

**Town centre study  
2009**

**08213**

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Research conducted by Synovate

# 1. Executive summary

## Introduction

This report has been commissioned for Transport for London (TfL) in order to gain an understanding in of the contribution made by bus users to the economic health and viability of London town centres. In total, 4,907 face to face interviews were conducted with people using 15 town centres. These included town centres in central London (Oxford Street, Kensington High Street), main suburban centres (Bromley, Clapham Junction, Croydon, Enfield, Kingston, Richmond, Romford, Wood Green) and other suburban centres (Camberwell, Chingford, Mare Street Hackney, Neasden, Wembley).

## Key headlines for buses

Buses were the most used mode of transport to town centres. Bus users spent more in town centres in an average month than car drivers. Satisfaction amongst bus users was generally good. General support for bus provision to town centres was high. Improvement to bus route frequency and speed could encourage further bus use.

## Who used the town centres?

The majority of visitors to most town centres lived and/or worked more than ten minutes walk from the town centre. More visitors to other suburban town centres lived / worked within ten minutes walk compared to visitors to other types of town centres.

The socio-demographic profile of town centre visitors varied significantly by town centre, with visitors to central London town centres particularly different from those to main and other suburban town centres.

Three quarters visited their town centre once a week or more often. This proportion was highest in other suburban town centres.

### **How did they get there?**

Overall, bus was the most used mode for getting to the town centres. Buses were used by nearly four in ten town centre visitors. Bus use was significantly higher to main and other suburban town centres than to central London centres (where the Underground was most used).

Over three quarters ever used the bus to visit the town centre, even if they did not do so on the day of interview. Half had visited the town centre by bus at least once a week. Just over a fifth said they never used the bus to visit the town centre. Visitors to central London town centres were less likely to have used the bus.

A quarter of visitors walked to the town centres. Those living or working less than ten minutes walk from the town centre were more likely to have walked. One in seven drove. Only one in fifty used a bicycle.

People who walked visited the centres most frequently: more than half visited at least five days a week. Just over a quarter of bus users visited the town centres at least five days a week. Three quarters of bus users visited at least once a week.

### **What did they do there?**

Shopping was the most mentioned reason for visiting town centres. Over three quarters were doing shopping, and this was the main reason for visiting for three fifths. More visitors were shopping for food than for any other type of shopping. Other reasons for visiting town centres were to eat out (mentioned by a quarter) or to use services e.g. a bank or post office (mentioned by a fifth). Other reasons for visiting varied significantly by type of town centre.

A third of visitors said that they were planning to spend an hour at the town centre. One half were going to spend between one and three hours. A fifth were planning to spend longer. Time spent at town centres varied by town centre: on average, most

time was (planned to be) spent at central London town centres, and least time at other suburban town centres.

### **How much did they spend there?**

Across an average month, average spend per town centre visitor was £276. Average spend per visit was significantly different across different town centres; visitors to central London centres spent more per visit but visited less frequently, while visitors to other suburban centres spent less per visit but visited more frequently.

Bus users had a significantly higher spend per month compared with Underground users and train users, and somewhat higher than car users.

### **How could town centres be improved?**

Many town centre visitors mentioned improvements directly related to travel and transport. Having less traffic was mentioned by around one in three. Reducing pollution was mentioned by one in six. Better bus services and better car parking were each mentioned by one in seven. Improving the pedestrian environment and wanting the high street to be pedestrianised were each mentioned by one in ten.

Other improvements to town centres were: cleaner streets (mentioned by one in three), improving the shops, having more leisure facilities, removing 'undesirables', having more public spaces and a more pleasant or a greener environment (each mentioned by one in five); longer shop opening hours (one in six) and having more shops (one in ten).

### **What were attitudes to bus use, and how could bus use be increased?**

Four in ten said that there were no improvements that could be made to bus services that would encourage them to use buses (more). Making buses more regular, reliable, faster and direct were most mentioned as improvements that would encourage bus use.

Most town centre visitors (around seven in ten) agreed that bus stops are conveniently located, that goods vehicles should not be allowed in bus lanes, and that there should be stricter enforcement of illegal parking in bus lanes. Fewer (one third or less) agreed that taxis should not be allowed in bus lanes, and that bus lanes are a nuisance to all other road users.

### **Key headlines for Oxford Street**

Compared to almost all other town centres, Oxford Street...

- ...was visited more by those who lived / worked more than ten minutes walk away (85%);
- ...was visited, on average, less frequently (6 times per visitor per month);
- ...visitors were significantly more likely to have travelled to the centre by the Underground (61%), and less likely to have used the bus (24%), to have walked (4%) or used a car (1%);
- ...visitors spent longest in the town centre (more than 2 hours on average);
- ...was most used for (clothes) shopping, eating / drinking out, and other social / leisure reasons (also, two fifths (44%) of visitors said Oxford Street was the best shopping area, a fifth (22%) said it had a bigger range of shops, and a fifth (21%) mentioned visiting a particular shop);
- ...visitors spent more per visit (£57 on average), but spent less per month (£235 on average);
- ...visitors were most likely to suggest improvements to the town centre (92%), and were specifically most likely to mention less traffic (59%) and more public spaces (43%);
- ...visitors were most likely to suggest faster (40%) and more direct (35%) bus routes as ways of increasing bus usage to Oxford Street;

- ...visitors were not aware of (18% were) and generally not affected (5% were) by the changes to travel at Tottenham Court Road.

**PLEASE NOTE:**

The monthly spend figures have been updated since the original issue of this report in April 2009.

The overall story remains the same, with the average spend per visit by mode unchanged, however the average **monthly** spend figures by mode have changed.

For further information please contact TfL Customer Research.



## 2. Background to and objectives of the research

### 2.1 Introduction

Research conducted by Transport for London (TfL) in 2003-04 sought to establish the contribution made by bus users to the economic health and viability of town centres across London. This showed that bus users were at least as great contributors to the local economy as car users, and further showed that the majority of town centre users were widely supportive of measures related to bus priority.

TfL wished to repeat this study in 2009 for 15 London town centres. As well as updating knowledge from the previous study, findings from this research will be used by the TfL Bus Priority team to develop business cases to develop the bus services and infrastructure.

### 2.2 Research objectives

The objectives for the research for this year were as follows:

- Determine the shopping behaviour, frequency and spend of bus customers in specified town centres;
- Compare the shopping behaviour and financial contribution of bus customers to those of car users and users of other modes;
- Explore perceptions of different modes, and specific attitudes to bus use and bus service provision.

## 3. Research details

### 3.1 Methodology

Face to face in-street interviews were conducted with people at fifteen London town centres. Interviews were conducted at different times and on different days of the week, including weekends.

Interviews were 10-15 minutes duration. See Appendix 5.1 for the full questionnaire.

### 3.2 Sample

Interviews were conducted with people who were using the town centre for some reason, e.g. shopping, using a service, personal business. Those passing through the area or those who lived or worked in the area were not included if they were not using the town centre for any particular reason. See Appendix 5.2 for further details of sample structure.

At least 300 interviews were conducted in fifteen London town centres. A total of 4,907 interviews were conducted. See Appendix 5.3 for numbers of interviews achieved by town centre. See Appendix 5.4 for profiles of respondents.

### 3.3 Town centre locations

The fifteen town centres included in this research were:

- **Central London** town centres: Oxford Street, Kensington High Street
- **Main suburban** town centres: Bromley, Clapham Junction, Croydon, Enfield, Kingston, Richmond, Romford, Wood Green

- **Other suburban** town centres: Camberwell, Chingford, Mare Street Hackney, Neasden, Wembley.

### **3.4 Timescales**

Fieldwork was conducted between 17<sup>th</sup> February and 16<sup>th</sup> March 2009.

## 4. Main findings

### 4.1 Who used the town centres?

#### 4.1.1 Overview

The majority of visitors to most town centres lived and/or worked more than ten minutes walk from the town centre. More visitors to other suburban town centres lived / worked within ten minutes walk compared to visitors to other types of town centres.

The socio-demographic profile of town centre visitors varied significantly by town centre, with visitors to central London town centres particularly different from those to main and other suburban town centres.

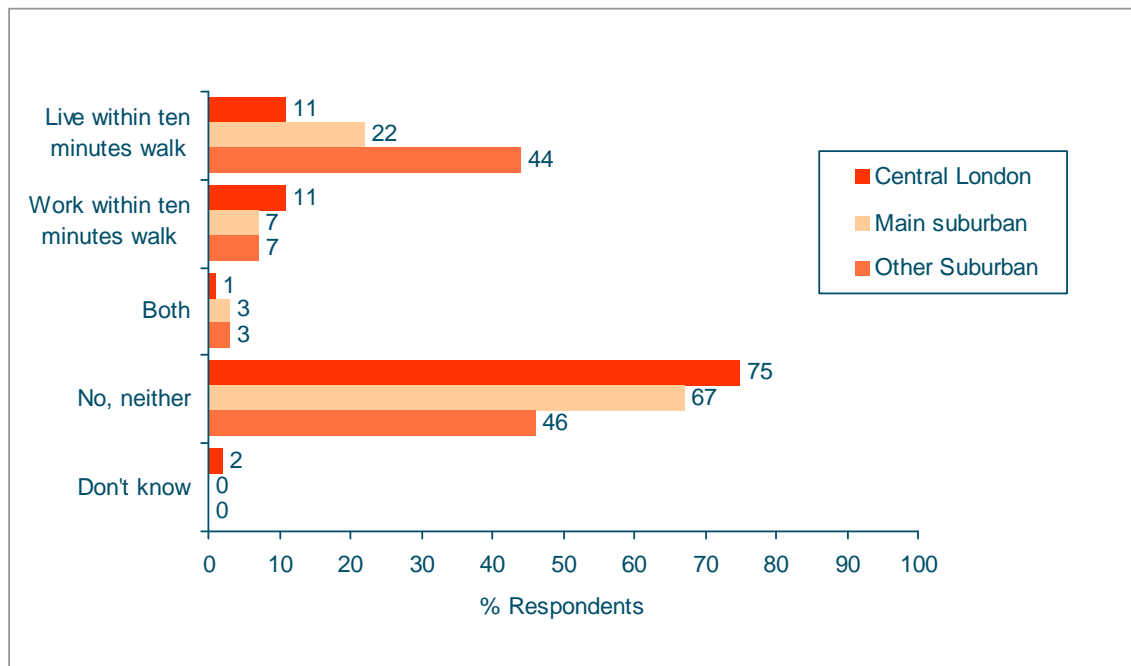
Three quarters visited their town centre once a week or more often. This proportion was higher in other suburban town centres.

#### 4.1.2 Where did visitors come from?

Overall, six out of ten (62%) of town centre visitors lived and/or worked more than ten minutes walk from the town centre. Almost three out of ten (30%) lived within ten minutes walk of the town centre. One out of ten (11%) worked within ten minutes walk of the town centre.

This profile varied significantly across the different town centre types. Three quarters of visitors to central London town centres lived and/or worked more than ten minutes walk away. Two thirds of visitors to main suburban centres lived and/or worked more than ten minutes walk away. By contrast, just under half of visitors to other suburban centres lived and/or worked more than ten minutes walk away; more visitors to these centres lived or worked within ten minutes walk.

### Proximity to town centre, by type of town centre:



Base: All respondents (4907), Central London (763), Main Suburban centres (2561), Other Suburban Centres (1583)

Oxford Street (84%), Croydon (79%), Romford, Bromley (both 77%) and Kingston (76%) were most likely to attract visitors from more than ten minutes walk away. Only four in ten (40%) of those visiting Camberwell were from a wider catchment area. (Also see Appendix 5.5.1 for full details of proximity to town centre, by town centre.)

