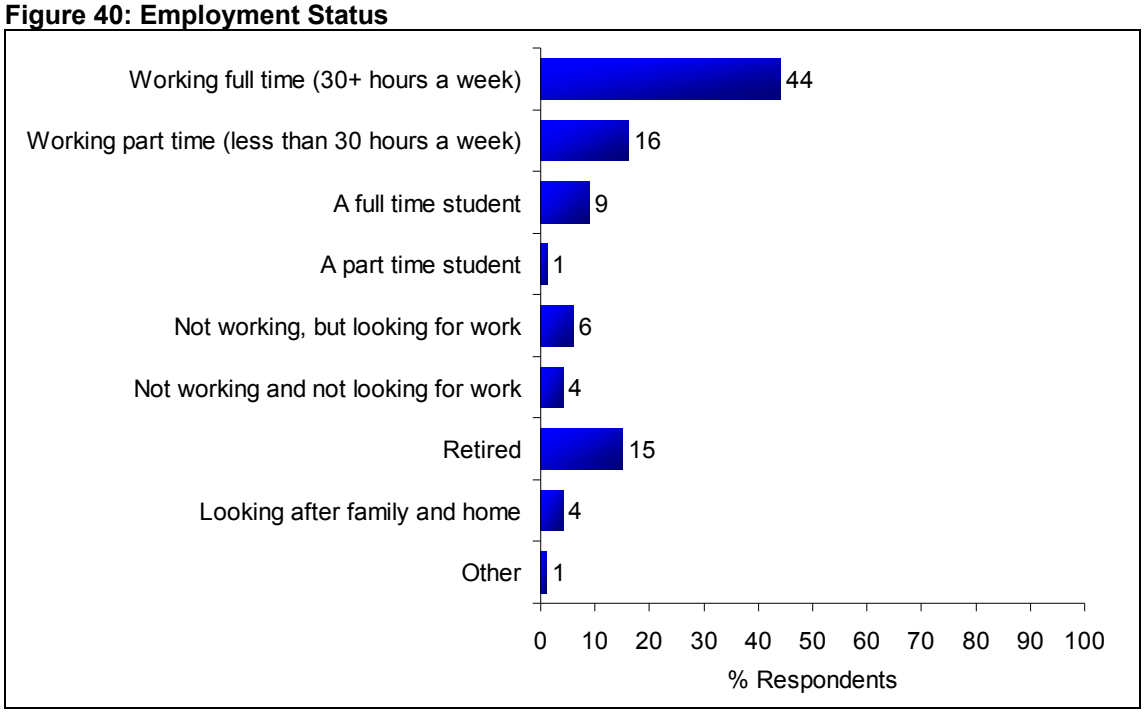
There are slightly more White visitors in 2011.

	2011	2009	2004
White	71%	69%	70%
Black or Black British	16%	16%	12%
Asian or Asian British	6%	9%	12%
Mixed	5%	4%	1%
Other	1%	1%	2%

Employment status

The majority of those who took part in the survey were employed either full time (44%), or part time (16%). A sixth were retired and a tenth were students.

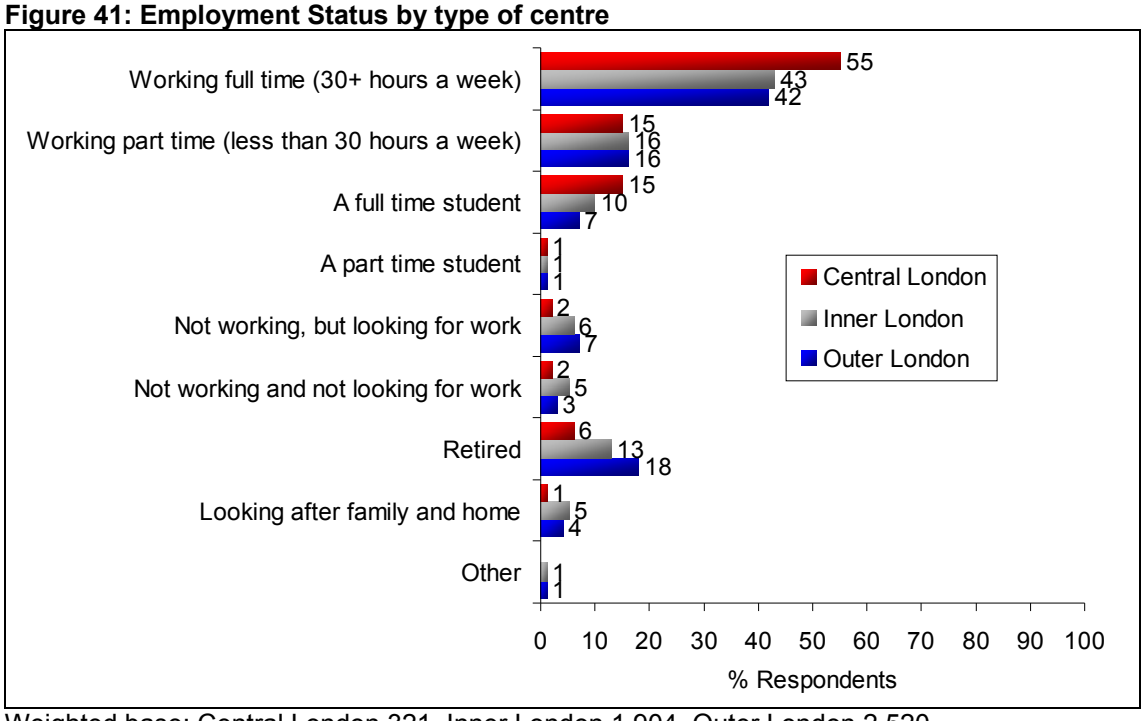
Figure 40: Employment Status



Weighted base: Total sample 4,742

Those in Central London town centres were much more likely to be employed full time than those in suburban town centres – 55% compared to 42% or 43%. Those in Central London were also less likely to be retired than those in suburban town centres. See Figure 41.

Figure 41: Employment Status by type of centre



Weighted base: Central London 321, Inner London 1,904, Outer London 2,520

The highest proportion of employed respondents was in Oxford Street/Regent Street (70%), Harlesden (67%), Ealing (66%) and Clapham Junction (64%). The lowest proportions were in Bexleyheath (45%) and Greenwich (52%).

There were high proportions of retired people in Bexleyheath (27%) and Bromley (26%).

The highest proportions of students were in Greenwich (21%), Kingston (16%) and Oxford Street/Regent Street (16%).

Details of employment status by individual town centre are provided in Table 60 in Appendix B.

Comparison over time

There were 5% more employed respondents in 2011 than in 2009 and 2004.

	2011	2009	2004
Working full time	44%	40%	41%
Working part time	16%	15%	14%
Other	40%	45%	45%

Household Income

Over half the sample (52%) said they were the chief income earner of the household. The proportion was higher in Inner London.

Table 30: Whether chief income earner of household by type of centre

	Total %	Central London %	Inner London %	Outer London %
Yes, respondent is Chief Income Earner	52	48	55	50
No, someone else	45	48	43	47
Refused	3	4	2	4
Weighted base	**4,732**	**320**	**1,900**	**2,513**

Annual household income was probed. Forty two per cent either refused to answer or said they did not know.

There was a fairly even income distribution across the income breaks shown to respondents.

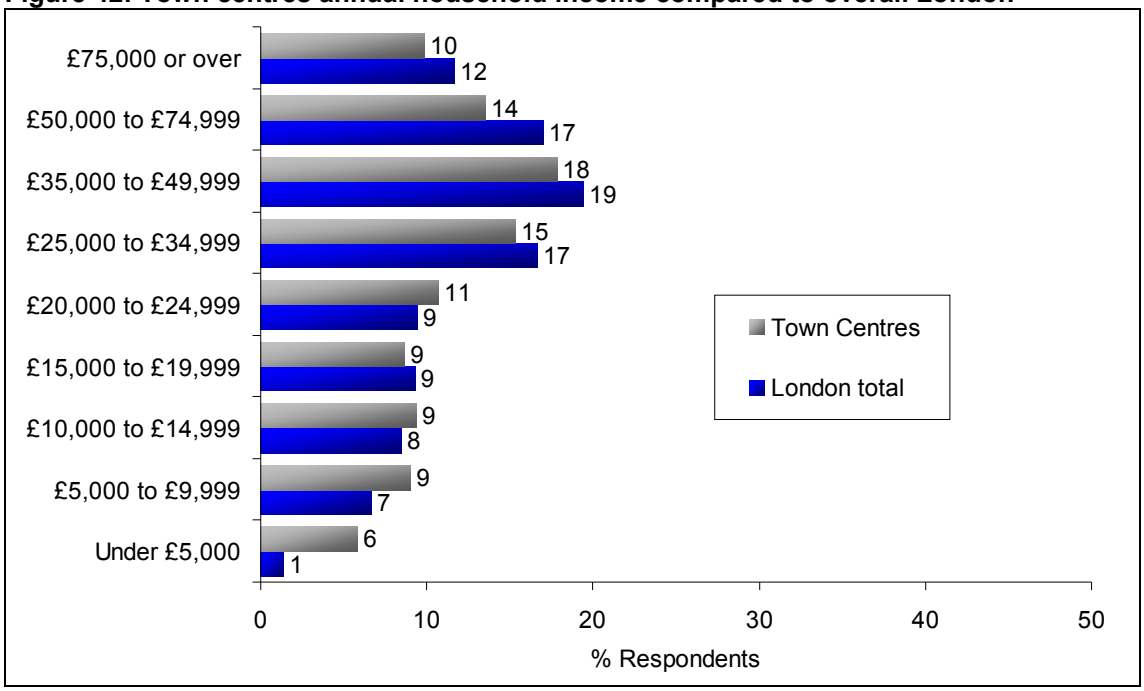
Table 31: Gross annual household income before deductions by type of centre

	Total %	Central London %	Inner London %	Outer London %
Under £5,000	3	1	4	3
£5,000-£9,999	5	3	6	5
£10,000-£14,999	5	3	6	5
£15,000-£19,999	5	2	5	5
£20,000-£24,999	6	4	6	6
£25,000-£34,999	9	7	9	8
£35,000-£49,999	10	11	9	11
£50,000-£74,999	8	12	7	8
£75,000-£99,999	3	6	2	3
£100,000 or over	3	7	3	2
Don't know	21	27	20	22
Refused	21	15	22	22
Weighted base	**4,714**	**313**	**1,902**	**2,500**

Details of income by individual town centre are provided in Table 61 in Appendix B.

When the survey income data (reweighted after excluding refusals and don't knows) is compared to overall London data (from Paycheck 2010[19]) it shows that the town centre sample tends to have lower household incomes than the background London population.

Figure 42: Town centres annual household income compared to overall London

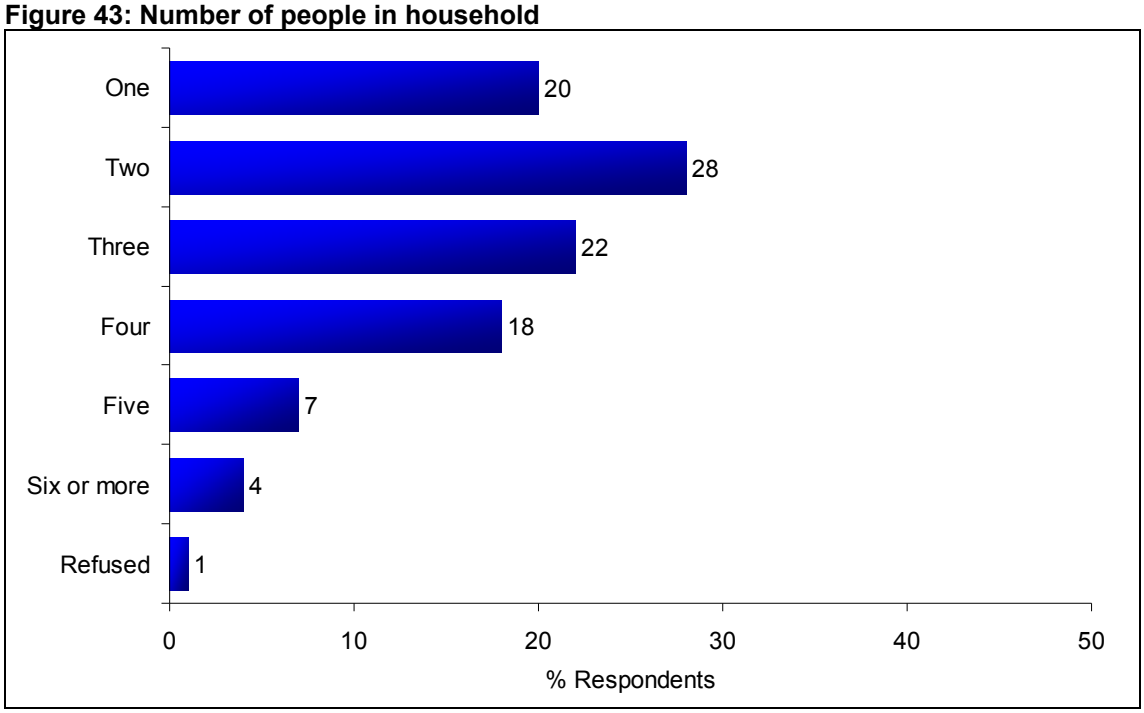


Household Size

The median household size was two, representing 28% of households. A fifth of respondents lived alone.