#### 4.1.3 Who were the visitors?

The socio-demographic profile of visitors varied significantly by town centre (see Appendix 5.4). The most notable differences in visitor profile by type of town centre were as follows:

- **Gender:**

More visitors were female: almost three fifths (58%) were;

Central London town centres visitors were almost equally as likely to be female as male.

- **Age:**

Visitors to central London town centres were significantly younger. Two thirds (64%) of central London centre visitors were ages 14-35, two fifths (42% and 41% respectively) of main and other suburban town centres were ages 14-35.

- **Ethnicity:**

Visitors to main suburban town centres were most likely to be white (four fifths – 79% – were). Visitors to other suburban town centres were least likely to be white (three fifths – 58% - were). A similar proportion of central London visitors (61%) were white.

- **Working status:**

Visitors to central London town centres were more likely to be working (two thirds – 66% – were). Just over a half of main and other town centre visitors (53% and 52% respectively) were working.

- **Social grade:**

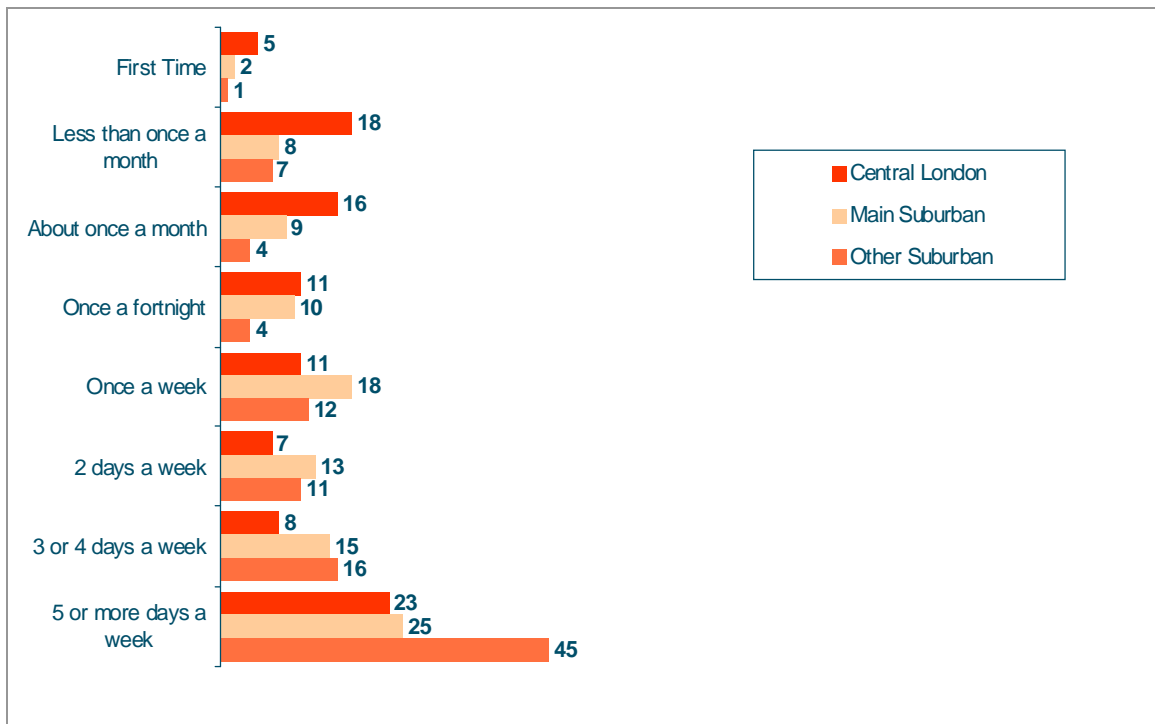
Visitors to central London town centres were most likely to be social grades ABC1 (two thirds – 68% – were). Three fifths (60%) of main suburban centre visitors were ABC1. Half (52%) of other suburban centre visitors were ABC1.

#### **4.1.4 How often did they visit?**

Most visited the town centre on a regular basis. Three quarters (73%) visited at least once a week. Just under one in ten visited either once a fortnight (8%), once a month (8%) or less often (9%).

Other suburban town centres were visited most frequently: more than eight out of ten visited at least once a week. Main and suburban town centres were visited more frequently than central London town centres. (Also see Appendix 5.5.2 for full details of frequency of visit to town centre, by town centre.)

**Frequency of visits to town centre, by type of town centre:**



Base: Central London (763), Main Suburban (2561), Other Suburban (1583)

Those living and / or working within ten minutes walk of the town centres were more likely to visit them more frequently. Consistent with this, those who walked to the town centres visited them most frequently. Almost all (95%) visited the town centre at least once a week, and more than half (55%) visited at least five days a week.

Bus users visited the centres frequently: three quarters visited at least once a week, and just under one third (30%) visited at least five days a week. Bus users visited the town centres more frequently, on average, than other public transport users and car or taxi users.

### Frequency of visiting town centre, by mode used:

	Total	Bus	Walk	Car	Tube	Train	Bicycle
	%	%	%	%	%	%	%
5+ days a week	31	28	55	14	20	24	37
3 or 4 days a week	15	16	18	12	8	8	14
2 days a week	12	13	12	12	6	5	12
Once a week	15	17	10	21	9	14	18
Once a fortnight	8	9	2	12	12	10	10
About once a month	8	8	1	13	16	15	7
Less than once a month	9	7	2	15	20	19	3
First time	2	1	0	2	8	5	0
<b>Mean: Days per month</b>	<b>11</b>	<b>10</b>	<b>16</b>	<b>7</b>	<b>7</b>	<b>8</b>	<b>12</b>
<b>Base</b>	<b>4907</b>	<b>1862</b>	<b>1229</b>	<b>854</b>	<b>480</b>	<b>322</b>	<b>105</b>

## 4.2 How did they get there?

### 4.2.1 Overview

Overall, bus was the most used mode for getting to the town centres. Buses were used by nearly four in ten town centre visitors. Bus use was significantly higher to main and other suburban town centres than to central London centres.

Over three quarters ever used the bus to visit the town centre, even if they did not do so on the day of interview. Half had visited the town centre by bus at least once a week. Just over a fifth said they never used the bus to visit the town centre. Visitors to central London town centres were less likely to use the bus.

A quarter of visitors walked to the town centres. Those living or working less than 10 minutes walk from the town centre were more likely to have walked. One in seven drove. Only one in fifty used a bicycle.

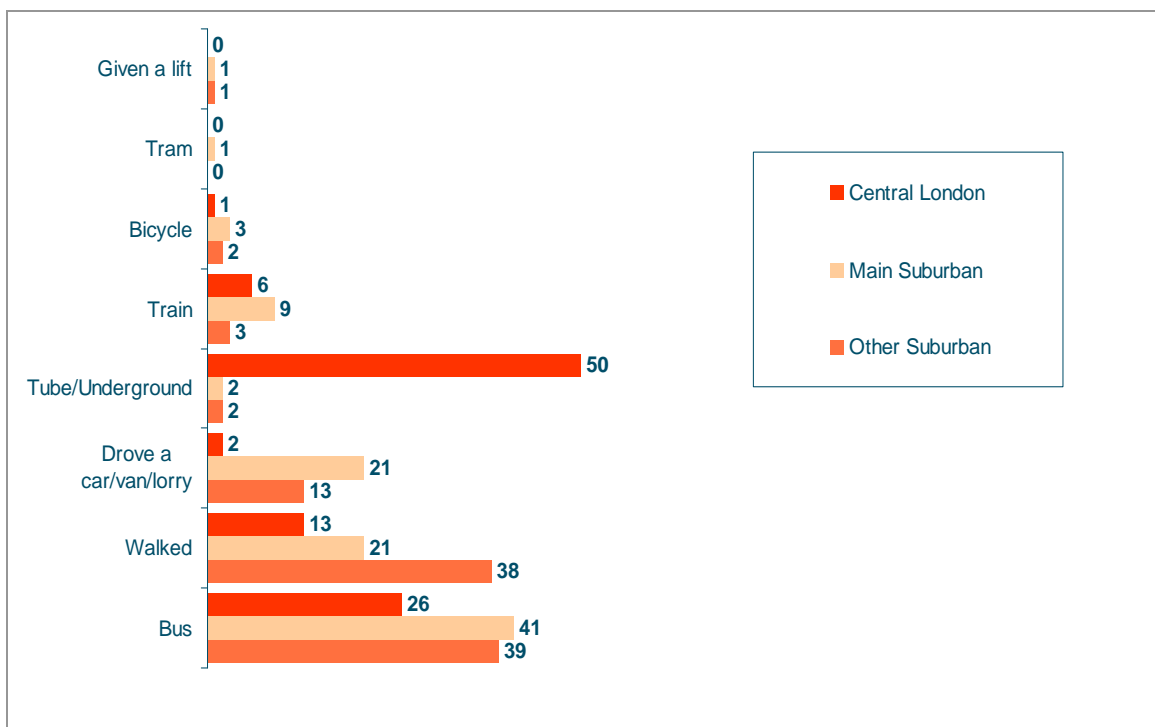


People who walked visited the centres most frequently: more than half visited at least five days a week. Just over a quarter of bus users visited the town centres at least five days a week. Three quarters of bus users visited at least once a week.

#### 4.2.2 What modes of transport were used?

Overall, bus was the most used mode for getting to the town centres. Buses were used by nearly four in ten town centre visitors. Bus use was significantly higher to main and other suburban town centres than to central London centres.

#### Mode used to town centre, by type of town centre:



Base: Total (4907), Central London (763), Main Suburban (2561), Other Suburban (1583)

Bus use was particularly high to Camberwell (by 56% of visitors), Wood Green (51%) and Wembley (50%). Bus use was particularly low to Chingford (22%) and Oxford

Street (24%). (Also see Appendix 5.5.3 for full details of mode used to town centre, by town centre.)

A quarter of visitors to the town centres walked there. This rose to two thirds of those who lived or worked within a ten minute walk of the town centre (also see Appendix 5.5.4 for full details of mode used to town centre, by proximity to town centre.).

Significantly more visitors walked to other suburban town centres (consistent with the higher proportion of visitors who lived / worked closer to these town centres). Walking was the most used means of travel by visitors to Chingford (44% walked), Neasden (43%) and Mare Street Hackney (38%). Only one in fifty (2%) cycled, on average. A higher proportion (5%) cycled to Mare Street Hackney, Kingston and Richmond.

Underground use was almost exclusively to central London town centres. (Very few of the main or other suburban town centres had close access by Underground.)

Very few drove used a car to get to central London town centres. Around one in six used a car to get to main or other suburban town centres. Car use was highest to Romford (38% used a car). Car usage was lowest to Oxford Street (1%), Kensington High Street (4%), Camberwell (5%) and Clapham Junction (5%).

#### **4.2.3 Who used these modes of transport?**

Bus users were more likely to be younger (particularly ages 14 to 24) and lower social grades (DE), compared to the profile of town centre visitors overall.

Of all different mode users: Underground users and cyclists were most likely to be male; Underground users were most likely to be younger (ages 14 to 35); cyclists, train users and Underground users were most likely to be higher social grades (AB).