[19] http://www.london.gov.uk/sites/default/files/dmag/Update%2030-2010%20PayCheck%202010.pdf

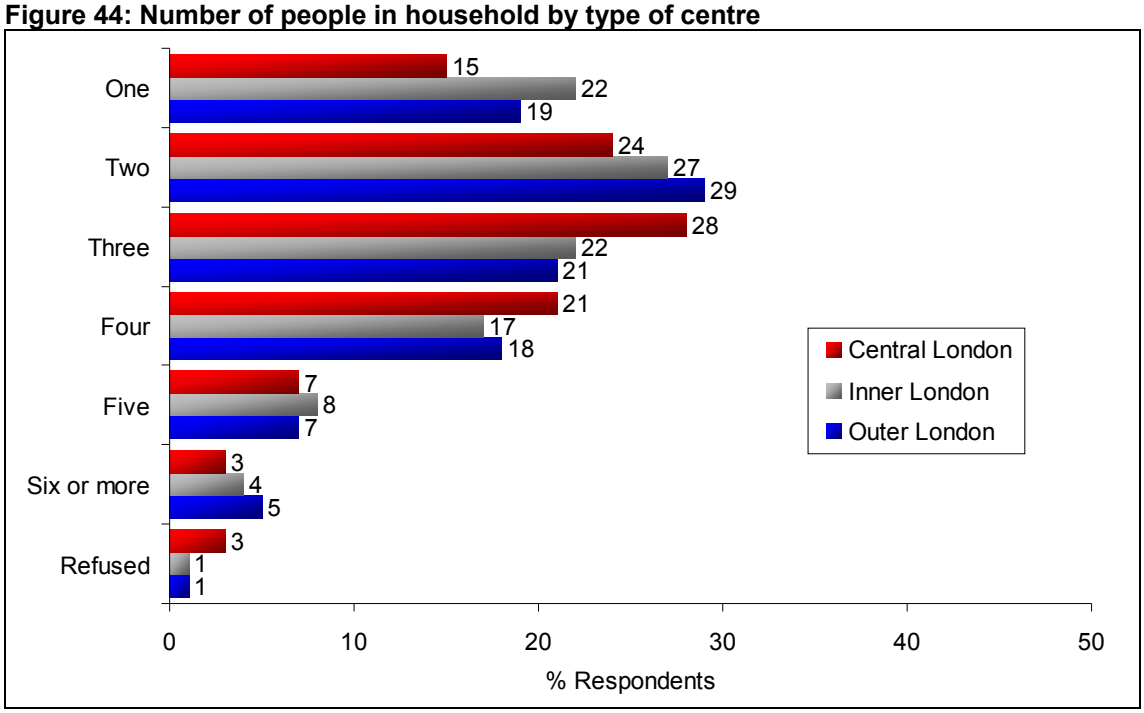
Figure 43: Number of people in household



Weighted base: Total sample 4,743

Visitors to the Inner London town centres were most likely to live alone: 22% compared to 19% for Outer London and 15% for Central London.

Figure 44: Number of people in household by type of centre



Weighted base: Central London 321, Inner London 1,904, Outer London 2,520

In Kingston (38%) and in Harlesden, Camberwell and Harrow (35% each) over a third lived in larger households of four or more people.

Over half of those in Clapham Junction (59%), Bexleyheath (57%), Greenwich (55%), Bromley (54%) and Croydon (53%) lived in one or two person households.

Details of household size by individual town centre are provided in Table 62 in Appendix B.

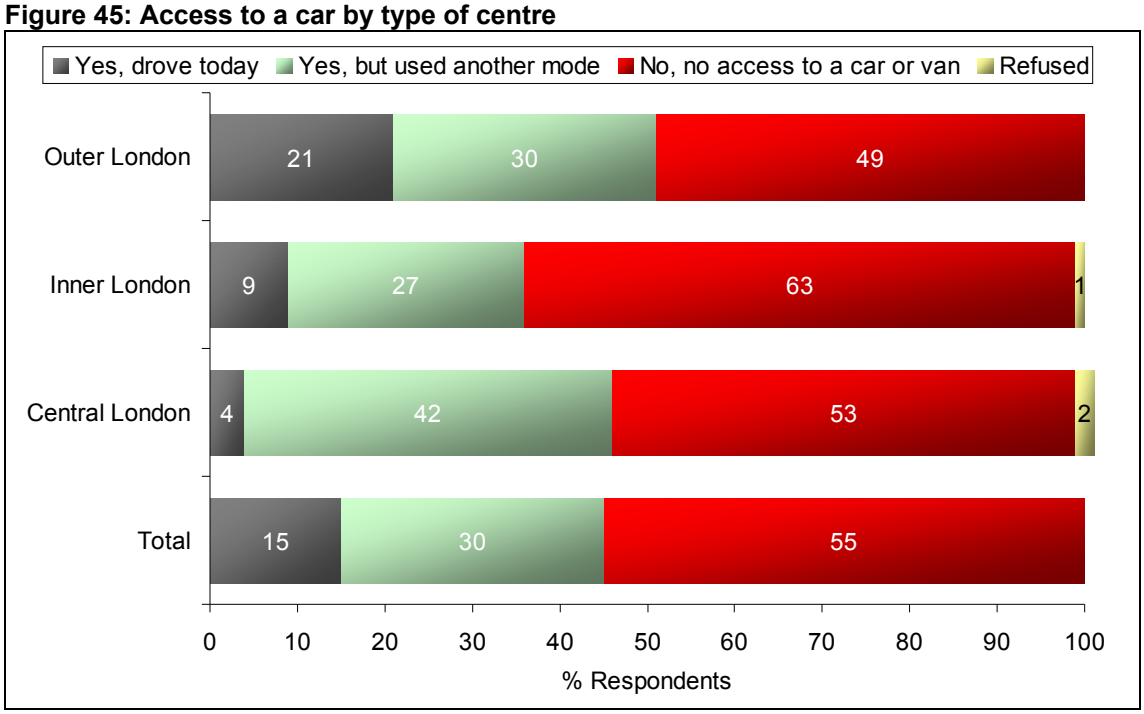
Access to a Car

Less than half the sample (45%) said they had access to a car that they could have used to travel to the town centre.

Car access was much higher in the Outer London town centres (51%) than the Inner London town centres (36%) or Central London (46%).

Just over one fifth (21%) of those from Outer London town centres drove on the day of interview compared with 9% for Inner London town centres and 4% for Central London.

Figure 45: Access to a car by type of centre



Weighted base: total 4,741, Central London 321, Inner London 1,902, Outer London 2,519

There was a particularly high level of access to a car in Kingston (61%), Harrow (60%) and Bromley (58%) and a high proportion had driven to the area in each case (28%-32%).

Car access in Stratford, Camberwell, Hackney and Woolwich was particularly low with 31% to 36% saying they had access to a car.

Details of access to a car by individual town centre are provided in Table 63 in Appendix B.

Comparison over time

There has been a decrease in car access over time.

	2011	2009	2004
Yes, drove today	15%	16%	22%
Yes, used other mode	30%	31%	28%
No access to a car	55%	52%	50%

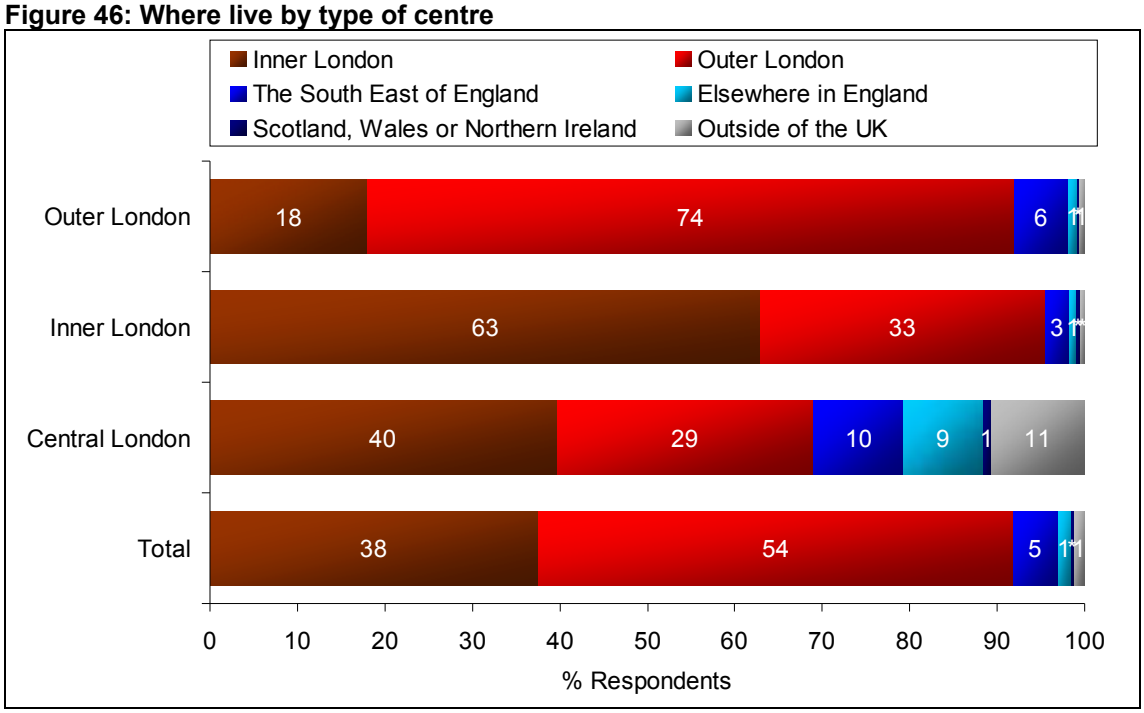
Where town centre visitor lives

Overall, 92% of town centre visitors lived in London: 38% in Inner London Boroughs[20] and 54% in Outer London Boroughs.

As would be expected the majority of visitors to Outer London town centres live in Outer London Boroughs (74%) and the majority of visitors to Inner London town centres live in Inner London Boroughs (63%).

Almost a third of visitors to Central London (31%) are from outside London including 11% from outside the UK.

Figure 46: Where live by type of centre



Weighted base: total 4,704, Central London 310, Inner London 1,897, Outer London 2,497
* = less than 0.5%

Details of where the respondent lives by individual town centre are provided in Table 67 in Appendix B.

[20] Camden, City of Westminster, Hackney, Hammersmith & Fulham, Haringey, Islington, Kensington & Chelsea, Lambeth, Lewisham, Newham, Southwark, Tower Hamlets and Wandsworth

Physical and Mental Impairments

Eleven per cent of the sample had a long-term physical or mental disability which limits daily activities or work they could do.

The percentage with a physical or mental impairment is much lower in Central London (3%) than in the inner and Outer London town centres (11%).

Table 32: Long term physical or other impairment which limits daily activities or the work that can be done, including problems due to age by type of centre

	Total %	Central London %	Inner London %	Outer London %
No, none	89	97	89	89
Mobility impairment	5	2	6	6
Visual impairment	1	0	*	1
Hearing impairment	1	1	1	1
Learning disability	1	*	1	1
Mental health condition	1	1	1	1
Serious long term illness	2	0	3	2
Other	1	*	1	1
Weighted base	**4,743**	**321**	**1,904**	**2,519**

* = less than 0.5%

Wheelchair Usage

Just one per cent of the sample uses a wheelchair.

Table 33: Use of wheelchair for travelling by type of centre

	Total %	Central London %	Inner London %	Outer London %
Yes	1	*	1	1
No	99	99	99	99
Weighted base	**4,743**	**321**	**1,904**	**2,519**

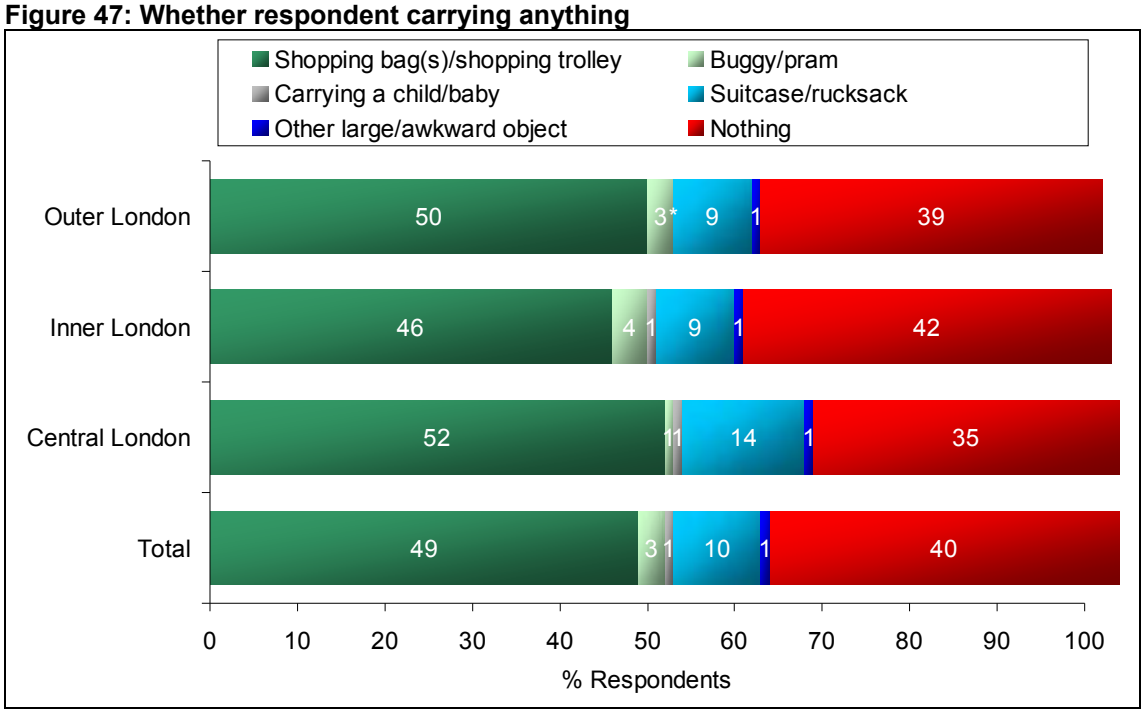
* = less than 0.5%

Wheelchair use by individual town centre is shown in Table 65 in Appendix B.

Whether carrying anything

About half the town centre visitors were carrying shopping bags or using a shopping trolley (49%) and a tenth had a suitcase or rucksack.

Figure 47: Whether respondent carrying anything



Weighted base: total 4,741, Central London 321, Inner London 1,902, Outer London 2,519
* = less than 0.5%

Details of what was carried by individual town centre are provided in Table 66 in Appendix B.

4. CYCLE RESULTS

4.1 Introduction

This chapter sets out the findings for the cycle booster sample.

The cycle boosters were undertaken at the following seven town centres:

- Bexleyheath
- Bromley
- Croydon
- Ealing
- Harrow
- Kingston
- Oxford Street/Regent Street.

In total 362 interviews were undertaken.

Detailed tables on demographics, mode of access, frequency of visit, main purpose, spend and town centre improvements by the seven centres are shown in Appendix D.

4.2 Purpose of Visit

The majority of cyclists (70%) do not live or work within 10 minutes walk of the town centre but 19% live in the area, 7% work in the area and 4% both live and work within 10 minutes walk of the town centre.

Bromley, Harrow and Kingston were the locations most likely to attract visitors from a wider catchment area (84%, 78% and 76% respectively from more than 10 minutes walk away). By contrast, 48% of those visiting Bexleyheath lived or worked within 10 minutes of the town centre.

Reasons for visiting town centre

All visitors were recruited on the basis that they were shopping, using a service or doing both in the centres[21]. Shopping was the predominant purpose and the main reason for visiting for 69% of cyclists. Eating and drinking out was also important being mentioned by 20% but was only the main purpose for 6%. All reasons and the main reasons for visiting the area are as shown in Table 34.

[21] Although at Oxford Street those only working or living there were also in scope

Table 34: Reasons for visiting town centre

	All purposes %	Main purpose %
Shopping	69	52
Using service	23	15
Eating/drinking out	20	6
Work here	10	8
Other social/leisure	9	5
Using public amenity	8	4
Window shopping	6	*
Live here	5	2
Personal business	4	3
General recreation	4	1
Visiting friends and relatives	4	3
Travelling through the area	3	1
Delivering goods	1	1
Dropping off/picking up friend or relative	1	0
Base	**362**	**362**

The main reason for visiting were similar for all areas as shown in Table 85 in Appendix D. However, those visiting Ealing and Croydon were more likely to be there for shopping compared with other centres (86% and 75% of visitors respectively compared to between 61% and 67% for the other town centres).

A third were eating or drinking out in Bexleyheath and only 6% were doing so in Harrow compared to between 15% and 26% elsewhere.

In terms of the main reason for being in the centre the most notable variations from the average were in Ealing where a higher proportion were shopping (73%) and in Bromley were the lowest proportion was shopping (37%).

4.3 Time Spent in Town Centre

The majority (65%) said they were planning to spend at least one hour in the town centre with 48% spending between one and three hours.

Table 35: Time spent in town centre

	Total %
Under 5 minutes	1
5-14 minutes	3
15-29 minutes	7
30-59 minutes	25
1-3 hours	48
More than 3 hours	17
Base	**362**

Those in Bexleyheath were planning on spending the most time in the town centre (an average of 1.9 hours compared to between 1.6 and 1.8 for the other town centres).

4.4 Frequency of Visiting

The majority of cyclists visit the town centre on a regular basis with 81% visiting the area once a week or more often as shown in Table 36.

Table 36: Frequency of visiting town centre

	Total %
5 or more days a week	25
3 or 4 days a week	20
2 days a week	17
Once a week	19
Once a fortnight	11
About once a month	5
Less than once a month	2
First time	2
Base	**362**

Cyclists in Oxford Street/Regent Street visit least frequently: 60% once a week or more often compared to between 75 and 90% elsewhere.

Bexleyheath is the centre visited most frequently (94% visit once a week or more often) and Kingston also has a high proportion of frequent visitors (90% visit once a week or more).

4.5 Mode of Transport

Why Cycle used

All reasons and the main reason for choosing to travel by cycle to access the area are shown in Table 37.

Of all reasons given, over half of those who cycled cited speed (59%) and low cost (51%). Half said they need/enjoy the exercise. The main reasons given for cycling were speed (27%) and need/enjoy the exercise (26%).

Table 37: All reasons and main reason for using cycle rather than any other method of transport to access area

	All reasons %	Main reason %
Quicker	59	27
Cheaper/less expensive	51	18
Need/enjoy exercise/healthy	50	26
Easier/more convenient	31	7
More direct	28	3
Avoids parking difficulties	27	3
More relaxing/comfortable	18	6
Live very close by	14	2
Going to more than one place	13	1
No car/can't drive	9	1
Weather issues	9	3
Had heavy bags/shopping to carry	4	1
Safer	4	*
Avoid the congestion charge	4	*
Only method possible	3	1
Travelling with children	1	0
Base	**362**	**362**

Note: for all reasons more than one answer may be given, so percentages add up to more than 100%

* = less than 0.5%

Other modes of transport sometimes used

Bus was the most used 'other' mode with 56% of cyclists mentioning it. Over a third (35%) of bicycle users also sometimes walk to the town centres and 27% use a private vehicle.

Table 38: Other modes used to town centre

	Total %
Bus	56
Walked	35
Car/van/lorry	27
Train	16
Tube	11
Taxi/minicab	9
Motorbike/moped/scooter	4
Barclays Cycle Hire	*
Other	*
Base	**362**

* = less than 0.5%

Frequency of mode use

Under a quarter (23%) who cycled to the town centre cycle there five or more days a week.

Table 39: Frequency of using mode to travel to this area

	Total %
5 or more days a week	23
3 or 4 days a week	18
2 days a week	16
Once a week	19
Once a fortnight	10
About once a month	6
Less than once a month	4
First time	4
Base	**362**

The mean weekly frequency of cycling to the area of the town centre is 2.2 times. Those cycling to Harrow are the most frequent visitors by cycle (2.3 times a week on average) and those cycling to Croydon and Oxford Street/Regent Street are the least frequent visitors by cycle (1.9 times a week on average).

4.6 Attitudes and Use of Bus

Frequency buses used to travel in town centre

Over two thirds (68%) sometimes used the bus to travel in the area of the town centre, even if they did not do so on the day of interview.

Over a third (36%) had used bus in the area at least once a week. Just under a third (32%) said they never used the bus in the area.

Bus use decreased slightly compared to the claimed frequency of use of twelve months ago as shown in Table 40. There was a 2% decrease in those that travel by bus at least once a week (from 38% to 36%), and a 5% increase in those never using buses (from 27% to 32%).

Table 40: Change in frequency of bus use in area

	Now %	12 months ago %
5 or more days a week	2	3
3 or 4 days a week	9	9
2 days a week	11	12
Once a week	14	14
Once a fortnight	10	7
About once a month	9	9
Less than once a month	12	17
Never	32	27
Base	**362**	**362**

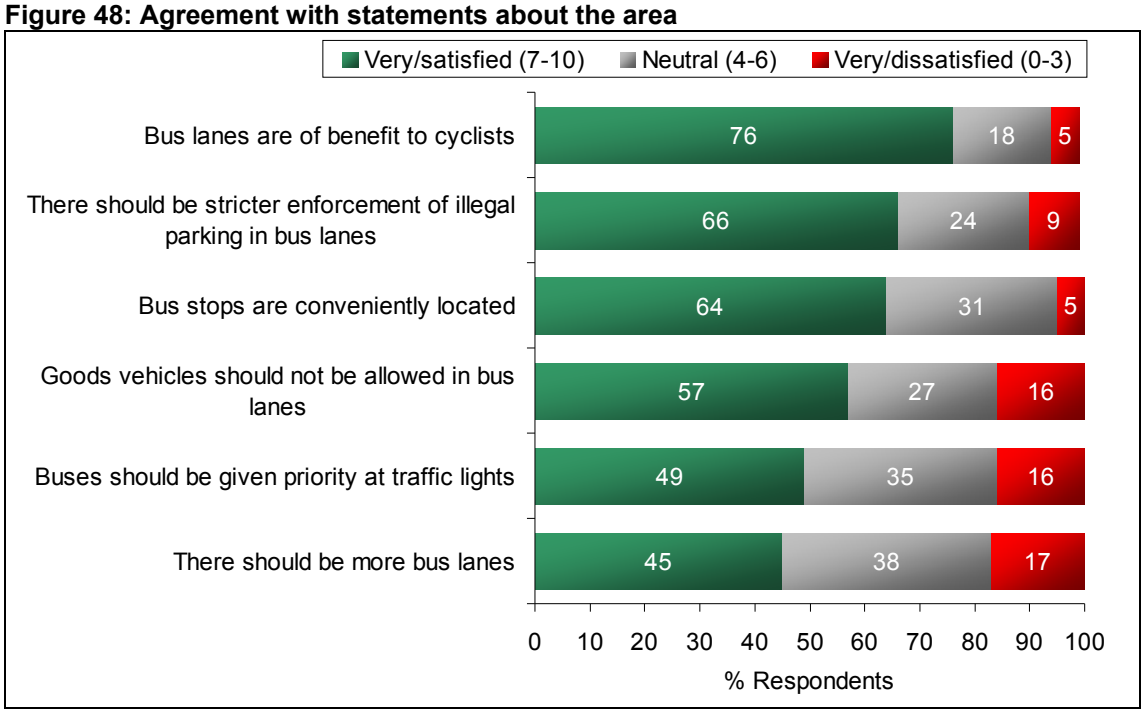
Attitudes towards Bus Lanes and Bus Priority Measures

Visitors by cycle were asked their opinion on a number of aspects relating to bus lanes and bus priority measures. Generally, they were in support of all the measures.

There was strong agreement that bus lanes are of benefit to cyclists (mean score 7.8), that there should be stricter bus lane enforcement (7.4), that bus stops are conveniently located (7.2) and for goods vehicles not to be allowed in bus lanes (6.7).

There was least support for buses being given priority at traffic lights (6.2) and there being more bus lanes (6.0).

Figure 48: Agreement with statements about the area



Base: all cyclists: 362

Encouraging More Bus Use

Over half (62%) mentioned some improvements that could encourage (greater) bus use. Lower fares (28%), faster journeys (22%), more direct bus routes (17%) and more reliable buses (16%) were the most frequently suggested ways in which bus use could be encouraged as shown in Table 41 below.

When asked for the main factor, the top three single factors that would encourage greater use of the bus were lower fares (19%), faster journey (10%) and more regular buses (7%).

Table 41: Factors that would encourage use of buses more often

	All respondents	
	All mentions %	Main factor %
Nothing	38	38
Lower fares	28	19
Faster journey	22	10
Direct bus route	17	6
More reliable buses	16	5
More regular/frequent buses	15	7
Reduce number of cars on the road/less congestion	9	2
More comfortable journey	8	2
Cleaner buses	7	*
Greener buses	7	1
Make children behave/school buses	6	*
Greater priority given to buses	5	1
More seats on buses/less crowded buses	5	1
More information about buses	5	2
Bus stop nearer home/destination	4	1
Safer buses	4	1
Stricter enforcement of illegal parking in bus lanes	3	1
More shelters at bus stops	3	0
More seating at bus stops	2	1
Improved ease of getting on and off buses	1	0
Other	1	1
Base	**362**	**362**

* = less than 0.5%

4.7 Encouraging Cycling

Cyclists were shown a card with the following list of potential improvements and asked which would encourage them to cycle more often in the area:

- (More) cycle lanes on the roads
- (More) dedicated cycle paths
- Less road traffic
- Free on-road cycle training
- Bicycle hire scheme
- (Better) bicycle parking facilities in this area
- (Better) bicycle parking facilities at / near your home
- None of these / nothing.

Over nine tenths (91%) of cyclists mentioned at least one thing that might encourage them to cycle more often in the area.

The main improvements were ‘more dedicated cycle paths’ (59%), ‘more cycle lanes on the roads’ (56%) ‘(Better) bicycle parking facilities in this area’ (37%) and ‘less road traffic’ (34%).

Table 42: Things which would encourage cycling more often in this area

	Total %
(More) dedicated cycle paths	59
(More) cycle lanes on the roads	56
(Better) bicycle parking facilities in this area	37
Less road traffic	34
(Better) bicycle parking facilities at/near your home	24
Bicycle hire scheme	16
Free on-road cycle training	9
None of these/nothing	8
Don’t know	1
Base	**362**

Table 43 shows the data by location.

‘(More) dedicated cycle paths’ was mentioned most often in Harrow (71%).

‘(More) cycle lanes on the roads’ was mentioned most often in Bexleyheath (67%) and Oxford Street/Regent Street (66%).

‘Less road traffic’ was mentioned most often in Oxford Street/Regent Street (51%).

‘Bicycle hire scheme’ was mentioned by 38% in Bexleyheath and 25% in Croydon. Thirteen per cent mentioned ‘Bicycle hire scheme’ in Oxford Street/Regent Street even though it already exists in central London.