**Profile of mode users:**

	<b>Total</b>	<b>Bus</b>	<b>Walk</b>	<b>Car</b>	<b>Tube</b>	<b>Train</b>	<b>Bicycle</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Male	42	39	41	40	54	44	53
Female	58	61	59	60	46	56	47
14 to 24	23	30	20	12	33	25	14
25 to 34	22	20	23	17	35	27	26
35 to 44	20	16	21	25	16	17	38
45 to 54	12	11	12	20	6	13	10
55 to 64	11	11	12	17	6	9	9
65+	10	12	12	8	2	8	3
AB	23	16	25	29	27	30	36
C1C2	52	53	47	56	56	54	47
DE	22	27	25	14	14	13	16
<b>Base</b>	<b>4907</b>	<b>1875</b>	<b>1233</b>	<b>825</b>	<b>482</b>	<b>322</b>	<b>101</b>

**4.2.4 Why were these modes of transport used?**

Being cheaper, quicker, and more convenient were the main reasons for using buses (each mentioned by around one third of bus users). Bus users to central London centres were more likely to use buses because they were less expensive. Bus users to other suburban centres were more likely to use buses because they were quicker and /or more direct. Bus users to Camberwell, Clapham Junction, Mare Street Hackney, Wood Green and Kensington High Street town centres were more likely to use buses because they were quicker. (Also see Appendix 5.5.5 for main reason for using bus, by town centre.)

**Reasons for using mode, by mode used:**

	<b>Total</b>	<b>Bus</b>	<b>Walk</b>	<b>Car</b>	<b>Tube</b>	<b>Train</b>	<b>Bicycle</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Quicker	46	33	37	55	84	71	59
Easier / more convenient	31	31	16	46	37	36	31
More direct	28	30	17	28	43	43	31
Cheaper / less expensive	23	36	20	8	7	11	54
Live very close by	14	4	45	1	1	1	16
Need / enjoy exercise / health	12	1	37	1	1	2	72
No car / can't drive	11	20	7	1	3	9	4
More relaxing / comfortable	11	11	7	17	14	14	14
Avoids parking difficulties	9	12	8	3	9	14	22
Only method possible	8	13	4	4	6	10	2
Safer	5	6	2	6	7	5	3
Going to more than one place	5	3	2	16	3	5	8
Had heavy things to carry	5	3	1	19	3	2	0
Weather issues	3	2	6	2	0	1	5
Travelling with children	3	2	2	9	3	1	0
Avoid the Congestion Charge	1	1	0	0	3	3	1
Free Pass	1	1	0	0	1	0	0
Don't know	1	1	1	3	0	0	0
<b>Base</b>	<b>4907</b>	<b>1875</b>	<b>1233</b>	<b>825</b>	<b>482</b>	<b>322</b>	<b>101</b>

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

All other mode users were most likely to say the mode they used was quicker. They were also more likely than bus users to give this reason. Underground and train users were most likely to have used these modes because they were quicker. Over half of car users considered driving to be quickest. Car users were more likely than other mode users to say this mode was more convenient.

The main reason given for walking was because they lived close by (45%). Over a third of walkers said that it was quicker (37%) and because they needed / enjoyed the exercise (37%). The main reason given for cycling was enjoying the exercise (72%). More than half of cyclists said cycling to the town centre was quicker (59%) and cheaper (54%).

#### 4.2.5 What other modes of transport were sometimes used?

Buses were the most used 'other' mode. More than a third of tube users (40%), train users (39%) and car users (34%) also sometimes used buses to travel to the town centres. Around half of walkers (48%) and cyclists (51%) also sometimes used the bus.

#### Other modes used to town centre, by mode used:

	Total	Bus	Walk	Car	Tube	Train	Bicycle
	%	%	%	%	%	%	%
Bus	36	-	48	34	40	39	51
Car / van / lorry	18	19	20	-	8	14	21
Walk	15	17	-	14	5	10	20
Train	12	13	10	11	10	-	8
Tube / Underground	10	11	7	5	-	15	4
Bicycle	3	3	4	3	1	2	-
Taxi / minicab	2	3	1	2	2	1	1
Tram	1	1	0	0	0	1	1
Motorbike / moped / scooter	1	0	0	1	0	1	0
None / Nothing	8	9	7	10	4	8	6
<b>Base</b>	<b>4907</b>	<b>1862</b>	<b>1229</b>	<b>854</b>	<b>480</b>	<b>322</b>	<b>105</b>

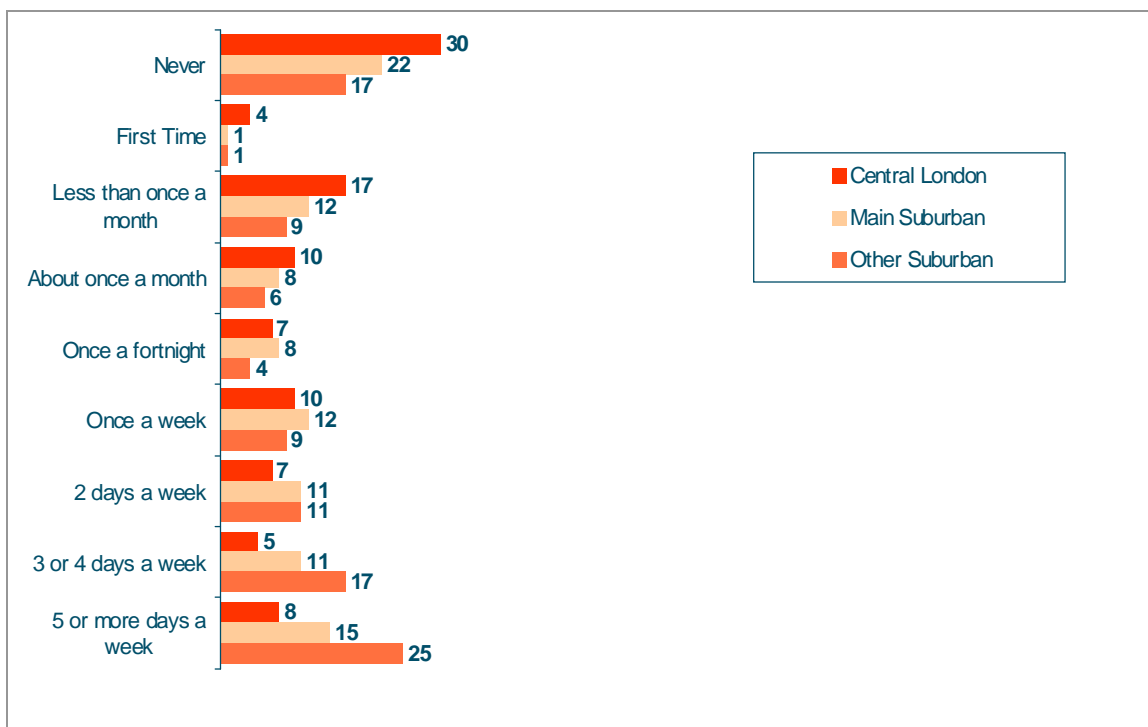
Note: More than one answer may be given, so percentages may add up to more than 100%.

One fifth of bus users (19%) also sometimes used a car to the town centre. Slightly fewer (17%) also sometimes walked.

#### 4.2.6 How often were buses used?

Over three quarters ever used the bus to visit the town centre, even if they did not do so on the day of interview. Half had visited the town centre by bus at least once a week. Just over a fifth said they never used the bus to visit the town centre.

#### Frequency of using bus to town centre, by type of town centre:



Base: Central London (763), Main Suburban (2561), Other Suburban (1583)

Frequency of using the bus was significantly different by town centre. Bus use was highest and most frequent to other suburban locations: more than four out of five (83%) ever used the bus, more than three out of five (62%) used the bus at least once a week. Bus use was lowest and least frequent to central London town centres (70% ever used the bus, 30% used the bus at least once a week). Broadly consistent with this, bus use was highest to Camberwell, Mare Street Hackney, Neasden, Wembley,

and Wood Green. Bus use was lowest to Romford and Oxford Street. (See Appendix 5.5.6 for full details of frequency of using bus to town centre, by town centre.)

**Frequency of using bus to town centre, by town centre:**

	Ever use bus	Use bus at least once a week	Never use bus	Base
	%	%	%	n
<b>Total</b>	<b>78</b>	<b>50</b>	<b>22</b>	<b>4907</b>
Camberwell	93	76	7	<b>320</b>
Wembley	87	67	13	<b>324</b>
Mare Street Hackney	84	65	16	<b>310</b>
Wood Green	86	65	14	<b>304</b>
Neasden	84	64	16	<b>312</b>
Clapham Junction	94	61	6	<b>332</b>
Croydon	84	51	16	<b>323</b>
Richmond	73	47	27	<b>331</b>
Kensington	74	45	26	<b>312</b>
Enfield	71	44	29	<b>309</b>
Bromley	71	43	29	<b>321</b>
Chingford	68	42	32	<b>317</b>
Kingston	79	41	21	<b>320</b>
Romford	63	35	37	<b>321</b>
Oxford Street	67	20	33	<b>451</b>

*Note: This was asked of all town centre visitors. Those that did not mention bus at 'other modes to town centre' may have given an answer here – i.e. saying they used the bus infrequently.*

Bus users were most frequent users of the bus overall: three quarters (75%) used the bus at least once a week. Almost three fifths of walkers (58%) also used the bus at least once a week. Car users were least likely to use the bus, but around one in six (17%) used the bus at least once a week.

**Frequency of using bus to town centre, by mode used:**

	Total	Bus	Walk	Car	Tube	Train	Bicycle
	%	%	%	%	%	%	%
<i>At least once a week</i>	50	75	58	17	20	22	31
5+ days a week	18	31	17	2	3	8	4
3 or 4 days a week	12	18	15	4	4	3	3
2 days a week	10	13	14	4	5	4	11
Once a week	11	12	11	7	8	8	13
Once a fortnight	7	8	5	4	5	8	10
About once a month	8	8	5	10	9	9	12
Less than once a month	12	7	9	18	20	18	18
First time	1	1	0	1	6	2	0
Never	22	0	22	49	39	41	25
Don't know	1	0	1	2	1	0	3

*Note: This was asked of all town centre visitors. Those that did not mention bus at 'other modes to town centre' may have given an answer here – i.e. saying they used the bus infrequently.*



Bus use increased slightly compared to the claimed frequency of use of twelve months ago. There was a 2% increase in those that travel by bus at least once a week (from 48% to 50%), and a 2% increase in those using buses at all (from 76% to 78%).

#### Frequency of bus use currently and 12 months ago:

	Current bus use	Bus use 12 months ago
	%	%
<i>At least once a week</i>	50	48
5+ days a week	18	17
3 or 4 days a week	12	11
2 days a week	10	9
Once a week	11	10
Once a fortnight	7	6
About once a month	8	8
Less than once a month	12	12
First time	1	1
Never	22	24
Don't know	1	2
<b>Mean: No. times per month</b>	<b>7.1</b>	<b>7.0</b>
<b>Base</b>	<b>4907</b>	<b>4907</b>

## 4.3 What did they do there?

### 4.3.1 Overview

Shopping was the most mentioned reason for visiting town centres. Over three quarters were doing shopping, and this was the main reason for visiting for three fifths. More visitors were shopping for food than for any other type of shopping. Other reasons for visiting town centres were to eat out (mentioned by a quarter) or to use services e.g. a bank or post office (mentioned by a fifth).

A third of visitors said that they were planning to spend an hour at the town centre. One half were going to spend between one and three hours. A fifth were planning to spend longer. Time spent at town centres varied by town centre: on average, most time was (planned to be) spent at central London town centres, and least time at other suburban town centres.