Table 43: Things which would encourage cycling more often in this area by town centre

	% Croydon	% Bexleyheath	% Bromley	% Ealing	% Harrow	% Kingston	% Oxford St/ Regent St
(More) dedicated cycle paths	52	54	65	55	71	42	66
(More) cycle lanes on the roads	58	67	39	51	62	46	66
(Better) bicycle parking facilities in this area	35	52	16	16	49	40	47
Less road traffic	29	42	33	18	29	36	51
(Better) bicycle parking facilities at/near your home	25	44	10	6	30	14	40
Bicycle hire scheme	25	38	6	6	14	10	13
Free on-road cycle training	8	10	2	8	14	8	8
None of these/nothing	8	0	16	18	3	8	2
Don’t know	0	2	0	2	0	0	0
Base	**48**	**48**	**51**	**49**	**63**	**50**	**53**

4.8 Attitudes towards Town Centres

Improvements to Town Centre

Cyclists were asked in what way the area could be improved. The suggestion most often mentioned was 'improve cycle facilities' (mentioned by 42%).

Other important improvements were 'more pleasant/greener environment' (27%), 'more leisure facilities' (23%), 'better range of shops' (22%), 'less traffic' (22%) and 'cleaner streets' (20%).

Ten per cent of cyclists thought that there was nothing that could be done to improve the centres, with an additional 2% not knowing what improvements there could be.

When asked what was the single most important improvement to be made, 'improve cycle facilities' was the main priority as shown in Table 44.

Table 44: Priorities for improvements to the area

	All mentions %	Most important %
Nothing	10	10
Improve cycle facilities	42	21
More pleasant/greener environment	27	7
More leisure facilities	23	5
Better range of shops	22	9
Less traffic	22	9
Cleaner streets	20	4
Improve shops/better quality shops	19	4
Reduce pollution	19	3
More public spaces	18	4
Longer shop opening hours	17	6
Remove undesirable element/more policing	13	4
More shops	9	3
More/easier parking	9	3
High street should be pedestrianised	8	1
Better bus service	6	1
Improve pedestrian environment	5	1
Improve access to bus stop locations	3	1
Other	2	2
Don't know	2	2
Base	**362**	**362**

'Improve cycle facilities' was the main priority at Harrow (38%), Bromley (25%), Kingston (22%) and Croydon (15%) and the second most important priority at Oxford Street/Regent Street (21%) and Bexleyheath (15%).

'Less traffic' was the main improvement mentioned at Oxford Street/Regent Street (32%). At Ealing the main improvement mentioned was 'better range of shops' (31%).

At Bexleyheath the main improvement was 'longer shop opening hours' (15%).

Safety

The perceived safety of the town centre neighbourhood in day time and at night was explored. Overall, 68% of cyclists felt very safe and 28% felt fairly safe during the day.

A tenth of cyclists didn't go out during the evening/after dark in the town centre neighbourhood. Of those who did, the feeling of safety fell markedly with 37% saying they felt very safe and 42% fairly safe.

A positive balance of 19% of cyclists had seen more uniformed police officers in the local neighbourhood in the past year: 31% more, 12% less.

Over three quarters (83%) of cyclists felt very or fairly safe when cycling in the town centre neighbourhood. Four per cent felt very unsafe.

Table 45: Feeling of safety of when cycling in the neighbourhood

	Total %
Very safe	40
Fairly safe	43
A bit unsafe	13
Very unsafe	4
Base	**362**

Cyclists in Oxford Street/Regent Street were most likely to feel unsafe (31% a bit or very unsafe).

Cyclists in Kingston and Bromley were most likely to feel very safe (60% and 59% respectively compared to between 21% and 48% elsewhere).

Table 46: Feeling of safety of when cycling in the neighbourhood by town centre

	% Croydon	% Bexleyheath	% Bromley	% Ealing	% Harrow	% Kingston	% Oxford St/ Regent St
Very safe	29	21	59	39	48	60	23
Fairly safe	52	68	24	49	40	28	46
A bit unsafe	13	11	8	12	8	10	27
Very unsafe	6	0	10	0	5	2	4
Base	**48**	**47**	**51**	**49**	**63**	**50**	**52**

4.9 Use of Other Shopping Centres

Over two thirds of town centre visitors (64%) go to other shopping centres in and around London. The most visited other shopping centres[22] were Westfield (26%) and Bluewater (24%).

[22] From a list shown to respondents

Table 47: Whether go to shopping centres in and around London

	Total %
No	36
Westfield	26
Bluewater	24
Croydon	22
Brent Cross	14
Lakeside	14
Canary Wharf	10
Elephant & Castle	9
Whiteleys	7
Victoria Place	5
Aylesham Shopping Centre	1
Base	**362**

4.10 Oxford Street/Regent Street

There were specific questions asked for respondents at Oxford Street/Regent Street covering possible disruption because of Crossrail works, the diagonal crossing at Oxford Circus and why they visit the area.

Why visit Oxford Street

The main reasons why cyclists at Oxford Street were visiting Oxford Street rather than going somewhere else were because they worked near there (36%) and because of its shopping facilities: 32% were visiting a particular shop and 17% considered to be the best shopping area.

Table 48: Why visiting Oxford Street area today rather than going somewhere else

	Total %
Work near here	36
Visiting a particular shop	32
Oxford Street is best shopping area	17
Meeting people here	15
Live near here	13
As a 'day out'/'trip into town'	11
More/better/bigger range of shops	8
Visiting other places in London as well	8
Had to be in Central London for other reason	8
Longer shop opening hours	6
Visiting a particular leisure facility	6
To do something different/special	4
Easy for me to travel to and from	4
More leisure facilities, eg restaurants, bars, cinemas etc	2
Other	2
Base	**53**

Awareness of changes to travel around Tottenham Court Road

Just over half (51%) of cyclists at Oxford Street were aware of the changes to travel around Tottenham Court Road.

Awareness for reasons for diversions and travel changes

Of those who were aware of the changes to travel around Tottenham Court Road 63% knew it was because of building rail/Crossrail station (32% of all cyclists at Oxford Street).

Other reasons mentioned included:

- Improving Underground station 44%
- Transport works (unspecified) 22%
- New shops/shopping centre development 19%
- Building works (unspecified) 15%
- Utility works (eg electricity, gas, water) 7%
- Improving pavements/pedestrian facilities 7%
- Improving bus facilities/bus routes 4%
- Improving road layout/better roads 4%

Eleven per cent said they didn't know.

Impact of travel changes on travel

Only 11% of cyclists at Oxford Street/Regent Street said they were affected by the travel changes around Tottenham Court Road.

Of the minority (6 cyclists) that were affected, four changed their cycling route. The other two didn't drive or catch a bus.

Diagonal Crossing

Over half the cyclists (51%) at Oxford Street/Regent Street had used the diagonal crossing at Oxford Circus.

There were very high levels of satisfaction with both the safety and ease of crossing the road on the diagonal crossing. The means scores (where 0 = very dissatisfied and 10 = very satisfied) were:

- The ease of crossing the road 8.7
- The safety of crossing the road 8.4

4.11 Shopping and Expenditure in the Area

A wide range of services and shops were visited by respondents. Thirty per cent of the cyclists visiting the town centres were shopping for groceries and food or for clothes or footwear as shown in Table 49.

Other items or services that were mentioned by 10% or more were:

- Services (eg hairdressers) 25%
- Café or restaurant 15%

- Take away food 14%
- Stationery, books, CDs, DVDs, leisure goods 14%
- Other household goods 10%.

Table 49: Range of things shopped for and services used

	Total %
Food/groceries	30
Clothing or footwear	30
Services	25
Eating in a café or restaurant	15
Take-away food	14
Stationery/books/CDs/DVDs/leisure goods	14
Other household goods	10
Pharmaceuticals/toiletries	8
Confectionery, tobacco, newspapers	7
Luxury goods	5
Major household goods	5
Having a drink in a pub or wine bar	5
Going to cinema, theatre, concert, leisure facility etc	5
Wine, beer, spirits	3
Travel Pass/mobile top up/phonecard	3
Other	2
Base	**357**

Food/grocery shopping was most mentioned at three of the town centres: Bromley (27%), Ealing (47%), and Kingston (36%) and least mentioned at Oxford Street/Regent Street (8%).

Clothing or footwear shopping was most mentioned at two town centres: Croydon (35%) and Oxford Street/Regent Street (50%).

Services was mentioned at two town centres: Bexleyheath (40%) and Harrow (33%).

4.12 Average Spend

Visitors were asked how much they anticipated spending in the centre during their visit and also how much they spend on average per visit. An average total spend per week was then calculated based on the frequency of visiting the centre. It should be noted that respondents were asked how much they had spent according to broad bands of expenditure. In order to calculate the average spend figures mid point values were applied to the bands and full details of these values are provided in Appendix C.

Overall the average spend was £28 on the day of interview which is the same as the usual spend per visit (£28). The average spend per week was £70 and the average spend per month was £278. This is considerably higher than the £188 for the non booster cycle sample.

The reasons for the differences in average spend between the cycle booster sample and cyclists in the core sample were investigated.

It appears that the majority of the difference is explained by a number of cyclists in the booster sample who give very high average spend per month responses: 4% over £1,000

compared to none for the core sample. If we remove responses over a £1,000, the average monthly spend for the cycle booster drops to £208 from £278 which is much closer to the £188 for the core sample.

The other potential reason for the discrepancy is a different sampling approach. The core cyclist sample was drawn randomly as part of an overall town centre visitor sample whereas the booster sample was more targeted. This may have led to higher spending cyclists being sampled in the booster sample.

Oxford Street/Regent Street (£50), Croydon (£33) and Ealing (£32) were the town centres with the highest levels of spend on the day of interview.

Visitors to Bromley (£20) and Harrow (£21) spent the least.

Those visiting Kingston spend the most on average per week (£92), with those visiting Croydon (£81), Bexleyheath (£75) and Oxford Street/Regent Street (£74) also having high weekly spends. Those visiting Bromley (£34) spent least on average per week.

4.13 Online Shopping

Two thirds of cyclists visiting the town centres shop by internet.

The highest levels of internet shopping were by visitors to Oxford Street/Regent Street (77%) and the lowest by visitors to Harrow (51%).

The main goods purchased online are:

- Books/CDs/DVDs/leisure goods 71%
- Tickets 49%
- Clothing or footwear 43%
- Other household goods 26%
- Major household goods 23%
- Luxury goods 21%
- Food/groceries 18%

4.14 Respondent Characteristics

Gender

Seventy per cent of cyclists visiting the town centres were male. In Ealing only 43% were male.

Age

Almost half (48%) of the cycle sample was aged under 34 years old.

Table 50: Age

	Total %
16-24	25
25-34	23
35-44	19
45-54	17
55-59	6
60-64	3
65-74	4
75 or over	3
Base	**362**

Ethnicity

Four fifths of the cycle sample is from a White background.

Table 51: Ethnicity

	Total %
White	80
Asian or Asian British	7
Black or Black British	9
Mixed	3
Chinese or other ethnic background	1
Base	**362**

Employment status

Two thirds of the cycle sample were employed either full time (47%), or part time (19%). Thirteen per cent were students.

Table 52: Employment Status

	Total %
Working full time (30+ hours a week)	47
Working part time (less than 30 hours a week)	19
A full time student	11
A part time student	2
Not working, but looking for work	7
Not working and not looking for work	2
Retired	9
Looking after family and home	2
Other	1
Refused	1
Base	**362**

Household Income

Over half the sample (57%) said they were the chief income earner of the household.

Annual household income was probed. Thirty eight per cent either refused to answer or said they did not know.

There was a fairly high income distribution with 29% having annual household incomes of £35,000 or over.

Table 53: Gross annual household income before deductions

	Total %
Under £5,000	4
£5,000-£9,999	4
£10,000-£14,999	6
£15,000-£19,999	4
£20,000-£24,999	4
£25,000-£34,999	11
£35,000-£49,999	12
£50,000-£74,999	10
£75,000-£99,999	3
£100,000 or over	4
Don't know	17
Refused	21
base	**362**

Household Size

The median household size was two, representing 25% of households. Nineteen per cent of respondents lived alone.

Table 54: Number of people in household

	Total %
One	19
Two	25
Three	20
Four	21
Five	11
Six or more	3
Refused	2
base	**362**

Access to a Car

Half the cycle sample (50%) said they had access to a car that they could have used to travel to the town centre.

Physical and Mental Impairments

Four per cent of the cycle sample had a long-term physical or mental disability which limits daily activities or work they could do.

Table 55: Long term physical or other impairment which limits daily activities or the work that can be done, including problems due to age

	Total %
No, none	96
Mobility impairment	1
Visual impairment	1
Hearing impairment	1
Mental health condition	1
Serious long term illness	1
Other	*
Base	**362**

* = less than 0.5%

Whether carrying anything

Almost two thirds (65%) of cyclist town centre visitors were carrying something:

Table 56: Whether respondent carrying anything

	Total %
Nothing	35
Suitcase/rucksack	40
Shopping bag(s)/shopping trolley	25
Other large/awkward object	1
Base	**362**

APPENDIX A

Paper Version of Questionnaire

LOCATION:

1 Camberwell
2 Clapham Junction
3 Croydon
4 Bexleyheath
5 Bromley
6 Ealing
7 Greenwich
8 Hackney
9 Harlesden
10 Harrow
11 Kingston
12 Oxford Street/Regent Street
13 Stratford
14 Wood Green
15 Woolwich

Town Centres Survey 2011

EP:
1
2
3

Interviewer name: **Interviewer no:** **Date:** **Time:**

Introduction

I am conducting a survey on behalf of Transport for London on travel to this area and use of the town centre. Could you spare a few minutes to answer some questions please? Any answer you give will be treated in confidence in accordance with the Code of Conduct of the Market Research Society.