#### 4.3.2 What were the reasons for visiting?

Shopping was the most mentioned reason for visiting town centres. Over three quarters were doing shopping, and this was the main reason for visiting for three fifths. More visitors were shopping for food than for any other type of shopping. Other reasons for visiting town centres were to eat out (mentioned by a quarter) or to use services e.g. a bank or post office (mentioned by a fifth).

#### Purpose(s) for visiting town centre (prompted):

	All purposes	Main purpose
	%	%
Shopping	76	58
Eating / drinking out	23	7
Using services e.g. bank, post office, hairdresser	20	10
Live here	13	2
Window shopping	10	2
Other social / leisure	9	5
Using public amenity e.g. court, police station	7	4
Visiting friends and relatives	6	2
Personal business	5	4
General recreation	3	1
Travelling through the area	2	1
Dropping off/picking up friends or relative	1	<1
Work here	1	3
School college	1	<1
<b>Base</b>	<b>4907</b>	

Shopping was the main reason for visiting all types of town centre. However, other reasons for visiting different types of town centre varied. Most notably, visitors to other suburban town centres were most likely to mention using services. (See Appendix 5.5.7 for full details of main purpose for visiting town centre, by town centre.)

**Purpose(s) for visiting town centre (prompted), by type of town centre:**

	Central London		Main Suburban		Other Suburban	
	All purposes	Main purpose	All purposes	Main purpose	All purposes	Main purpose
	%	%	%	%	%	%
Shopping	76	63	82	65	68	45
Eating / drinking out	21	5	24	6	21	8
Using services	5	3	19	9	28	16
Live here	7	4	8	1	24	4
Window shopping	8	3	11	2	7	1
Other social / leisure	14	6	8	4	8	5
Using public amenity	3	2	6	3	10	5
Visiting friends and relatives	5	1	6	2	6	3
Personal business	6	5	5	3	6	4
General recreation	4	1	2	1	3	1
Travelling through the area	1	<1	2	1	2	1
Dropping off / picking up	1	<1	1	<1	1	1
Work here	4	6	<1	2	1	3
School college	1	<1	1	<1	1	<1
Delivering goods	0	0	<1	<1	1	<1
Buying petrol	<1	0	<1	0	<1	<1
Training	<1	<1	0	<1	<1	<1
<b>Base</b>	<b>763</b>	<b>763</b>	<b>2561</b>	<b>2561</b>	<b>1583</b>	<b>1583</b>

The purpose for visiting did not vary greatly by visitors' proximity to town centre, or the frequency by which they visited the town centre (see Appendices 5.5.8 and 5.5.9 respectively for full details).

### 4.3.3 What types of shops and services were used?

Around two fifths of visitors were shopping for food or groceries (42%), just over a third were shopping for clothing (36%). Around one in six were visiting the town centre for services such as dry cleaning, the post office and the travel agent, or to eat out in a café or restaurant (16%).

#### Main types of shops and services (planned to be) used (prompted), by type of town centre:

	Total	Central London	Main suburban	Other suburban
	%	%	%	%
Food / groceries	42	26	40	53
Clothing or footwear	36	58	44	12
Services	17	5	14	26
Eating in a café or restaurant	16	16	17	13
Take-away food	13	12	11	17
Stationery / books / CDs / etc.	12	14	15	5
Pharmaceuticals / toiletries	12	6	12	15
Confectionery, tobacco, newspapers	10	6	8	15
Other household goods	5	4	6	4
Luxury goods	4	4	5	1
Going to cinema, theatre, leisure, etc.	4	3	4	4
Travel pass / mobile top up	4	2	3	6
Drink in a pub or bar	3	4	3	3
Major household goods	3	4	3	3
Wine, beer, spirits	3	3	2	4
<b>Base: All</b>	<b>4907</b>	<b>763</b>	<b>2561</b>	<b>1583</b>

#### **4.3.4 Why was Oxford Street visited specifically?**

Visitors to Oxford Street were asked specifically why they visited this area rather than going somewhere else. More than two fifth (44%) said that it was the best shopping area, a fifth (22%) said Oxford Street had a better and bigger range of shops, or mentioned visiting a particular shop (21%). Meeting people and working near the street were each mentioned by over one in ten (11%). Seven per cent said that Oxford Street has good public transport and that they visited there for 'a trip into town'.

#### **4.3.5 How long did people spend there?**

A third of visitors said that they were planning to spend an hour at the town centre. One half were going to spend between one and three hours. A fifth were planning to spend longer. On average, visitors planned to spend just under two (1.8) hours at the town centre.

Time spent at town centres varied significantly by town centre. On average, most time was (planned to be) spent at central London town centres, and least time at other suburban town centres.

Overall, Underground and train users planned to spend longer at the town centres (2.2 hours) than other mode users (although this was in part related to most of these being visitors to central London or main suburban town centres). Bus users, car users and cyclists planned to spend on average the same amount of time in town centres (1.8 hours). Those who walked spent the least time in town centres (1.5 hours on average).

**Time planned to be spent, by type of town centre:**

	<b>Total</b>	<b>Central London</b>	<b>Main suburban</b>	<b>Other suburban</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Under 5 minutes	<1	<1	<1	1
5-14 minutes	4	1	2	7
15-29 minutes	9	4	6	16
30-59 minutes	18	14	15	25
1-3 hours	50	54	58	35
More than 3 hours	18	26	17	15
Don't know	1	1	1	1
<b>Mean hours spent</b>	<b>1.8</b>	<b>2.1</b>	<b>1.9</b>	<b>1.5</b>
<b>Base</b>	<b>4907</b>	<b>763</b>	<b>2561</b>	<b>1583</b>

**Time planned to be spent, by mode used:**

	<b>Total</b>	<b>Bus</b>	<b>Walk</b>	<b>Car</b>	<b>Tube</b>	<b>Train</b>	<b>Bicycle</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Under 5 minutes	<1	<1	1	<1	1	1	1
5-14 minutes	4	4	6	2	1	4	4
15-29 minutes	9	7	15	7	4	4	8
30-59 minutes	18	19	23	17	11	12	24
1-3 hours	50	52	43	58	52	46	39
More than 3 hours	18	17	12	15	31	33	24
Don't know	1	1	1	1	1	8	0
<b>Mean hours spent</b>	<b>1.8</b>	<b>1.8</b>	<b>1.5</b>	<b>1.8</b>	<b>2.3</b>	<b>2.2</b>	<b>1.8</b>
<b>Base</b>	<b>4907</b>	<b>1862</b>	<b>1229</b>	<b>854</b>	<b>480</b>	<b>322</b>	<b>105</b>

## **4.4 How much did they spend there?**

### **4.4.1 Overview**

Across an average month, average spend per town centre visitor was £276. Average spend per visit was significantly different across different town centres; visitors to central London centres spent more per visit but visited less frequently, while visitors to other suburban centres spent less per visit but visited more frequently.

Bus users had a significantly higher spend per month compared with Underground users and train users, and somewhat higher than car users.

#### 4.4.2 How much did they spend per trip?

The average (planned) spend on the day of the interview was £34. This was in line with the stated typical spend per visit, which was £32<sup>1</sup>. More than four fifths planned to spend less than £50 on the day of the interview. Again this was consistent with the stated typical spend per visit.

#### Planned spend on visit, average spend per visit and average monthly spend:

	Spend today	Average spend per visit	Average total spend per month
	%	%	%
Nothing	5	2	2
Under £1	1	0	0
£1 - £4.99	11	9	1
£5 - £9.99	13	13	2
£10 - £14.99	11	11	3
£15 - £19.99	8	10	1
£20 - £29.99	14	15	4
£30 - £49.99	13	13	7
£50 - £74.99	8	8	14
£75 - £99.99	4	4	2
£100 - £149.99	4	3	11
£150 - £199.99	1	1	13
£200+	2	1	39
<b>Mean</b>	<b>£34</b>	<b>£32</b>	<b>£276</b>
<b>Base</b>	<b>4907</b>	<b>4907</b>	<b>4381*</b>

\*Excludes those that did not give an expenditure or frequency visiting area

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<sup>1</sup> Visitors were asked how much they anticipated spending in the centre during their visit, and also how much they spend on average per visit.



The average (planned) spend per visit varied significantly by type of town centre. Visitors to central London planned to spend on average £50. Visitors to main suburban town centres planned to spend £36 on average. Visitors to other suburban town centres planned to spend on average half of this, £18.

**Planned spend on visit, average spend per visit and average monthly spend, by type of town centre visited:**

	Central London			Main suburban			Other suburban		
	Spend today	Ave. per visit	Ave. per month	Spend today	Ave. per visit	Ave. per month	Spend today	Ave. per visit	Ave. per month
	%	%	%	%	%	%	%	%	%
Nothing	5	1	1	4	1	1	6	3	3
Under £1	1	0	0	0	0	1	2	1	0
£1 - £4.99	7	4	2	9	6	1	18	15	2
£5 - £9.99	11	10	2	11	10	2	17	19	2
£10 - £14.99	7	7	2	9	10	3	16	15	4
£15 - £19.99	6	8	1	9	11	2	9	11	1
£20 - £29.99	12	12	6	15	17	4	14	14	4
£30 - £49.99	14	14	12	16	15	7	8	9	5
£50 - £74.99	11	9	12	10	10	13	4	3	15
£75 - £99.99	9	9	6	4	4	3	1	1	1
£100 - £149.99	6	7	11	4	4	12	1	0	9
£150 - £199.99	2	2	14	2	1	11	0	0	16
£200+	4	3	32	2	1	42	1	0	38
<b>Mean</b>	<b>£48</b>	<b>£50</b>	<b>£247</b>	<b>£38</b>	<b>£36</b>	<b>£304</b>	<b>£19</b>	<b>£18</b>	<b>£244</b>
<b>Base</b>	<b>763</b>	<b>763</b>	<b>646</b>	<b>2561</b>	<b>2561</b>	<b>2296</b>	<b>1583</b>	<b>1583</b>	<b>1439</b>

*Average spend per month excludes those that did not give an expenditure or frequency visiting area*

#### **4.4.3 How much did they spend in an average month?**

The average spend per visitor per month was £276.<sup>2</sup>. Average spend was broadly similar across the different types of town centre: £247 per visitor per month in central London town centres, £304 in main suburban centres and £244 in other suburban centres.

#### **4.4.4 How much did they spend by town centre?**

The highest spend by trip was mentioned by visitors to Oxford Street (£57). Higher average spend per visit was also mentioned by visitors to Croydon (£43), Romford (£42), Bromley (£41) and Kensington High Street (£41). Visitors to Neasden (£13), Chingford (£17), Wembley (£20) and Mare Street Hackney (£21) mentioned the lowest average spend per visit.

Visitors to Oxford Street had one of the lowest average monthly spend of all the town centres (£235 per visitor per month). While visitors spent more at Oxford Street per visit, they did not visit Oxford Street frequently. Conversely, visitors to Wood Green had the highest average monthly spend (£410): they had a relatively low average spend per visit (£33) but a high frequency of visiting.

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<sup>2</sup> An average total spend per month 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 bands of expenditure. In order to calculate the average spend figures mid point values were applied to the bands in line with the previous research. These values are shown in Appendix 5.6.

**Planned spend on visit, by town centre:**

	Bromley	Camberwell	Chingford	Clapham Jn	Croydon	Enfield	Hackney	Kensington	Kingston	Neasden	Oxford St	Richmond	Romford	Wembley	Wood Green
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Nothing	5	4	7	6	2	5	3	3	2	11	6	3	3	7	3
Under £1	0	2	1	0	0	1	2	1	0	2	0	0	1	1	0
£1 - £4.99	9	16	18	11	7	10	17	11	8	22	3	12	7	15	9
£5 - £9.99	8	20	16	15	7	12	15	15	12	21	7	15	6	15	13
£10 - £14.99	7	19	17	13	9	10	16	8	11	15	7	10	6	14	10
£15 - £19.99	7	10	10	8	7	10	7	8	8	9	5	12	7	7	12
£20 - £29.99	16	15	14	13	20	10	13	13	17	11	12	15	17	17	15
£30 - £49.99	15	6	10	13	16	18	10	12	14	3	15	13	20	10	17
£50 - £74.99	12	3	4	10	13	7	6	7	10	1	14	6	13	5	8
£75 - £99.99	3	1	1	3	3	5	2	8	4	0	10	3	6	1	2
£100 - £149.99	6	2	0	2	7	4	2	4	4	1	8	5	4	1	4
£150 - £199.99	3	0	0	1	2	2	0	2	3	0	2	0	2	1	2
£200+	2	0	1	1	3	2	0	4	3	1	4	2	2	1	1
<b>Mean</b>	<b>£44</b>	<b>£18</b>	<b>£19</b>	<b>£29</b>	<b>£46</b>	<b>£36</b>	<b>£23</b>	<b>£41</b>	<b>£43</b>	<b>£13</b>	<b>£54</b>	<b>£31</b>	<b>£45</b>	<b>£23</b>	<b>£33</b>
<b>Base</b>	<b>321</b>	<b>320</b>	<b>317</b>	<b>332</b>	<b>323</b>	<b>309</b>	<b>310</b>	<b>312</b>	<b>320</b>	<b>312</b>	<b>451</b>	<b>331</b>	<b>321</b>	<b>324</b>	<b>304</b>

**Planned spend on visit, average spend per visit and average monthly spend:**

	Bromley	Camberwell	Chingford	Clapham Jn	Croydon	Enfield	Hackney	Kensington	Kingston	Neasden	Oxford St	Richmond	Romford	Wembley	Wood Green
	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£
<b>Spend per visit</b>	<b>£44</b>	<b>£18</b>	<b>£19</b>	<b>£29</b>	<b>£46</b>	<b>£36</b>	<b>£23</b>	<b>£41</b>	<b>£43</b>	<b>£13</b>	<b>£54</b>	<b>£31</b>	<b>£45</b>	<b>£23</b>	<b>£33</b>
<b>Ave. per visit</b>	<b>£41</b>	<b>£20</b>	<b>£17</b>	<b>£30</b>	<b>£43</b>	<b>£34</b>	<b>£21</b>	<b>£41</b>	<b>£34</b>	<b>£13</b>	<b>£57</b>	<b>£28</b>	<b>£42</b>	<b>£20</b>	<b>£36</b>
<b>Ave. per month*</b>	<b>£302</b>	<b>£284</b>	<b>£221</b>	<b>£322</b>	<b>£330</b>	<b>£267</b>	<b>£302</b>	<b>£263</b>	<b>£195</b>	<b>£168</b>	<b>£235</b>	<b>£306</b>	<b>£300</b>	<b>£251</b>	<b>£410</b>
<b>Base</b>	<b>321</b>	<b>320</b>	<b>317</b>	<b>332</b>	<b>323</b>	<b>309</b>	<b>310</b>	<b>312</b>	<b>320</b>	<b>312</b>	<b>451</b>	<b>331</b>	<b>321</b>	<b>324</b>	<b>304</b>

\*Excludes those that did not give an expenditure or frequency visiting area

#### 4.4.5 What did different mode users spend?

Bus users spent £30 per visit, on average. Underground users and car users spent the most per visit (£46 and £42 respectively). Walkers and cyclists spent the least (£24 and £23 respectively). The average (planned) on the day of interview was consistent with this.

Bus users spent £265 per month, on average. This was higher than the average monthly spend of car users (£243), train users (£200) and Underground users (£202). Walkers spent more per month on average (£360).

#### Planned spend on visit, by mode used:

	Total	Bus	Walk	Car	Tube	Train	Bicycle
	%	%	%	%	%	%	%
Nothing	5	4	5	4	5	5	12
Under £1	1	1	1	1	0	0	3
£1 - £4.99	11	12	13	9	9	13	11
£5 - £9.99	13	13	15	10	11	13	14
£10 - £14.99	11	13	14	6	9	8	10
£15 - £19.99	8	9	9	7	5	7	10
£20 - £29.99	14	15	15	13	10	15	15
£30 - £49.99	13	12	12	17	14	12	12
£50 - £74.99	8	7	6	11	10	9	5
£75 - £99.99	4	3	2	4	9	5	3
£100 - £149.99	4	3	2	6	6	5	3
£150 - £199.99	1	1	1	3	2	1	0
£200+	2	1	1	3	3	1	2
<b>Mean</b>	<b>£34</b>	<b>£30</b>	<b>£25</b>	<b>£47</b>	<b>£46</b>	<b>£35</b>	<b>£26</b>
<b>Base</b>	<b>4907</b>	<b>1862</b>	<b>1229</b>	<b>854</b>	<b>480</b>	<b>322</b>	<b>105</b>

**Average spend per visit and average monthly spend\*, by mode:**

	<b>Total</b>	<b>Bus</b>	<b>Walk</b>	<b>Car</b>	<b>Tube</b>	<b>Train</b>	<b>Bicycle</b>
<b>Average spend per visit:</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Nothing	2	1	1	2	2	4	1
Under £1	0	0	0	0	0	1	1
£1 - £4.99	9	9	10	7	7	9	13
£5 - £9.99	13	12	18	8	10	14	14
£10 - £14.99	11	12	14	7	9	9	16
£15 - £19.99	10	11	13	9	6	5	10
£20 - £29.99	15	17	15	15	8	12	18
£30 - £49.99	13	12	11	17	13	11	13
£50 - £74.99	8	8	4	11	9	10	6
£75 - £99.99	4	3	2	6	8	6	2
£100 - £149.99	3	2	2	5	7	4	2
£150 - £199.99	1	0	0	1	2	1	0
£200+	1	1	1	2	1	1	0
<b>Mean</b>	<b>£32</b>	<b>£30</b>	<b>£24</b>	<b>£42</b>	<b>£46</b>	<b>£35</b>	<b>£23</b>
<b>Average monthly spend*</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Nothing	2	1	1	1	3	5	1
Under £1	0	1	0	0	0	0	0
£1 - £4.99	1	1	0	2	4	3	4
£5 - £9.99	2	2	0	4	3	3	1
£10 - £14.99	3	3	2	3	3	4	2
£15 - £19.99	1	2	0	1	1	1	1
£20 - £29.99	4	4	1	6	7	8	7
£30 - £49.99	7	7	3	9	13	11	5
£50 - £74.99	14	14	12	13	12	18	13
£75 - £99.99	2	2	0	4	6	4	2
£100 - £149.99	11	12	10	12	8	7	14
£150 - £199.99	13	12	16	10	14	13	16
£200+	39	38	52	35	26	24	34
<b>Mean</b>	<b>£276</b>	<b>£265</b>	<b>£360</b>	<b>£243</b>	<b>£202</b>	<b>£200</b>	<b>£258</b>
<b>Base</b>	<b>4381</b>	<b>1684</b>	<b>1130</b>	<b>753</b>	<b>390</b>	<b>278</b>	<b>98</b>

\*Excludes those that did not give an expenditure or frequency visiting area

## 4.5 How could town centres be improved?

Many town centre visitors mentioned improvements directly related to travel and transport. Having less traffic was mentioned by around one in three. Reducing pollution was mentioned by one in six. Better bus services and better car parking were each mentioned by one in seven. Improving the pedestrian environment and wanting the high street to be pedestrianised were each mentioned by one in ten.

### Suggested improvements to town centre (unprompted):

	All suggestions	Main suggestion
	%	%
<i>Any improvement(s) suggested</i>	81	-
Cleaner streets	31	9
Better range of shops	30	13
Less traffic	30	11
Improve shops	20	7
More leisure facilities	19	6
Remove undesirable element	19	9
More pleasant/greener environment	18	6
Reduce pollution	16	4
Longer shop opening hours	16	4
Better bus service	15	4
More easier parking	15	5
More shops	13	5
Improve pedestrian environment	11	3
High street should be pedestrianised	9	2
Improved cycle facilities	7	2
Improved priority for buses	6	1
Improve access to bus stop locations	4	<1

Base	4907	3971
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Other improvements to town centres were: cleaner streets (mentioned by one in three), improving the shops, having more leisure facilities, removing 'undesirables', having more public spaces and a more pleasant or a greener environment (each mentioned by one in five); longer shop opening hours (one in six) and having more shops (one in ten). One in six said that nothing could be improved.

Just over a quarter of visitors to Chingford said that the main improvement would be a better range of shops. A fifth of visitors to Mare Street Hackney mentioned this as the main improvement. Less traffic on the road was the main improvement mentioned by a fifth of visitors to Clapham Junction, Oxford Street and Wembley. (Also see Appendices 5.5.10 and 5.5.11 for suggested improvements to town centre, by town centre type and town centre).

## **4.6 What were attitudes to bus use, and how could bus use be increased?**

### **4.6.1 Overview**

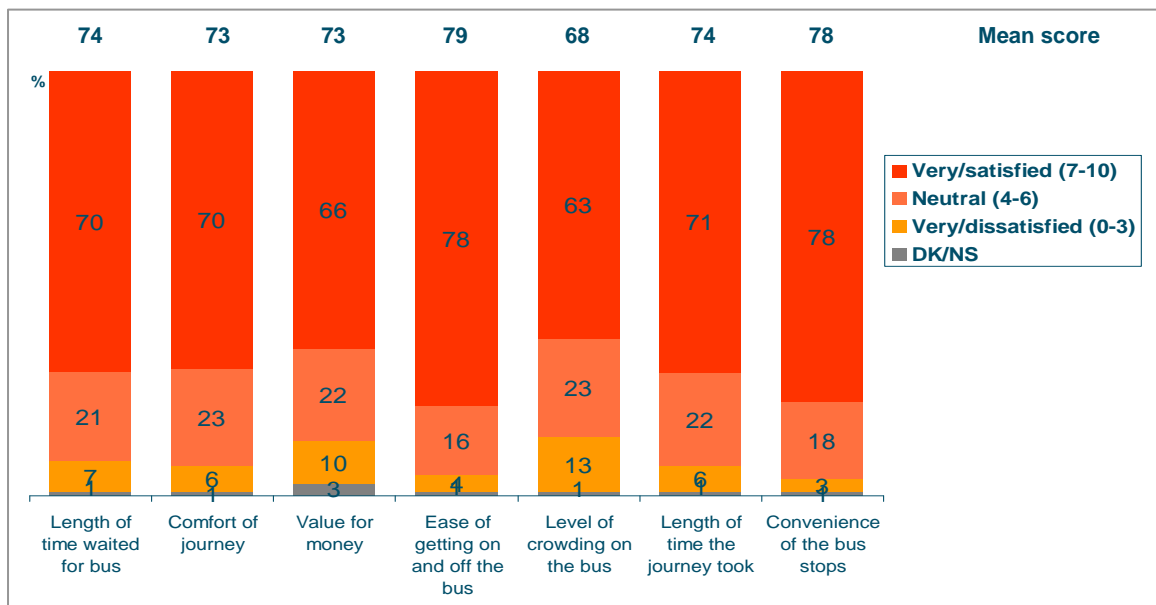
Four in ten said that there were no improvements that could be made to bus services that would encourage them to use buses (more). Making buses more regular, reliable, faster and direct were most mentioned as improvements that would encourage bus use.