Q1. Can I just check – do you or does anyone in your household work in any of the following occupations? **SHOWCARD 1**

1 Advertising ..... 1 **THANK AND CLOSE**
2 Journalism ..... 1 **THANK AND CLOSE**
3 London Underground / London Transport / TfL ..... 1 **THANK AND CLOSE**
4 Market research ..... 1 **THANK AND CLOSE**
5 None of the above ..... 1 **GO TO Q2**

Q2. Have you, or will you, be using any of the shops or facilities in this area, or are you just passing through, for example on your way to work?

1. Yes, have/will be using shops/facilities
2. No, just passing through **IF LOCATION = 12 CONTINUE; OTHERWISE THANK AND CLOSE**

Q3. All the questions I am going to ask you refer to the area shown on this map. **SHOW MAP** Please look at this card and tell me which of these best describes your reasons for visiting this area on this occasion today? **SHOWCARD 2. CODE ALL MENTIONED IN Q3 BELOW**

AT LEAST ONE OF 1 – 10 MUST BE CODED UNLESS LOCATION IS OXFORD STREET/REGENT STREET WHERE 11 AND 12 CAN ALSO BE ONLY CODE

		Q3	Q4
1	Shopping	1	1
2	Using service e.g. bank, post office, hairdresser, travel agent	1	2
3	Using public amenity e.g. court, police station, library, hospital	1	3
4	Eating/drinking out	1	4
5	Other social/leisure	1	5
6	Buying petrol	1	6
7	Delivering goods	1	7
8	Window shopping	1	8
9	Personal business e.g. job interview, church	1	9
10	General recreation	1	10
11	Live here	1	11
12	Work here	1	12
13	Travelling through the area	1	13
14	Visiting friends and relatives	1	14
15	Dropping off/picking up friend or relative (incl. school)	1	15
16	Other **CODE AND WRITE IN**	1	16

Q4. **IF MORE THAN ONE MENTIONED IN Q3 ASK:** And what is your ONE main reason for visiting this area on this occasion today? **CODE ONE ACTIVITY IN COLUMN Q4 ABOVE**

Details of visiting area

Q5. **SHOW MAP** How often do you visit the area shown on this map?

1 5 or more days a week
2 3 or 4 days a week
3 2 days a week
4 Once a week
5 Once a fortnight
6 About once a month
7 Less than once a month
8 First time
9 Don't know

Q6. Do you live or work within ten minutes walk of this area?

1 Live within 10 minutes walk
2 Work within 10 minutes walk
3 Both
4 No, neither
5 Don't know

Mode of transport

Q7. How did you travel to this area today? **PROBE FOR MAIN METHOD. CODE ONE ONLY**

1	Drove a car / van / lorry	7	Train
2	Drove a motorbike / moped / scooter	8	Bicycle
3	Drove a delivery vehicle	9	Barclays Cycle Hire **(IF LOCATION = 12)**
4	Given a lift	10	Walked
5	Bus	11	Taxi / minicab
6	Tube / Underground	12	Other **WRITE IN** ……

Q8. How frequently do you use **[MODE OF TRANSPORT AT Q7]** to travel to this area?

1	5 or more days a week	6	About once a month
2	3 or 4 days a week	7	Less than once a month
3	2 days a week	8	First time
4	Once a week	9	Don't know
5	Once a fortnight		

Q9. What other modes do you use to travel to this area? **MULTICODE**

1	Car / van / lorry	6	Bicycle
2	Motorbike / moped / scooter	7	Barclays Cycle Hire **(IF LOCATION = 12)**
3	Bus	8	Walk all the way
4	Tube / Underground	9	Taxi / minicab
5	Train	10	Other **WRITE IN** ……

Q10. **IF BUS AT Q7 ASK:** How would you rate the following aspects of your journey by bus today? showcard 3. **TICK START AND ROTATE. READ OUT**

		extremely dissatisfied									extremely satisfied
1	Length of time waited for the bus	0	1	2	3	4	5	6	7	8	9	10
2	Comfort of journey	0	1	2	3	4	5	6	7	8	9	10
3	Value for money	0	1	2	3	4	5	6	7	8	9	10
4	Ease of getting on and off the bus	0	1	2	3	4	5	6	7	8	9	10
5	Level of crowding on the bus	0	1	2	3	4	5	6	7	8	9	10
6	Length of time the journey took	0	1	2	3	4	5	6	7	8	9	10
7	Convenience of the bus stops	0	1	2	3	4	5	6	7	8	9	10

Q11. **ASK ALL** Which of the reasons on this card describe why you decided to use …. **(MODE OF TRANSPORT USED AT Q7)** rather than any other method of transport? **SHOWCARD 4. CODE ALL MENTIONED UNDER Q11**

		Q11	Q12
1	Cheaper/less expensive	1	1
2	Quicker	1	2
3	More direct	1	3
4	Had heavy bags/shopping to carry	1	4
5	Travelling with children	1	5
6	More relaxing/comfortable	1	6
7	Easier/more convenient	1	7
8	Safer	1	8
9	Avoids parking difficulties	1	9
10	Going to more than one place	1	10
11	Only method possible	1	11
12	Live very close by	1	12
13	Need/enjoy exercise/healthy	1	13
14	No car/can't drive	1	14
15	Weather issues	1	15
16	Avoid the congestion charge	1	16
17	Don't know	1	17
18	Other (**PLEASE WRITE IN**)	1	18

……

Q12. **IF MORE THAN ONE ANSWER AT Q11 ASK** And which ONE reason best describes why you decided to use that method? **CIRCLE CODE IN COLUMN Q14 ABOVE FOR ONE REASON ONLY**

Q13. **ASK ALL** How frequently do you travel by bus in this area?

1	5 or more days a week	6	About once a month
2	3 or 4 days a week	7	Less than once a month
3	2 days a week	8	First time
4	Once a week	9	Never
5	Once a fortnight	10	Don't know

Q14. How frequently did you travel by bus in this area 12 months ago?

1	5 or more days a week	6	About once a month
2	3 or 4 days a week	7	Less than once a month
3	2 days a week	8	First time
4	Once a week	9	Not at all/never
5	Once a fortnight	10	Don't know

Q15. Which of the things shown on this card would encourage you to use buses more often in this area? **SHOWCARD 5. PROBE. CODE ALL MENTIONED UNDER Q15**

		Q15	Q16
1	Nothing **GO TO Q17**	1	
2	More regular / frequent buses	1	2
3	More reliable buses	1	3
4	Faster journey	1	4
5	Direct bus route	1	5
6	Greater priority given to buses	1	6
7	Reduce number of cars on the road / less congestion	1	7
8	Stricter enforcement of illegal parking in bus lanes	1	8
9	More seats on buses / less crowded buses	1	9
10	More comfortable journey	1	10
11	More shelters at bus stops	1	11
12	More seating at bus stops	1	12
13	Bus stop nearer home/destination	1	13
14	Improved ease of getting on and off buses	1	14
15	More information about buses	1	15
16	Safer buses	1	16
17	Make children behave/school buses	1	17
18	Cleaner buses	1	18
19	Greener buses	1	19
20	Lower fares	1	20
21	Other **(PLEASE WRITE IN)**	1	21

Q16. **IF MORE THAN ONE ANSWER AT Q15 ASK** And which ONE change would be most likely to encourage you to use buses more? **SHOWCARD 5 CIRCLE ONE CODE IN COLUMN Q18 ABOVE FOR ONE REASON ONLY**

Q17. How strongly do you agree or disagree with each of the following statements about this area? **SHOWCARD 6. TICK START AND ROTATE. READ OUT**

		strongly disagree									strongly agree
1	There should be more bus lanes	0	1	2	3	4	5	6	7	8	9	10
2	There should be stricter enforcement of illegal parking in bus lanes	0	1	2	3	4	5	6	7	8	9	10
3	Goods vehicles should not be allowed in bus lanes	0	1	2	3	4	5	6	7	8	9	10
4	Buses should be given priority at traffic lights	0	1	2	3	4	5	6	7	8	9	10
5	Bus stops are conveniently located	0	1	2	3	4	5	6	7	8	9	10
6	Bus lanes are of benefit to cyclists	0	1	2	3	4	5	6	7	8	9	10

Q18B How safe do you feel in this neighbourhood during the day?

1	Very safe	4	Very unsafe
2	Fairly safe	5	Never go out in the day
3	A bit unsafe		

Q18C How safe do you feel in this neighbourhood during the evening/after dark?

1 Very safe
2 Fairly safe
3 A bit unsafe
4 Very unsafe
5 Never go out in the evening

Q18E In the past year, would you say you have seen more, less or about the same amount of uniformed police officers (that is, police men and women and Police Community Support Officers) in this local neighbourhood?

1 More
2 About the same
3 Less
4 Don't know

Q18F **IF CYCLIST (Q7 = 8 OR 9 OR Q9 = 6 OR 7) ASK:** How safe do you feel when cycling in this neighbourhood?

1 Very safe
2 Fairly safe
3 A bit unsafe
4 Very unsafe

Q19. Which of the things shown on this card would encourage you to cycle more often in this area? **SHOWCARD 7. CODE ALL MENTIONED**

1 (More) cycle lanes on the roads 1
2 (More) dedicated cycle paths 1
3 Less road traffic 1
4 Free on-road cycle training 1
5 Bicycle hire scheme 1
6 (Better) bicycle parking facilities in this area 1
7 (Better) bicycle parking facilities at / near your home 1
8 None of these / nothing 1
9 Don't know 1

Q21. **ASK IF DROVE OR WAS GIVEN LIFT (Q7 CODES 1-4), OTHERWISE GO TO Q23** Where did you park your vehicle? Was it… **READ OUT**

1 Off street residential parking
2 Off street private parking (eg driveway)
3 Off street municipal/NCP car park
4 In store/pub/take-away car park
5 On main road
6 On side road
7 In filling station forecourt
8 Other place
9 Don't know

Q22. How satisfied are you with each of the following: **SHOWCARD 8. READ OUT**

		extremely dissatisfied										extremely satisfied
1	The number of parking spaces provided in this area?	0	1	2	3	4	5	6	7	8	9	10
2	The ease of access to this area by car?	0	1	2	3	4	5	6	7	8	9	10

Shopping and expenditure in the area

Q23. Could you look at this card and tell me the range of things you are shopping for or services you are using in this area today? **SHOWCARD 9. CODE ALL MENTIONED**

1 Food/groceries 1
2 Take-away food 1
3 Wine, beer, spirits 1
4 Clothing or footwear 1
5 Confectionery, tobacco, newspapers 1
6 Stationery/books/CDs/DVDs/leisure goods 1
7 Pharmaceuticals/toiletries 1
8 Luxury goods 1
9 Major household goods 1
10 Other household goods (eg electrical goods) 1
11 Travel Pass/mobile top up/phonecard 1
12 Services (e.g. hairdresser, dry cleaners, Post Office, travel agent) 1
13 Eating in a café or restaurant 1
14 Having a drink in a pub or wine bar 1
15 Going to cinema, theatre, concert, leisure facility etc 1
16 Other **(PLEASE WRITE IN)** 1

Q24. How much will you have spent in this area today? **SHOWCARD 10**

1	Nothing	6	£15-£19.99	11	£100-£149.99
2	Under £1	7	£20-£29.99	12	£150-£199.99
3	£1-£4.99	8	£30-£49.99	13	£200+
4	£5-£9.99	9	£50-£74.99	14	Don't know
5	£10-£14.99	10	£75-£99.99	15	Refused

Q25. How much do you typically spend on average per visit to this area? **SHOWCARD 10**

1	Nothing	6	£15-£19.99	11	£100-£149.99
2	Under £1	7	£20-£29.99	12	£150-£199.99
3	£1-£4.99	8	£30-£49.99	13	£200+
4	£5-£9.99	9	£50-£74.99	14	Don't know
5	£10-£14.99	10	£75-£99.99	15	Refused

Q26. How long will you spend in this area today altogether?

1	Under 5 minutes	4	30-59 minutes	7	Don't know
2	5-14 minutes	5	1-3 hours		
3	15-29 minutes	6	More than 3 hours		

Q27. In what ways do you think this area could be improved? **SHOW MAP. CODE ALL MENTIONED IN COLUMN A BELOW. SHOWCARD 11**

Q28. Which of these would be the most important reason? **PROBE FOR MOST IMPORTANT AND CODE IN 1ST COLUMN**

		A	1ST
1	More shops	1	1
2	Better range of shops	2	2
3	Improve shops / better quality shops	3	3
4	Longer shop opening hours	4	4
5	More leisure facilities e.g. restaurants, bars, cinemas etc	5	5
6	More pleasant/greener environment	6	6
7	Cleaner streets	7	7
8	Reduce pollution	8	8
9	More public spaces	9	9
10	Remove undesirable element/more policing	10	10
11	Less traffic	11	11
12	High street should be pedestrianised	12	12
13	Improve pedestrian environment	13	13
14	More/easier parking	14	14
15	Better bus service	15	15
16	Improve access to bus stop locations	16	16
17	Improved cycle facilities	17	17
18	Other	18	18
19	Nothing	19	
20	Don't know	20	20

Oxford Street/Regent Street only – others go to Q29A

QX1 Why are you visiting this area – the Oxford Street area – today, rather than going somewhere else?

DO NOT PROMPT. CODE ALL MENTIONED

1	Oxford Street is best shopping area	1
2	Visiting a particular shop	1
3	More / better / bigger range of shops	1
4	Longer shop opening hours	1
5	Visiting a particular leisure facility	1
6	More leisure facilities, e.g. restaurants, bars, cinemas etc	1
7	Visiting other places in London as well	1
8	As a 'day out' / 'trip into town'	1
9	To do something different / special	1
10	Had to be in Central London for other reason	1
11	Meeting people here	1
12	Good public transport	1
13	Easy for me to travel to and from	1
14	Easy for other people to travel to and from	1
15	Live near here	1
16	Work near here	1
17	Other **WRITE IN** ……	1
18	No particular reason	1

QX2 Were you aware that there are a number of changes to travel around Tottenham Court Road, with diversions to some bus services and changes to walking and cycling routes?