Most town centre visitors (around seven in ten) agreed that bus stops are conveniently located, that goods vehicles should not be allowed in bus lanes, and that there should be stricter enforcement of illegal parking in bus lanes. Fewer (one third or less) agreed that taxis should not be allowed in bus lanes, and that bus lanes are a nuisance to all other road users.

#### 4.6.2 Were bus users satisfied?

Bus users were satisfied with their bus travel to the town centre. At least two thirds of bus users were satisfied with each aspect of their bus travel. Bus users were most satisfied with the ease of getting on and off the bus and the convenience of the bus stops. Bus users were least satisfied – but still generally satisfied – with the level of crowding on the bus. Older bus users (age 65+) were more satisfied with their bus travel than younger bus users.

#### Satisfaction with bus travel, by type of town centre:



Base: All who travelled by bus to the centre (1862)

Bus users to Bromley were generally most satisfied with their bus travel. Bus users to Chingford and Kingston were more satisfied with a number of aspects of bus travel than visitors to any other town centre.

Bus users to Wembley were least satisfied with their bus travel, particularly with the level of crowding and duration of journey. Bus users to Oxford Street gave low satisfaction for level of crowding and duration of journey.



### Average satisfaction score for bus travel, by type of town centre:

	All bus users	Central London	Main suburban	Other suburban
	%	%	%	%
Length of time waited for the bus	74	77	74	73
Comfort of journey	73	76	72	74
Value for money	73	71	75	70
Ease of getting on/off	79	77	80	77
Level of crowding	68	66	69	69
Length of time journey took	74	69	75	74
Convenience of stops	78	77	78	79
<b>Base: All who travelled by bus</b>	<b>1862</b>	<b>201</b>	<b>1043</b>	<b>618</b>

Mean scores calculated on a scale where 0 = Extremely dissatisfied and 10 = Extremely satisfied, excluding "Don't know".

### 4.6.3 How could bus usage be encouraged?

Three fifths (58%) mentioned some improvements that could encourage (greater) bus use to the town centre. Making buses more regular (23%), more reliable (21%), faster (21%), and making direct bus routes (17%) and lower fares (15%) were the most frequently suggested ways in which bus use could be encouraged.

**Suggested ways to increase bus usage (prompted):**

	<b>All suggestions</b>	<b>Main suggestion</b>
	<b>%</b>	<b>%</b>
<i>Any improvement(s) suggested</i>	58	-
More regular / frequent buses	23	17
More reliable buses	21	12
Faster journey	21	14
Direct bus routes	17	11
Lower fares	15	14
Safer buses	9	4
More seats on / less crowded buses	9	4
More comfortable journey	8	2
Cleaner buses	8	1
Reduce number of cars on road	7	3
Make children behave / school buses	6	3
Bus stop nearer home / destination	5	2
More seating at bus stops	5	1
More shelters at bus stops	5	1
Greater priority given to buses	4	1
More information about buses	4	2
Improved ease of getting on / off buses	3	1
Greener buses	3	1
<b>Base</b>	<b>4907</b>	<b>2966</b>

Visitors to central London centres were more likely to say that faster journeys would encourage greater bus use. They were least likely to say lower fares would encourage greater bus usage.

**Suggested ways to increase bus usage (prompted), by type of town centre:**

	<b>Total</b>	<b>Central London</b>	<b>Main suburban</b>	<b>Other suburban</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
<i>Any improvement(s) suggested</i>	58	61	57	61
More regular / frequent buses	23	25	23	22
More reliable buses	21	27	19	22
Faster journey	21	33	17	21
Direct bus routes	17	27	15	16
Lower fares	15	13	15	17
Safer buses	9	11	7	10
More seats on / less crowded buses	9	9	9	9
More comfortable journey	8	12	7	9
Cleaner buses	8	11	7	7
Reduce number of cars on road	7	9	6	8
Make children behave / school buses	6	3	6	8
Bus stop nearer home / destination	5	6	4	6
More seating at bus stops	5	6	4	5
More shelters at bus stops	5	6	4	4
Greater priority given to buses	4	6	3	4
More information about buses	4	9	4	3
Improved ease of getting on / off buses	3	3	2	4
Greener buses	3	4	3	3
<b>Base</b>	<b>4907</b>	<b>763</b>	<b>2561</b>	<b>1583</b>

At least half of town centre visitors had suggestions for encouraging bus use, irrespective of what mode they used to travel to the town centre. The most suggested improvements were generally consistent across mode used. Notable differences were: Underground users most likely to suggest faster journeys (37%) and direct routes (29%). Direct routes was the most suggested improvement by train users (25%). Cyclists were most likely to suggest lower fares (26%)

**Suggested ways to increase bus usage (prompted), by mode used:**

	<b>Bus</b>	<b>Car</b>	<b>Walk</b>	<b>Tube</b>	<b>Train</b>	<b>Bicycle</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
<i>Any improvement(s) suggested</i>	62	57	51	59	58	63
More regular / frequent buses	28	18	20	20	21	20
More reliable buses	28	16	15	25	20	17
Faster journey	23	18	12	37	20	14
Direct bus routes	19	12	12	29	25	15
Lower fares	17	17	13	9	9	26
Safer buses	11	9	5	6	8	3
More seats on / less crowded buses	12	8	6	7	7	6
More comfortable journey	10	7	5	9	10	7
Cleaner buses	11	6	4	8	5	4
Reduce number of cars on road	8	8	3	10	4	10
Make children behave / school buses	8	7	4	2	3	2
Bus stop nearer home / destination	6	4	3	5	4	4
More seating at bus stops	6	3	2	5	6	4
More shelters at bus stops	7	3	3	5	3	1
Greater priority given to buses	5	3	1	5	3	1
More information about buses	5	3	3	7	6	2
Improved ease of getting on / off buses	4	3	2	3	1	1
Greener buses	4	3	1	2	2	3
<b>Base</b>	<b>1862</b>	<b>1229</b>	<b>854</b>	<b>480</b>	<b>322</b>	<b>105</b>

Only two fifths (38%) of those that never used the bus to travel to the town centre gave suggested improvements that would encourage them to use buses. The most mentioned changes were direct routes (17%), faster journey (11%) and more regular / frequent buses (10%)

**Suggested ways to increase bus usage (prompted), by bus usage:**

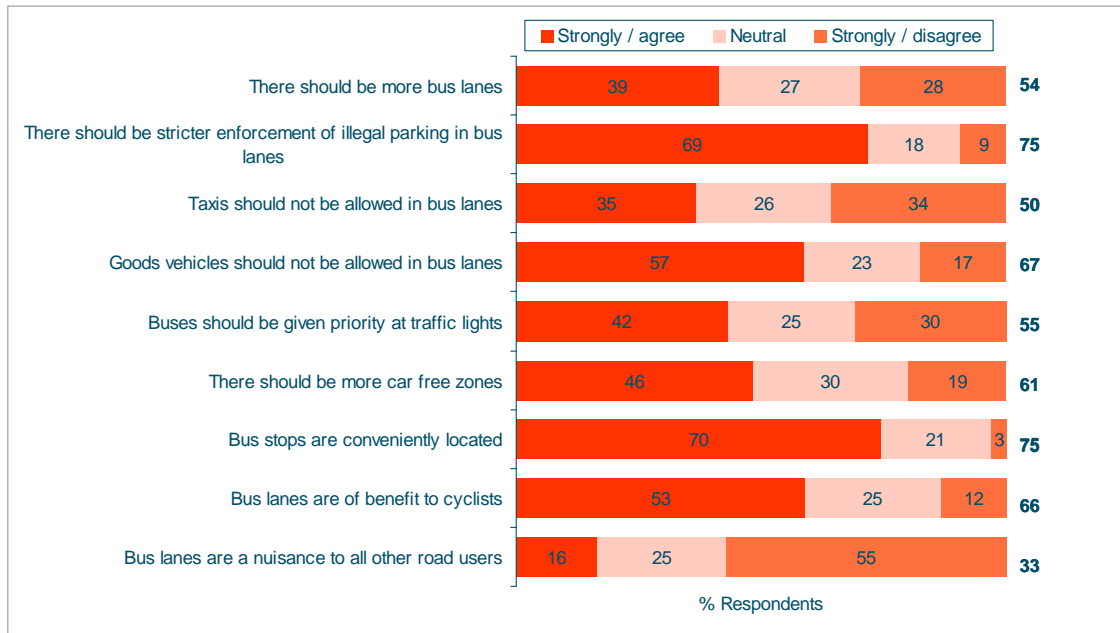
	Total	Used bus on visit	Ever use buses	Never use buses
	%	%	%	%
<i>Any improvement(s) suggested</i>	58	62	67	38
More regular / frequent buses	23	28	25	10
More reliable buses	21	28	22	9
Faster journey	21	23	23	11
Direct bus routes	17	19	17	15
Lower fares	15	17	17	8
Safer buses	9	11	9	4
More seats on / less crowded buses	9	12	9	4
More comfortable journey	8	10	9	4
Cleaner buses	8	11	7	3
Reduce number of cars on road	7	8	8	3
Make children behave / school buses	6	8	6	3
Bus stop nearer home / destination	5	6	5	3
More seating at bus stops	5	6	4	2
More shelters at bus stops	5	7	4	1
Greater priority given to buses	4	5	4	1
More information about buses	4	5	4	3
Improved ease of getting on / off buses	3	4	3	1
Greener buses	3	4	2	2
<b>Base</b>	<b>4907</b>	<b>1862</b>	<b>1916</b>	<b>1058</b>

#### 4.6.4 What were visitors' attitudes to bus services?

Most visitors were positive towards provision for bus services to town centres. Around seven out of ten visitors agreed that bus stops are conveniently located, that goods vehicles should not be allowed in bus lanes and that there should be stricter enforcement of illegal parking in bus lanes. Only one in six agreed that bus lanes are a nuisance to all other road users. Understandably, bus users were more likely to be positive towards provision for bus services than other mode users.

Overall, visitors to other suburban town centres were more likely to be positive towards the measures and priorities, with the exceptions of agreeing there should be more bus lanes, and that bus stops are conveniently located.

#### Agreement with bus service provision:



Base: Total sample (4907)

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

- **There should be stricter enforcement of illegal parking in bus lanes:**  
Fewer visitors to central London centres agreed (60% did);  
Visitors to Camberwell (83%) and Bromley (80%) were most likely to agree.
- **Goods vehicles should not be allowed in bus lanes:**  
Higher agreement amongst visitors to main and other suburban centres;  
Visitors to Enfield (67%) and Kingston (65%) were more likely to agree.
- **Bus lanes are of benefit to cyclists:**  
Cyclists were more likely to agree (73% did);  
Visitors to Mare Street Hackney were more likely to agree (70% did).
- **There should be more car free zones:**  
Car users were less likely to agree (38% did) (around half of bus users, Underground users, train users, walkers and cyclists agreed);  
Visitors to Camberwell (57%) and Mare Street Hackney (56%) were more likely to agree;  
Visitors to Clapham Junction (33%) and Chingford (36%) were least likely to agree.
- **Buses should be given priority at traffic lights:**  
Visitors to other suburban town centres (51%) were more likely to agree;  
Visitors to Mare Street Hackney (62%) and Wembley (57%) were more likely to agree.
- **There should be more bus lanes:**  
Visitors to Central London (49%) were more likely to agree;  
Visitors to Oxford Street (52%), Wembley (51%) and Clapham junction (50%) were more likely to agree;  
Visitors to Bromley (29%) and Richmond (27%) were least likely to agree.
- **Taxis should not be allowed in bus lanes:**  
Visitors to Wembley (50%) and Kensington High Street (44%) were more likely to agree;  
Visitors to Bromley (29%) and Croydon (25%) were least likely to agree.