1 Yes 2 No **GO TO QX6** 3 Don't know **GO TO QX6**

QX3 Do you know the reason for these diversions and travel changes around Tottenham Court Road? **DO NOT PROMPT. CODE ALL MENTIONED**

1	Building works (unspecified)	1
2	Utility works (e.g. electricity, gas, water)	1
3	Transport works (unspecified)	1
4	Improving Underground station	1
5	Building rail / Crossrail station	1
6	Improving bus facilities / bus routes	1
7	Improving road layout / better roads	1
8	Improving cycle facilities	1
9	Improving pavements / pedestrian facilities	1
10	New shops / shopping centre development	1
11	Other answer(s)	1
12	No / Don't know	1

QX4 Was your journey to the Oxford Street area affected by these diversions and travel changes?

1 Yes 2 No **GO TO QX6** 3 Don't know **GO TO QX6**

QX5 How was your journey affected? **PROMPT. CODE ALL MENTIONED**

1	Changed usual bus journey	1
2	Changed usual tube journey	1
3	Changed walking route / walked a different way	1
4	Changed cycling route / cycled a different way	1
5	Changed driving route / drove a different way	1
6	Avoided getting a bus / didn't use bus	1
7	Avoided getting the tube / didn't use tube	1
8	Avoided walking / didn't walk	1
9	Avoided cycling / didn't cycle	1
10	Avoided driving / didn't drive	1
11	Don't know	1

QX6 Have you used the diagonal crossing at Oxford Circus?

1 Yes 2 No **GO TO Q29A** 3 Don't know **GO TO Q29A**

QX7 How satisfied are you with each of the following aspects of the diagonal crossing at Oxford Circus: **SHOWCARD 12. READ OUT**

	extremely dissatisfied										extremely satisfied
The ease of crossing the road?	0	1	2	3	4	5	6	7	8	9	10
The safety of crossing the road?	0	1	2	3	4	5	6	7	8	9	10

All

Q29A Do you go to any of these shopping centres in and around London? **SHOWCARD 13. CODE ALL MENTIONED**

1	No	1
2	Aylesham Shopping Centre	1
3	Bluewater	1
4	Brent Cross	1
5	Canary Wharf	1
6	Croydon	1
7	Elephant & Castle	1
8	Lakeside	1
9	Victoria Place	1
10	Westfield	1
11	Whiteleys	1

Q29B If you live in a London borough, which one do you live in?

1	Barking & Dagenham	13	Hammersmith & Fulham	25	Newham
2	Barnet	14	Haringey	26	Redbridge
3	Bexley	15	Harrow	27	Richmond-upon-Thames
4	Brent	16	Havering	28	Southwark
5	Bromley	17	Hillingdon	29	Sutton
6	Camden	18	Hounslow	30	Tower Hamlets
7	City of Westminster	19	Islington	31	Waltham Forest
8	Croydon	20	Kensington & Chelsea	32	Wandsworth
9	Ealing	21	Kingston-upon-Thames	33	Do not live in London **GO TO Q29C**
10	Enfield	22	Lambeth	34	Don't know
11	Greenwich	23	Lewisham	35	Refused
12	Hackney	24	Merton		

Q29C **ASK IF DOES NOT LIVE IN LONDON BOROUGH:** Do you live in … **READ OUT**

1	The South East of England	4	Outside of the UK
2	Elsewhere in England	5	Don't know
3	Scotland, Wales or Northern Ireland	6	Refused

Q29D Do you do internet shopping?

1	Yes	2	No **GO TO Q30**

Q29E What kind of goods do you shop for online? **SHOWCARD 14, CODE ALL MENTIONED**

1	Food/groceries	1
2	Wine, beer, spirits	1
3	Clothing or footwear	1
4	Books/CDs/DVDs/leisure goods	1
5	Luxury goods	1
6	Major household goods	1
7	Other household goods (eg electrical goods)	1
8	Take-way food	1
9	Tickets (air, rail, concerts)	1

Classification

Q30. Do you have any long term physical or other impairment which limits your daily activities or the work you can do, including problems due to age? **SHOWCARD 15, CODE ALL MENTIONED**

1	No, none	1
2	Mobility impairment	1
3	Visual impairment	1
4	Hearing impairment	1
5	Learning disability	1
6	Mental health condition	1
7	Serious long term illness	1
8	Other **WRITE IN**	1
9	Refused	1

Q31. Do you use a wheelchair for travelling?

1	Yes	3	Refused
2	No		

Q32. Is the respondent carrying any of the following…? code by observation

1	Shopping bag(s) / shopping trolley	4	Suitcase / rucksack
2	Buggy / pram	5	Other large / awkward object
3	Carrying a child / baby	6	Nothing

Q33. Finally, I would like to ask you some questions about yourself. This is for classification purposes only. The personal information you provide during this survey will be kept confidential by Accent and will not be disclosed to third parties. It will be used by Accent only for this study, which is being undertaken for Transport for London. Which of the following age groups do you fall into?
SHOWCARD 16

1	16-24	4	45-54	7	65-74
2	25-34	5	55-59	8	75 or over
3	35-44	6	60-64	9	refused

Q34. **RECORD GENDER**

1 Male
2 Female

Q35. Which of the following best describes your working status? **SHOWCARD 17**

1 Working full time (30+ hours a week)
2 Working part time (less than 30 hours a week)
3 A full time student
4 A part time student
5 Not working, but looking for work
6 Not working and not looking for work
7 Retired
8 Looking after family and home
9 Other
10 Refused

Q36. To which of these ethnic groups do you consider you belong? **SHOWCARD 18**

1 White
2 Asian or Asian British
3 Black or Black British
4. Mixed
5. Chinese or Other Ethnic Group
6. Don't know
7. Refused

Q37. How many people are there in your household, including yourself?

1 One
2 Two
3 Three
4 Four
5 Five
6 Six or more
7 Refused

Q38. Do you have access to a car or van that you could have used for your journey to this area today?

1 Yes, drove today
2 Yes, but used another mode
3 No – no access to a car or van
4 Refused

Q39. Are you the chief income earner your household? That is the person with the largest income whether from employment pensions, state benefits, investments or any other sources (if equal income is claimed for 2 or more people, refer to the eldest)

1 Yes, respondent is Chief Income Earner
2 No, someone else
3 Refused

Q40. What is your total gross annual household income? This is income from work and any other sources such as benefits and pensions, before deductions e.g. income tax, National Insurance. **SHOWCARD 19**

1 Under £5,000
2 £5,000 to £9,999
3 £10,000 to £14,999
4 £15,000 to £19,999
5 £20,000 to £24,999
6 £25,000 to £34,999
7 £35,000 to £49,999
8 £50,000 to £74,999
9 £75,000 to £99,999
10 £100,000 or over
11 Don't know
12 Refused

Q41. Thank you very much for taking part in this survey. If necessary may we recontact you about this study?

1 Yes
2 No

Q42. Transport for London may be carrying out further research about transport in London. Would it be OK for a research company working on their behalf to contact you again in the future for research purposes?

1 Yes
2 No

This research was conducted under the terms of the MRS code of conduct and is completely confidential. If you would like to confirm my credentials or those of Accent Marketing & Research please call the MRS free on 0500 396999. **HAND OVER THE THANK YOU SLIP.**

Please can I take a note of your name and where we can contact you for quality control purposes?

Respondent name: .....

Telephone: home:.....work:.....

Thank you

I confirm that this interview was conducted under the terms of the MRS code of conduct and is completely confidential

Interviewer's signature:.....

APPENDIX B

Key Results by Town Centre

Demographic profile

Table 57: Gender by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
Male	34	38	48	37	38	45	38	44	49	44	33	40	34	45	30
Female	66	62	52	63	62	55	62	56	51	56	67	60	66	55	70
Weighted base	**313**	**364**	**316**	**330**	**297**	**298**	**324**	**318**	**302**	**295**	**319**	**321**	**313**	**331**	**301**

Table 58: Age by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
16-24	19	16	16	13	18	18	23	12	15	12	23	26	17	13	18
25-34	12	15	32	25	21	21	22	25	21	20	20	25	24	29	19
35-44	15	16	20	22	11	21	13	24	19	18	20	18	20	19	21
45-54	19	19	16	14	19	15	14	18	22	16	17	16	16	16	23
55-59	6	6	7	5	7	9	8	8	9	8	6	6	5	6	9
60-64	8	7	5	6	6	6	6	3	6	10	4	6	7	5	3
65-74	13	14	3	12	12	7	9	5	6	11	8	3	8	8	5
75 or over	8	8	*	4	5	2	5	4	1	5	2	1	3	3	1
Refused	0	0	0	0	*	1	1	1	1	*	0	1	*	1	0
Weighted base	**313**	**364**	**316**	**330**	**297**	**299**	**325**	**318**	**303**	**295**	**319**	**321**	**313**	**331**	**301**

* = less than 0.5%

Table 59: Ethnicity by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
White	94	88	57	82	80	68	79	60	44	66	83	69	61	57	69
Mixed Background	1	2	4	1	5	12	5	4	11	19	5	6	9	7	4
Asian or Asian British	3	7	30	11	11	11	9	25	39	11	8	15	19	23	22
Black or Black British	2	1	5	4	2	6	3	9	5	2	3	4	8	11	4
Chinese or Any Other		1	2	2	1	1	3	1	*	2	1	2	2	1	*
Refused		*	1	0	1	1	1	1	*	*	0	3	1	1	0
Weighted base	**313**	**364**	**316**	**330**	**297**	**299**	**325**	**318**	**303**	**295**	**319**	**321**	**313**	**331**	**301**

* = less than 0.5%

Table 60: Employment Status by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
Working full time (30+ hours a week)	28	42	46	50	43	48	39	46	46	43	43	55	36	46	42
Working part time (less than 30 hours a week)	17	14	18	15	14	18	13	17	21	16	19	15	19	14	16
A full time student	4	4	8	6	5	10	19	8	9	7	16	15	10	5	6
A part time student	1	1	1	1	1	1	2	*	1	0	0	1	*	2	2
Not working, but looking for work	9	8	7	4	5	4	2	7	8	7	3	2	5	9	11
Not working and not looking for work	5	1	8	2	4	2	3	4	3	2	2	2	7	6	5
Retired	27	26	8	18	21	12	17	11	10	22	12	6	15	13	7
Looking after family and home	8	4	4	5	4	3	4	4	1	4	5	1	6	4	9
Other	1	1	0	*	1	1	*	2	*	0	0	0	1	1	*
Refused	0	*	0	0	*	*	*	*	1	0	*	3	*	*	0
Weighted base	**313**	**364**	**316**	**330**	**297**	**299**	**325**	**318**	**303**	**295**	**318**	**321**	**313**	**330**	**301**

* = less than 0.5%

Table 61: Income by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
Under £5,000	6	3	5	1	2	3	4	5	3	4	2	1	6	2	3
£5,000-£9,999	7	7	6	4	5	3	5	7	3	4	2	3	6	7	8
£10,000-£14,999	8	5	6	4	6	5	7	5	3	5	5	3	7	4	7
£15,000-£19,999	5	3	5	4	5	6	4	4	6	4	5	2	7	6	7
£20,000-£24,999	7	7	9	3	6	7	3	6	8	4	6	4	8	6	8
£25,000-£34,999	7	8	11	6	6	10	8	13	10	10	8	7	8	8	10
£35,000-£49,999	8	10	10	9	13	12	10	10	6	13	11	11	6	12	11
£50,000-£74,999	6	7	5	8	8	10	9	6	6	10	10	12	7	5	6
£75,000-£99,999	2	7	1	4	2	3	3	1	*	2	8	6	2	2	1
£100,000 or over	1	4	1	7	1	4	3	2	1	2	4	7	2	*	1
Don't know	26	19	18	22	28	17	24	16	21	19	24	27	22	18	20
Refused	16	21	22	28	17	19	19	26	33	24	15	15	19	28	17
Weighted base	**313**	**363**	**316**	**330**	**296**	**290**	**324**	**318**	**303**	**294**	**315**	**313**	**313**	**327**	**301**

* = less than 0.5%

Table 62: Number of people in household by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
One	23	19	24	24	23	20	22	25	15	18	13	15	21	20	17
Two	34	35	21	35	30	29	33	22	20	27	28	24	27	28	23
Three	20	19	20	20	19	21	20	27	27	19	22	28	18	20	26
Four	15	16	24	13	19	17	11	15	21	20	22	21	20	18	19
Five	5	8	8	5	4	7	10	6	7	9	9	7	7	9	10
Six or more	3	2	3	3	5	4	4	3	7	6	7	3	5	4	4
Refused	*	1	1	*	*	1	0	1	3	2	0	3	1	1	1
Weighted base	**313**	**364**	**316**	**330**	**297**	**299**	**324**	**318**	**303**	**295**	**319**	**321**	**313**	**331**	**301**

* = less than 0.5%

Table 63: Access to a car by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
Yes, drove today	25	32	6	5	12	12	13	7	16	29	28	4	8	8	13
Yes, but used another mode	26	26	25	34	32	33	32	26	28	31	32	42	22	32	22
No - no access to a car or van	49	42	68	60	56	54	54	65	54	40	39	53	69	59	64
Refused	0	1	1	1	0	1	1	2	2	*	0	2	1	1	*
Weighted base	**313**	**364**	**316**	**330**	**298**	**299**	**325**	**318**	**303**	**295**	**319**	**321**	**313**	**331**	**301**