- **Bus lanes are a nuisance to all other road users other main:**

Cyclists and taxi / minicab users were more likely to disagree

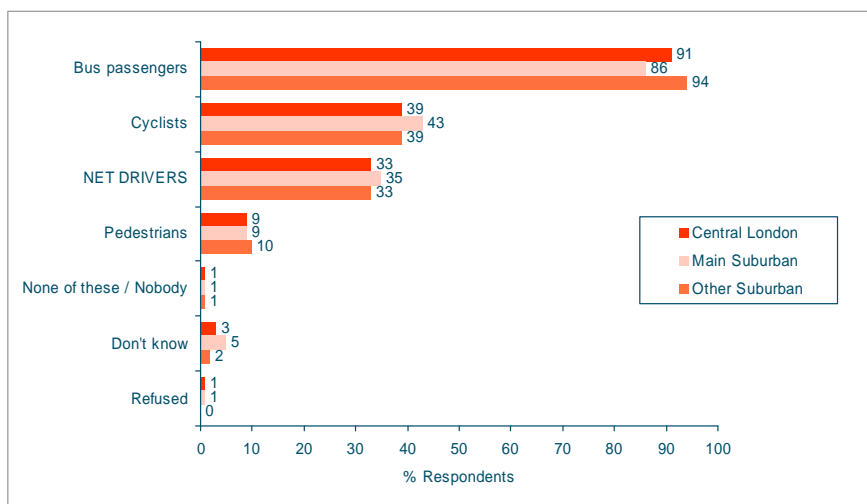
Visitors to central London (10%) were less likely to agree.

#### 4.6.5 Who benefits from bus lanes?

Almost all (91%) of town centre visitors felt that bus users benefit from bus lanes. Four out of ten (39%) felt that cyclists benefitted. A third felt that drivers (particularly taxi drivers) benefitted. Fewer than one in ten (9%) said that pedestrians would benefit from bus lanes.

Visitors to main suburban centres were more likely to say that bus passengers benefit from bus lanes.

#### Who benefits from bus lanes (prompted), by type of town centre:



Base: Central London (763), Main suburban centres (2561), other suburban centres (1583)



Four fifths of cyclists (81%) felt that cyclists benefitted from bus lanes. Car users were slightly more likely to feel that bus lanes benefitted car drivers.

## 4.7 How could cycling be increased?

One third of town centre visitors mentioned at least one thing that might encourage them to cycle to the town centre. The main improvements were more cycle lanes (17%), more cycle paths (15%) and less road traffic (17%).

Cyclists were much more likely to mention something. They too particularly mentioned more cycle lanes (65%) and / or cycle paths (62%) and less road traffic (43%). Half (50%) also mentioned better cycle parking (50% and less road traffic (43%) were also mentioned by cyclists.

### Suggested ways to increase cycling (prompted), by mode used:

	Total	Bus	Walk	Car	Tube	Train	Bicycle
	%	%	%	%	%	%	%
<i>Anything</i>	34	31	40	28	33	29	86
(More) cycle lanes	17	16	21	12	15	13	65
Less road traffic	17	16	20	10	21	15	43
(More) dedicated cycle paths	15	12	20	12	10	12	62
(Better) parking in this area	8	6	10	9	4	7	50
Bicycle hire scheme	7	7	8	4	7	5	16
Free on-road cycle training	4	4	5	2	3	3	14
(Better) parking at / near home	3	3	4	3	2	2	16
None of these / Nothing	63	66	57	69	62	69	13
Don't know	3	3	3	3	5	2	1
<b>Base</b>	<b>4907</b>	<b>1862</b>	<b>1229</b>	<b>854</b>	<b>480</b>	<b>322</b>	<b>105</b>

(Also see Appendices 5.5.12 and 5.5.13 for suggested ways to increase cycling by type of town centre, and by town centre.)

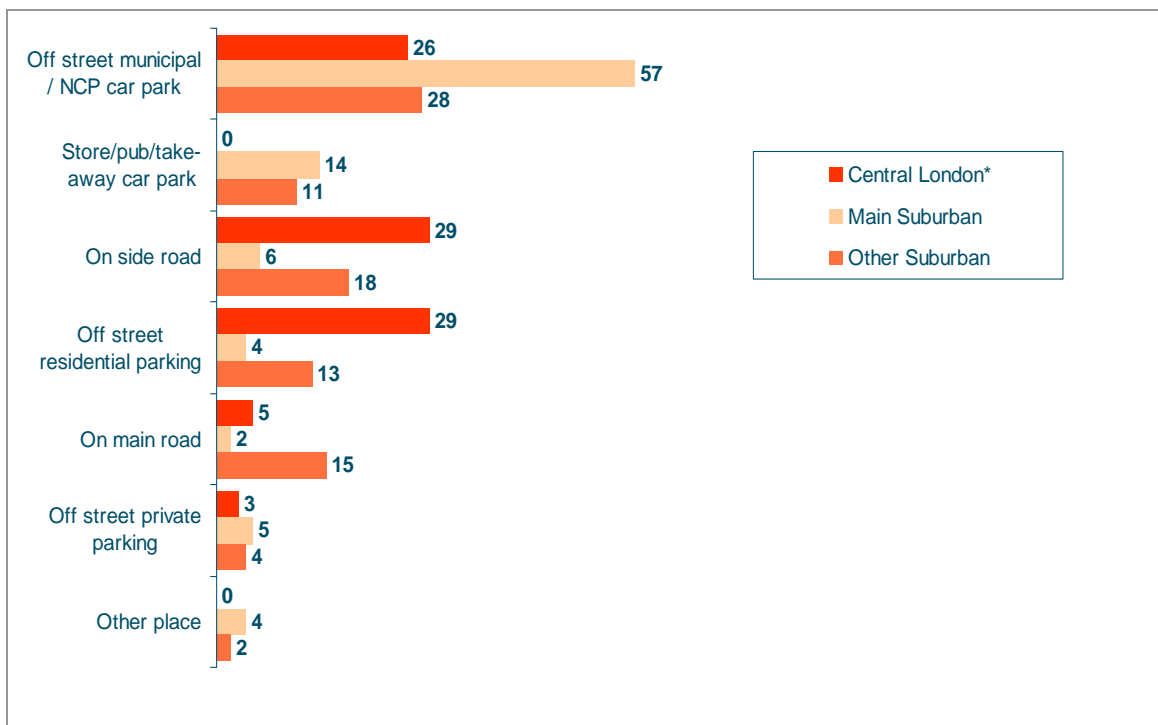
## 4.8 Were car users satisfied with parking?

### 4.8.1 Where did car users park?

Half (48%) of car users parked in an off street municipal or an NCP car park. One in eight (13%). One in ten parked in a side road (10%). Under one in ten parked off street (7%), on a main road (6%) or off street in a private parking space (5%).

Car users to main suburban town centres were significantly more likely to park in an off street municipal or NCP car park. Visitors to other suburban centres were more likely to park on a main road, side road or off street.

#### Where parked car, by type of town centre:



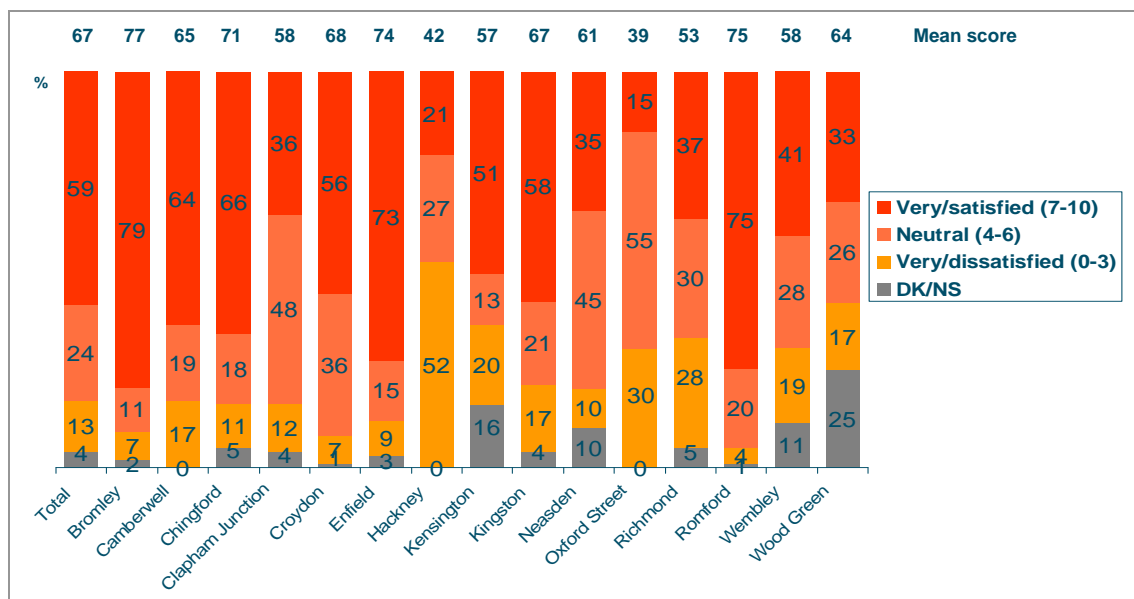
Base: Those that drove to Central London (21\*), Main Suburban (590), Other Suburban (243)

Car users to Enfield and Romford were most likely to have used a municipal / NCP car park (68% and 67% respectively did). Car users to Neasden were just as likely to park on the main road as they were to park in an off street car park. Car users to Mare Street Hackney more likely to park in a store / pub / take-away car park or on a side road than in an off street car park.

#### 4.8.2 Were car users satisfied with the parking?

A majority of car drivers were satisfied with the ease of access to town centre by car. Car drivers to main suburban centres were most satisfied with the ease of access to their area by car. Car users to Bromley and Romford were more satisfied with this.