* = less than 0.5%

Table 64: Mobility by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
No, none	83	87	91	89	90	94	91	91	90	87	93	97	83	87	87
Mobility impairment	10	7	4	6	7	3	4	5	4	4	4	2	9	7	6
Visual impairment	0	1	*	1	1	*	0	*	1	2	*	0	*	1	1
Hearing impairment	2	2	0	1	1	*	2	1	*	2	1	1	1	1	2
Learning disability	1	1	1	0	*	0	0	1	1	*	0	*	1	1	1
Mental health condition	2	*	2	1	*	2	1	1	2	2	2	1	2	2	1
Serious long term illness	3	2	4	3	1	0	2	2	4	3	1	0	5	3	1
Other	1	0	*	*	1	1	1	*	*	1	*	*	1	*	1
Refused	0	1	0	0	1	0	0	0	*	0	0	0	0	0	1
Weighted base	**313**	**363**	**316**	**330**	**297**	**299**	**325**	**318**	**303**	**295**	**319**	**321**	**313**	**331**	**301**

* = less than 0.5%

Table 65: Whether use wheelchair for travelling by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
Yes	1	1	*	1	*	*	1	1	*	*	*	*	1	1	1
No	99	99	100	99	99	100	99	99	99	100	100	99	99	98	99
Refused	*	0	0	0	1	0	0	*	1	0	0	1	0	*	*
Weighted base	**312**	**364**	**316**	**330**	**297**	**299**	**325**	**317**	**303**	**295**	**319**	**321**	**313**	**330**	**301**

* = less than 0.5%

Table 66: Whether carrying anything by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
Shopping bag(s)/shopping trolley	50	50	49	47	45	44	32	43	67	39	46	52	56	56	51
Buggy/pram	6	4	2	4	4	2	7	3	1	1	5	1	3	2	4
Carrying a child/baby	*	0	2	0	*	1	0	1	1	*	1	1	*	0	1
Suitcase/rucksack	4	10	16	11	5	13	5	7	6	12	11	14	8	14	7
Other large/awkward object	0	1	1	1	1	1	1	1	1	*	1	1	1	2	1
Nothing	43	37	32	40	46	43	58	46	27	48	41	35	35	33	39
Weighted base	**312**	**361**	**316**	**330**	**297**	**297**	**325**	**318**	**303**	**291**	**319**	**321**	**313**	**331**	**301**

* = less than 0.5%

Table 67: Where live

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
Inner London[23]	3	15	91	88	15	8	26	87	12	2	7	40	75	79	7
Outer London[24]	87	77	8	8	73	87	64	10	86	93	73	29	20	18	89
The South East of England	10	6	1	2	10	3	6	2	*	3	15	10	2	2	3
Elsewhere in England	1	*	*	*	1	*	1	1	1	1	4	9	2	*	*
Scotland, Wales or Northern Ireland	*	1	*	*	*	*	2	*	*	*	*	1	*	*	1
Outside of the UK	*	1	*	1	1	1	2	*	1	1	*	11	*	1	*
Weighted base	**313**	**364**	**316**	**330**	**298**	**299**	**325**	**318**	**303**	**295**	**319**	**321**	**313**	**331**	**301**

* = less than 0.5%

[23] Inner London = Camberwell, Clapham Junction, Greenwich, Hackney, Enfield, Stratford

[24] Outer London = Bromley, Bexleyheath, Croydon, Ealing, Harlesden, Harrow, Kingston, Wood Green

Purpose of visit

Table 68: Main purpose mentioned for visiting the town centre by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
Shopping	58	60	40	52	61	52	26	46	61	49	58	57	55	59	65
Using service	11	8	10	6	6	11	9	12	7	11	6	3	10	5	4
Using public amenity	2	3	6	2	1	2	3	3	1	3	1	2	3	2	1
Eating/drinking out	4	6	8	5	3	7	11	6	3	6	4	4	4	5	2
Other social/leisure	2	1	5	1	1	2	10	2	1	4	2	1	1	2	2
Buying petrol	0	0	0	0	0	0	0	0	*	0	0	*	0	*	0
Delivering goods	0	0	0	0	0	0	0	1	1	0	*	0	*	0	*
Window shopping	2	1	1	1	1	2	1	3	0	2	1	4	2	1	2
Personal business	6	3	9	4	5	3	2	2	3	5	2	5	4	3	6
General recreation	1	1	2	1	1	1	3	1	1	3	2	1	1	1	1
Live here	2	3	5	11	5	5	13	8	13	4	3	*	8	9	3
Work here	8	8	8	12	8	9	12	12	7	10	12	15	8	7	9
Travelling through the area	0	2	2	3	1	1	1	1	0	*	1	2	1	2	1
Visiting friends and relatives	2	3	2	1	4	3	4	2	4	2	3	2	3	3	2
Dropping off/picking up friend or relative	1	1	1	1	1	*	0	1	0	0	1	1	*	1	1
Other	0	*	*	*	2	1	7	1	0	1	3	2	1	*	1
Weighted base	**313**	**364**	**316**	**330**	**298**	**299**	**325**	**318**	**303**	**295**	**319**	**321**	**313**	**331**	**301**

* = less than 0.5%

Mode of Access to area today

Table 69: Modes used to access each area by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
Drove a car/van/lorry	23	29	5	4	12	11	12	7	14	27	27	2	7	9	13
Drove a motorbike/ moped/scooter	*	1	*	0	0	1	*	1	0	*	*	0	0	*	0
Drove a delivery vehicle	0	0	0	0	0	0	0	0	1	0	0	0	0	0	*
Given a lift	5	6	1	0	3	2	1	1	1	1	3	1	2	*	2
Bus	52	39	44	35	39	33	26	38	27	33	37	24	39	37	44
Tube	0	0	1	1	*	14	9	1	5	9	1	52	8	12	2
Train	0	10	3	15	19	7	14	10	4	4	9	11	13	3	7
Bicycle	1	*	3	7	3	3	1	5	1	2	2	1	1	2	*
Walked	17	15	42	37	16	29	34	37	45	23	20	8	28	35	31
Taxi/minicab	0	0	0	0	1	0	*	*	1	0	0	1	2	1	1
Other	1	1	1	*	7[1]	0	2	*	*	0	1	*	1	*	*
Weighted base	**313**	**364**	**316**	**330**	**298**	**299**	**325**	**318**	**303**	**295**	**319**	**321**	**313**	**331**	**301**

* = less than 0.5%

1. 6% = tram

Frequency of visiting centre

Table 70: Frequency of visiting town centre by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
5 or more days a week	25	19	44	46	26	35	36	39	44	23	25	20	28	29	31
3 or 4 days a week	17	15	14	14	12	19	17	17	23	17	14	7	21	15	14
2 days a week	16	11	15	10	13	13	10	13	16	15	10	7	14	15	16
Once a week	20	20	14	12	16	15	10	15	9	20	17	11	16	15	20
Once a fortnight	9	12	3	7	9	5	7	5	4	10	10	9	6	7	6
About once a month	9	13	4	5	10	4	7	4	1	6	12	15	7	9	5
Less than once a month	4	9	3	5	10	5	11	4	2	7	10	22	6	5	6
First time	*	1	2	1	2	3	2	2	1	1	3	8	1	3	2
Don't know	0	0	*	0	0	*	0	0	0	*	0	1	*	1	0
Weekly mean	**2.6**	**2.1**	**3.4**	**3.4**	**2.4**	**3.0**	**3.0**	**3.2**	**3.7**	**2.4**	**2.3**	**1.7**	**2.8**	**2.6**	**2.8**
Weighted base	**313**	**364**	**316**	**330**	**298**	**299**	**325**	**318**	**303**	**295**	**319**	**321**	**313**	**331**	**301**

* = less than 0.5%

Average Spend

Table 71: Average spend today by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
Nothing	6	7	5	4	3	5	8	6	5	8	2	3	5	6	4
Under £5	10	10	9	12	11	8	22	14	13	12	11	8	11	8	10
£5-£19.99	32	23	48	34	20	39	40	47	44	33	27	17	33	30	28
£20-£49.99	30	28	27	33	33	29	23	25	26	27	27	22	37	31	35
£50-£99.99	17	21	8	9	20	15	5	7	9	14	20	23	10	18	16
£100+	6	10	3	8	13	3	2	1	3	5	13	27	4	8	6
Mean (£)	**34**	**44**	**24**	**32**	**50**	**29**	**19**	**21**	**25**	**31**	**48**	**74**	**29**	**38**	**36**
Weighted base[1]	**298**	**349**	**308**	**315**	**276**	**295**	**315**	**303**	**292**	**287**	**308**	**286**	**305**	**318**	**281**

* = less than 0.5%

1. except refused and don't know

Table 72: Average spend per visit by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
Nothing	1	1	3	3	1	3	4	3	3	4	1	3	2	2	2
Under £5	5	9	7	9	10	9	22	13	9	10	10	7	9	5	5
£5-£19.99	37	30	49	35	20	46	45	52	50	38	32	21	42	36	32
£20-£49.99	36	33	31	33	34	30	21	23	27	33	33	24	32	34	44
£50-£99.99	17	20	9	15	20	11	6	8	8	10	20	25	11	20	14
£100+	4	7	1	4	14	1	2	1	3	4	5	21	5	3	2
Mean (£)	**33**	**39**	**23**	**31**	**48**	**24**	**20**	**21**	**25**	**29**	**36**	**63**	**30**	**34**	**31**
Weighted base[1]	**275**	**332**	**300**	**291**	**264**	**281**	**283**	**277**	**288**	**269**	**291**	**251**	**288**	**309**	**257**

* = less than 0.5%

1. except refused and don't know

Table 73: Average total spend per week by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
Nothing	1	1	3	3	1	3	4	3	3	4	1	3	2	2	2
Under £5	8	9	7	4	5	7	19	7	3	10	11	14	11	5	7
£5-£19.99	20	27	15	19	26	19	27	27	20	26	28	23	22	18	17
£20-£49.99	25	29	30	24	22	29	25	26	21	28	26	27	22	29	29
£50-£99.99	25	20	25	21	20	26	12	23	33	22	16	16	21	24	26
£100+	20	14	20	28	26	16	14	15	20	10	19	18	22	22	20
Mean (£)	**70**	**59**	**79**	**95**	**86**	**65**	**57**	**65**	**87**	**55**	**65**	**78**	**78**	**74**	**71**
Weighted base[1]	**275**	**331**	**299**	**293**	**265**	**280**	**283**	**276**	**287**	**268**	**291**	**250**	**287**	**309**	**258**

* = less than 0.5%

1. except refused and don't know

Table 74: Average total spend per month by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Oxford Street/ Regent Street %	Stratford %	Wood Green %	Woolwich %
Nothing	1	1	3	3	1	3	4	3	3	4	1	3	2	2	2
Under £5	1	2	1	1	1	2	5	2	1	1	2	5	1	1	1
£5-£19.99	7	5	6	3	4	5	13	5	2	7	7	6	10	4	4
£20-£49.99	10	15	5	5	13	6	12	9	7	10	16	14	11	7	8
£50-£99.99	13	19	11	16	17	13	17	18	13	19	18	17	13	14	13
£100+	68	58	75	71	65	71	49	63	74	59	57	55	63	72	73
Mean (£)	**282**	**238**	**316**	**380**	**346**	**263**	**229**	**260**	**348**	**221**	**260**	**315**	**311**	**297**	**284**
Weighted base[1]	**275**	**331**	**299**	**293**	**265**	**280**	**283**	**276**	**287**	**268**	**291**	**250**	**287**	**309**	**258**

* = less than 0.5%

1. except refused and don't know

Improvements to town centres

Table 75: Main priority for improvements in each area by town centre

	Bexleyheath %	Bromley %	Camberwell %	Clapham Junction %	Croydon %	Ealing %	Greenwich %	Hackney %	Harlesden %	Harrow %	Kingston %	Street/ Regent %	Stratford %	Wood Green %	Woolwich %
More shops	6	3	1	4	2	3	6	7	4	3	4	2	4	3	8
Better range of shops	20	22	15	13	11	21	14	18	15	19	10	2	17	9	22
Improve shops / better quality shops	4	10	9	5	4	10	6	7	10	8	3	2	6	5	10
Longer shop opening hours	6	12	2	2	8	8	5	3	2	7	13	8	7	7	6
More leisure facilities	6	6	8	4	9	9	3	7	6	7	7	7	7	3	4
More pleasant/greener environment	5	6	5	10	10	7	4	5	5	8	8	9	11	6	2
Cleaner streets	11	5	8	9	12	8	11	4	11	11	12	6	16	17	14
Reduce pollution	1	2	4	5	2	3	2	5	1	1	3	8	2	4	1
More public spaces	1	2	2	4	3	4	2	3	3	3	4	6	4	3	3
Remove undesirable element/more policing	13	9	12	4	13	5	6	5	9	12	8	2	9	12	13
Less traffic	5	2	13	12	5	6	15	15	12	*	7	19	5	12	3
High street should be pedestrianised	*	2	1	7	*	2	6	2	2	1	2	7	1	2	1
Improve pedestrian environment	2	*	2	2	1	2	4	3	1	1	1	6	1	4	1
More/easier parking	3	4	5	4	5	5	3	2	8	9	8	2	2	4	4
Better bus service	3	4	7	2	3	2	2	4	4	2	3	1	3	1	5
Improve access to bus stop locations	*	*	1	*	1	*	*	*	2	2	1	1	1	1	*
Improve cycle facilities	1	2	2	6	1	2	2	2	1	1	2	3	1	1	*
Other	6	8	3	3	5	3	6	4	4	3	2	5	2	1	2
Don't know	5	1	1	5	3	1	3	4	*	*	4	6	2	2	*
Weighted base	**262**	**285**	**306**	**276**	**244**	**263**	**288**	**296**	**282**	**243**	**248**	**254**	**285**	**281**	**284**

* = less than 0.5%

Shaded boxes indicate top mentions in each town centre

APPENDIX C

Response and Weighting Factors

Response and Weighting Factors

Response

The total number of interviews was 4,746 (an average of 316 in each area).

Weighting factors

In order to reflect the distribution of the results by day as achieved in earlier phases of the Town Centres research the data were weighted so that 70% of the results were from weekdays, 20% from Saturdays and 10% from Sundays. The unweighted bases were 69% weekday, 24% Saturday, 7% Sunday.

Values used for calculating average spend:

- Nothing = 0
- Under £1 = 0.5
- £1-£4.99 = 3
- £5-£9.99 = 7.5
- £10-£14.99 = 12.5
- £15-£19.99 = 17.5
- £20-£29.99 = 25
- £30-£49.99 = 40
- £50-£74.99 = 62.5
- £75-£99.99 = 87.5
- £100-£149.99 = 125
- £150-£199.99 = 175
- £200+ = 225

The average number of days visiting the town centre per month was calculated using the following:

- 5 or more days = 22
- 3-4 days = 14
- 2 days = 8
- once a week= 4
- once a fortnight = 2
- once a month = 1
- less than once a month = 0.4
- first time = 0.2

Appendix D

Cycle Booster Key Results

Demographics

Table 76: Gender by town centre

	Total %	Location						
		Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
Male	70	81	73	86	43	70	62	75
Female	30	19	27	14	57	30	38	25
Base	**362**	**48**	**48**	**51**	**49**	**63**	**50**	**53**

Table 77: Age by town centre

	Total %	Location						
		Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
16-24	25	29	40	31	8	21	30	17
25-34	23	33	19	10	29	24	10	36
35-44	19	21	19	18	20	21	14	21
45-54	17	15	8	18	31	14	18	13
55-59	6	0	8	6	6	5	10	8
60-64	3	0	2	4	6	3	4	4
65-74	4	2	2	12	0	6	4	2
75 or over	3	0	2	2	0	6	8	0
Refused	*	0	0	0	0	0	2	0
Base	**362**	**48**	**48**	**51**	**49**	**63**	**50**	**53**

Table 78: Ethnicity by town centre

	Total %	Location						
		Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
White	80	65	79	90	88	68	90	83
Asian or Asian British	7	19	2	6	2	16	2	2
Black or Black British	9	13	17	4	4	11	6	6
Mixed	3	2	2	0	4	5	2	8
Chinese or other ethnic background	1	2	0	0	2	0	0	2
Base	**362**	**48**	**48**	**51**	**49**	**63**	**50**	**53**

Table 79: Employment Status by town centre

	Total %	Location						
		Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
Working full time (30+ hours a week)	47	56	27	29	51	46	46	72
Working part time (less than 30 hours a week)	19	15	33	20	24	17	14	13
A full time student	11	8	13	18	10	6	14	11
A part time student	2	6	4	0	2	0	0	0
Not working, but looking for work	7	8	8	10	6	11	2	2
Not working and not looking for work	2	4	4	4	0	0	2	0
Retired	9	2	6	16	2	14	18	2
Looking after family and home	2	0	2	2	4	2	4	0
Other	1	0	0	2	0	2	0	0
Refused	1	0	2	0	0	2	0	0
Base	**362**	**48**	**48**	**51**	**49**	**63**	**50**	**53**

Table 80: Income by town centre

		Location						
	Total %	Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
Under £5,000	4	6	4	2	2	5	6	4
£5,000-£9,999	4	4	4	6	4	3	2	2
£10,000-£14,999	6	4	8	14	2	6	6	0
£15,000-£19,999	4	4	6	6	2	5	4	0
£20,000-£24,999	4	6	0	8	2	3	4	4
£25,000-£34,999	11	21	10	4	16	8	16	6
£35,000-£49,999	12	10	13	8	27	10	16	6
£50,000-£74,999	10	6	4	10	16	8	14	11
£75,000-£99,999	3	0	0	2	6	3	0	11
£100,000 or over	4	2	2	4	0	2	6	9
Don't know	17	15	25	20	4	21	16	21
Refused	21	21	23	18	18	27	10	26
Base	**362**	**48**	**48**	**51**	**49**	**63**	**50**	**53**

Table 81: Number of people in household by town centre

		Location						
	Total %	Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
One	19	21	10	14	12	25	24	23
Two	25	21	17	31	29	24	26	25
Three	20	25	31	18	35	8	4	23
Four	21	21	25	22	18	22	24	13
Five	11	8	8	14	6	10	20	11
Six or more	3	4	6	0	0	10	0	2
Refused	2	0	2	2	0	2	2	4
Base	**362**	**48**	**48**	**51**	**49**	**63**	**50**	**53**

Table 82: Access to a car by town centre

		Location						
	Total %	Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
Yes, but used another mode	50	35	48	55	61	43	59	53
No, no access to a car or van	49	65	52	45	39	56	39	45
Refused	1	0	0	0	0	2	2	2
Base	**354**	**48**	**46**	**51**	**49**	**63**	**44**	**53**

Table 83: Mobility by town centre

		Location						
	Total %	Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
No, none	96	96	88	98	98	95	96	100
Mobility impairment	1	0	6	0	0	0	4	0
Visual impairment	1	2	0	0	2	2	0	0
Hearing impairment	1	0	2	0	0	0	2	0
Learning disability	0	0	0	0	0	0	0	0
Mental health condition	1	2	2	0	2	2	0	0
Serious long term illness	1	0	2	2	2	0	2	0
Other	*	0	0	0	0	2	0	0
Refused	0	0	0	0	0	0	0	0
Base	**362**	**48**	**48**	**51**	**49**	**63**	**50**	**53**

Table 84: Whether carrying anything by town centre

		Location						
	Total %	Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
Shopping bag(s)/shopping trolley	25	27	27	12	39	25	30	15
Buggy/pram	*	0	0	0	0	0	2	0
Carrying a child/baby	0	0	0	0	0	0	0	0
Suitcase/rucksack	40	56	35	61	22	33	28	42
Other large/awkward object	1	0	2	0	0	2	2	0
Nothing	35	21	35	27	39	41	38	43
Base	**362**	**48**	**48**	**51**	**49**	**63**	**50**	**53**

Purpose of visit

Table 85: Main purpose mentioned for visiting the town centre by town centre

		Location						
	Total %	Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
Shopping	52	63	44	37	73	51	50	47
Using service	15	10	19	16	8	21	26	2
Using public amenity	4	2	4	14	0	8	0	0
Eating/drinking out	6	10	4	6	6	2	10	2
Other social/leisure	5	4	6	8	4	8	2	4
Delivering goods	1	0	0	0	0	0	0	6
Window shopping	*	0	2	0	0	0	0	0
Personal business	3	2	4	8	0	3	2	2
General recreation	1	0	0	2	0	2	2	0
Live here	2	0	2	0	6	0	0	4
Work here	8	6	10	2	0	3	6	28
Travelling through the area	1	0	0	4	0	2	2	0
Visiting friends and relatives	3	2	4	4	2	2	0	6
Base	**362**	**48**	**48**	**51**	**49**	**63**	**50**	**53**

Mode of Access to area today

Table 86: Modes used to access each area by town centre

		Location						
	Total %	Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
Bicycle	99	100	100	100	100	100	100	91
Barclays Cycle Hire	1	0	0	0	0	0	0	9
Base	**362**	**48**	**48**	**51**	**49**	**63**	**50**	**53**

Frequency of visiting centre

Table 87: Frequency of visiting town centre by town centre

		Location						
	Total %	Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
5 or more days a week	25	23	27	24	22	25	24	28
3 or 4 days a week	20	17	25	24	12	25	32	6
2 days a week	17	10	25	14	22	14	18	13
Once a week	19	29	17	20	29	11	16	13
Once a fortnight	11	13	4	10	12	11	4	21
About once a month	5	2	0	6	0	8	6	9
Less than once a month	2	2	0	2	0	5	0	4
First time	2	4	2	2	2	0	0	6
Weekly mean	2.7	2.4	3.1	2.7	2.4	2.7	3.0	2.3
Base	**362**	**48**	**48**	**51**	**49**	**63**	**50**	**53**

Average Spend

Table 88: Average spend today by town centre

		Location						
	Total %	Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
Nothing	15	10	10	14	8	29	12	19
Under £1	1	2	2	2	0	0	2	0
£1-£4.99	13	10	21	31	4	11	8	6
£5-£9.99	14	10	21	18	12	10	24	6
£10-£14.99	10	15	13	8	12	8	8	11
£15-£19.99	9	8	4	6	14	8	14	9
£20-£29.99	10	10	17	4	16	13	2	9
£30-£49.99	9	10	6	2	18	13	12	4
£50-£74.99	7	4	2	2	8	5	12	13
£75-£99.99	2	2	0	4	2	3	2	0
£100-£149.99	3	13	0	0	0	0	2	9
£150-£199.99	1	0	2	2	2	0	0	2
£200+	2	0	2	2	2	2	0	8
Don't know	2	4	0	6	0	0	2	4
Mean (£)	**28.11**	**32.51**	**20.69**	**19.54**	**31.53**	**20.95**	**22.97**	**49.71**
Std. Deviation	43.87	40.65	40.37	43.06	40.48	33.72	26.83	66.57
Base	354	46	48	48	49	63	49	51

Table 89: Average spend per visit by town centre

		Location						
	Total %	Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
Nothing	5	8	2	4	2	5	6	6
Under £1	*	0	0	0	0	0	2	0
£1-£4.99	8	2	13	24	4	8	2	4
£5-£9.99	14	4	25	18	8	17	12	13
£10-£14.99	13	25	2	10	18	17	12	6
£15-£19.99	11	6	13	8	20	13	10	6
£20-£29.99	18	27	13	10	20	22	22	11
£30-£49.99	9	13	10	4	12	8	6	13
£50-£74.99	9	8	6	4	12	3	16	11
£75-£99.99	4	2	13	0	2	0	4	6
£100-£149.99	2	2	0	4	0	0	2	8
£150-£199.99	1	2	0	0	0	0	2	0
£200+	1	0	0	0	0	3	0	0
Don't know	6	0	4	16	0	3	4	17
Mean (£)	**28.28**	**29.64**	**27.93**	**18.84**	**26.02**	**24.55**	**32.93**	**38.98**
Std. Deviation	32.38	31.96	28.37	27.91	19.62	39.55	34.29	36.98
Base	339	48	46	43	49	61	48	44

Table 90: Average total spend per week by town centre

		Location						
	Total %	Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
Nothing	5	8	2	5	2	5	6	7
Under £5	7	4	4	16	4	10	2	11
£5-£19.99	20	17	24	35	22	18	19	9
£20-£49.99	28	33	24	23	29	23	19	48
£50-£99.99	22	19	24	14	24	26	33	14
£100+	17	19	22	7	18	18	21	11
Mean (£)	**69.54**	**80.67**	**74.55**	**34.44**	**60.42**	**67.86**	**92.03**	**74.38**
Std. Deviation	115.04	151.08	79.99	47.26	59.34	109.52	151.91	149.08
Base	339	48	46	43	49	61	48	44

Table 91: Average total spend per month by town centre

	Total %	Location						
		Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
Nothing	5	8	2	5	2	5	6	7
Under £5	2			5		5	2	5
£5-£19.99	4	2	4	12	4	5		5
£20-£49.99	9	8	13	14	6	11	2	5
£50-£99.99	15	13	11	23	20	7	19	16
£100+	65	69	70	42	67	67	71	64
Mean (£)	**278.15**	**322.75**	**298.2**	**137.75**	**241.69**	**271.81**	**368.13**	**296.98**
Std. Deviation	460.17	604.29	319.96	189.05	237.35	437.93	607.64	596.62
Base	339	48	46	43	49	61	48	44

Improvements to town centres

Table 92: Main priority for improvements in each area by town centre

	Total %	Location						
		Croydon %	Bexley-heath %	Bromley %	Ealing %	Harrow %	Kingston %	Oxford St/ Regent St %
More shops	9	4	15	8	12	5	12	8
Better range of shops	22	27	27	8	47	24	12	9
Improve shops/better quality shops	19	17	25	8	43	14	10	19
Longer shop opening hours	17	23	33	10	8	13	8	25
More leisure facilities	23	25	35	12	24	16	24	28
More pleasant/greener environment	27	44	42	12	20	21	14	36
Cleaner streets	20	31	31	10	10	22	18	21
Reduce pollution	19	10	29	10	10	16	6	51
More public spaces	18	23	23	18	10	8	8	36
Remove undesirable element/more policing	13	10	33	10	6	13	8	11
Less traffic	22	15	23	22	20	10	14	55
High street should be pedestrianised	8	4	4	6	14	5	8	17
Improve pedestrian environment	5	2	0	6	12	8	0	6
More/easier parking	9	4	15	2	16	6	12	6
Better bus service	6	6	8	4	4	10	4	6
Improve access to bus stop locations	3	6	4	0	0	2	2	6
Improve cycle facilities	42	31	44	41	27	57	34	55
Other	2	0	0	4	4	3	4	0
Nothing	10	10	2	22	2	13	14	4
Don’t know	2	2	2	0	2	2	0	4
Base	**362**	**48**	**48**	**51**	**49**	**63**	**50**	**53**