**Satisfaction with ease of access to town centre by car, by town centre:**

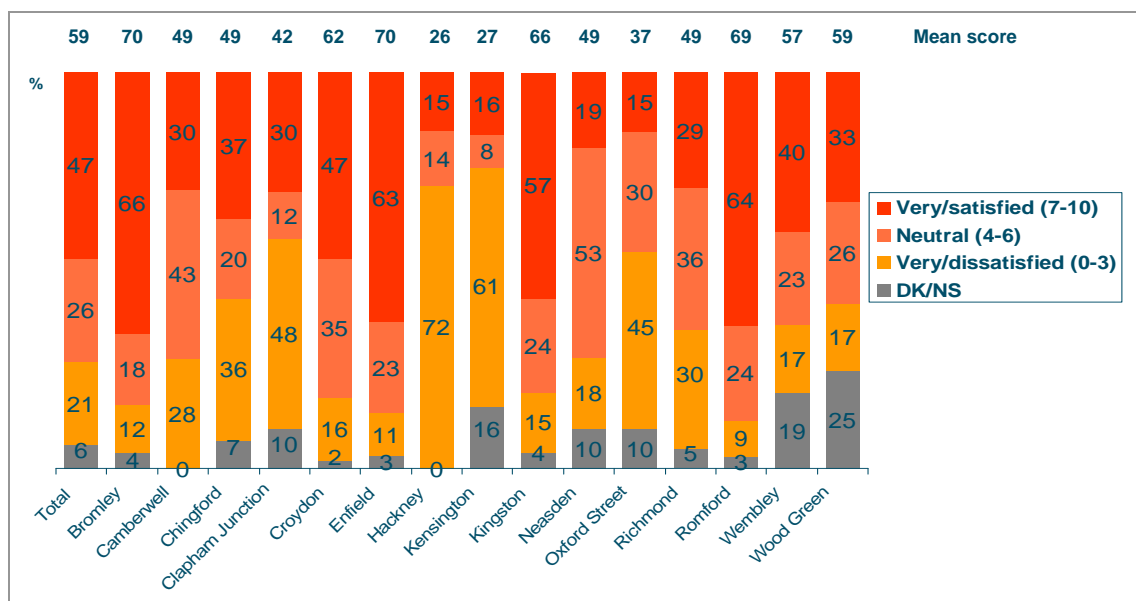


Base: Those that drove (854)

Note: Some base sizes within each town centre are low

Car drivers were only averagely satisfied with the number of parking spaces. Car drivers to Mare Street Hackney were least satisfied with this. Car drivers to Bromley and Enfield were most satisfied with this.

**Satisfaction with number of parking spaces provided, by town centre:**



Base: Those that drove (854)

Note: Some base sizes within each town centre are rather low

**4.9 Were visitors to Oxford Street affected by the changes to travel at Tottenham Court Road?**

**4.9.1 Awareness of changes to travel around Tottenham Court road**

Just under two tenths (18%) of visitors to Oxford Street were aware of the changes to travel around Tottenham Court Road.

**4.9.2 Awareness for reasons for diversions and travel changes**

The majority of visitors to Oxford Street (86%) were not aware of the reasons for the changes to travel around Tottenham Court Road. Reasons that were mentioned included building works (4%), building rail / Crossrail (3%), transport works (2%).

### **4.8.3 Impact of travel changes on travel**

Only one in twenty (5%) of visitors to Oxford Street said they were affected by the travel changes around Tottenham Court Road. Of the minority (22 people) that were affected, half changed their driving route, one sixth changed their usual bus journey, and one in twenty avoided cycling.

## 5. Appendices

### 5.1 Questionnaire

#### INTRODUCTION

**SAY** Good morning / afternoon / evening. I am from Synovate, an independent market research organisation. We are conducting a survey on behalf of Transport for London on travel to this area and use of the town centre. Could you spare some time to answer some questions please? It will take about 12 minutes. Any answer you give will be treated in confidence in accordance with the Code of Conduct of the Market Research Society.

#### ASK ALL

Q1 Can I just check – do you or does anyone else in your household work in any of these organisations?

#### SHOW CARD Q1

#### CODE ALL MENTIONED

Advertising	1	<b>CLOSE IF ANY OF THESE CODED</b>
Journalism	2	
London Underground / London Transport / TfL	3	
Bus operating company	4	<b>ASK Q2</b>
Market research	5	
None of these	0	

#### ASK ALL

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?

#### SINGLE CODE ONLY

Yes, have / will be using shops / facilities	1	<b>ASK Q3</b>
No, just passing through	2	<b>CONTINUE FOR OXFORD STREET THANK &amp; CLOSE FOR ALL OTHER LOCATIONS</b>

#### ASK ALL

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?

#### SHOW CARD Q3/4

#### CODE ALL MENTIONED IN FIRST COLUMN BELOW

#### ASK IF GIVE MORE THAN ONE ANSWER AT Q3

Q4 And what is your ONE main reason for visiting this area on this occasion today?

**SHOW CARD Q3/4 AGAIN**  
**SINGLE CODE ONLY IN SECOND COLUMN BELOW**

	Q3 All reasons MULTI-CODE	Q4 Main reason SINGLE CODE	
Shopping	1	1	<b>AT LEAST ONE OF THESE MUST BE CODED AT Q3</b>
Using service e.g. bank, post office, hairdresser, travel agent	2	2	
Using public amenity, e.g. court, police station, library hospital	3	3	
Eating / drinking out	4	4	
Other social / leisure	5	5	
Buying petrol	6	6	
Delivering goods	7	7	
Window shopping	8	8	
Personal business, e.g. job interview, church	9	9	
General recreation	0	0	
Live here	X	X	<b>OXFORD St. ONLY</b>
Work here	V	X	
Travelling through the area	A <sub>(1)</sub>	A <sub>(1)</sub>	
Visiting friends and relatives	B <sub>(2)</sub>	B <sub>(2)</sub>	
Dropping off / picking up friend or relative (incl. school)	C <sub>(3)</sub>	C <sub>(3)</sub>	
Other (PLEASE CODE AND WRITE IN)	D <sub>(1)</sub>	D <sub>(1)</sub>	

**CHECK SCREENING CRITERIA!**

**FOR ALL TOWN CENTRES EXCEPT OXFORD STREET:**

**- MUST ANSWER AT LEAST ONE OF CODES 1, 2, 3, 4, 5, 6, 7, 8, 9, 0 AT Q3**

**FOR OXFORD STREET ONLY:**

**- MUST ANSWER AT LEAST ONE OF CODES 1, 2, 3, 4, 5, 6, 7, 8, 9, 0, X, V AT Q3**

**DETAILS OF VISITING AREA**

**ASK ALL**  
**SHOW MAP**

Q5 How often do you visit the area shown on this map?

**SINGLE CODE ONLY**

5 or more days a week	1
3 or 4 days a week	2
2 days a week	3
Once a week	4
Once a fortnight	5

About once a month	6
Less than once a month	7
First time	8
(Don't know)	X

**ASK ALL**

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

**SINGLE CODE ONLY**

Live within ten minutes walk	1
Work within ten minutes walk	2
Both	3
No, neither	4
(Don't know)	X

**MODE OF TRANSPORT**

**ASK ALL**

Q7 How did you travel to this area today?

**SHOW CARD Q7**

**PROBE FOR MAIN METHOD**

**SINGLE CODE ONLY**

Drove a car / van / lorry	1	<b>DRIVER / CAR USER</b>
Drove a motorbike / moped / scooter	2	
Drove a delivery vehicle	3	
Given a lift	4	
Bus	5	<b>BUS USER</b>
Tube / Underground	6	
Train	7	
Bicycle	8	
Walked	9	
Taxi / minicab	0	
Other (PLEASE CODE AND WRITE IN)	1	
(Don't know)	X	

**ASK ALL**

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

**SINGLE CODE ONLY**

5 or more days a week	1
3 or 4 days a week	2
2 days a week	3
Once a week	4
Once a fortnight	5



About once a month	6
Less than once a month	7
First time	8
(Don't know)	X

**ASK ALL**

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

**SHOW CARD Q9**

**MULTICODES POSSIBLE**

Car / van / lorry	1
Motorbike / moped / scooter	2
Bus	3
Tube / Underground	4
Train	5
Bicycle	6
Walk (all the way)	7
Taxi / minicab	8
Other	9
(Don't know)	X

**ASK IF USED BUS TO TRAVEL TODAY (CODE 5 @ Q7)**

**OTHERS GO TO Q11**

Q10 How would you rate the following aspects of your journey by bus today?

**SHOW CARD Q10**

**TICK START AND ROTATE ORDER OF ASKING**

**SINGLE CODE ONLY FOR EACH**

		Extremely satisfied				to		Extremely dissatisfied				DK	
		0	1	2	3	4	5	6	7	8	9	10	DK
a	Length of time waited for the bus	0	1	2	3	4	5	6	7	8	9	X	V
b	Comfort of journey	0	1	2	3	4	5	6	7	8	9	X	V
c	Value for money	0	1	2	3	4	5	6	7	8	9	X	V
d	Ease of getting on and off the bus	0	1	2	3	4	5	6	7	8	9	X	V
e	Level of crowding on the bus	0	1	2	3	4	5	6	7	8	9	X	V
f	Length of time the journey took	0	1	2	3	4	5	6	7	8	9	X	V
g	Convenience of the bus stops	0	1	2	3	4	5	6	7	8	9	X	V

**ASK ALL**

Q11 Which of the reasons on this card describe why you decided to use [MODE OF TRANSPORT AT Q7] rather than any other method of transport?

**SHOW CARD Q11/12**

**CODE ALL MENTIONED IN FIRST COLUMN BELOW**

**ASK IF GIVE MORE THAN ONE ANSWER AT Q11**

Q12 And which ONE reason best describes why you decided to use that method?

**SHOW CARD Q11/12 AGAIN**  
**SINGLE CODE ONLY IN SECOND COLUMN BELOW**

	<b>Q11</b> <b>All reasons</b> <b>MULTICODES</b> <b>POSSIBLE</b>	<b>Q12</b> <b>Main reason</b> <b>SINGLE CODE ONLY</b>
Cheaper / less expensive	1	1
Quicker	2	2
More direct	3	3
Had heavy bags / shopping to carry	4	4
Travelling with children	5	5
More relaxing / comfortable	6	6
Easier / more convenient	7	7
Safer	8	8
Avoids parking difficulties	9	9
Going to more than one place	0	0
Only method possible	1	1
Live very close by	2	2
Need / enjoy exercise / healthy	3	3
No car / can't drive	4	4
Weather issues	5	5
Avoid the congestion charge	6	6
Other (PLEASE CODE AND WRITE IN)	1	1
(Don't know)	X	X

**ASK ALL**

Q13 How frequently do you travel by bus in this area?

**SINGLE CODE ONLY**

**ASK ALL**

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

**SINGLE CODE ONLY**

	<b>Q13</b> <b>Nowadays</b>	<b>Q14</b> <b>12 months ago</b>
5 or more days a week	1	1
3 or 4 days a week	2	2
2 days a week	3	3
Once a week	4	4
Once a fortnight	5	5
About once a month	6	6
Less than once a month	7	7
First time	8	8
Never	0	0
(Don't know)	X	X

**ASK ALL**

Q15 Which of the things shown on this card would encourage you to use buses more often in this area?

**SHOW CARD Q15/16**

**CODE ALL MENTIONED IN FIRST COLUMN BELOW**

**ASK IF GIVE MORE THAN ONE ANSWER AT Q15**

Q16 And which ONE change would be most likely to encourage you to use buses more?

**SHOW CARD Q15/16 AGAIN**

**SINGLE CODE ONLY IN SECOND COLUMN BELOW**

	<b>Q15 All reasons MULTICODES POSSIBLE</b>	<b>Q16 Main reason SINGLE CODE ONLY</b>
Nothing	1	
More regular / frequent buses	2	2
More reliable buses	3	3
Faster journey	4	4
Direct bus routes	5	5
Greater priority given to buses	6	6
Reduce number of cars on road / less congestion	7	7
Stricter enforcement of illegal parking in bus lanes	8	8
More seats on buses / less crowded buses	9	9
More comfortable journey	0	0
More shelters at bus stops	1	1
More seating at bus stops	2	2
Bus stop nearer home / destination	3	3
Improved ease of getting on and off buses	4	4
More information about buses	5	5
Safer buses	6	6
Make children behave / school buses	7	7
Cleaner buses	8	8
Greener buses	9	9
Lower fares	0	0
Other (PLEASE CODE AND WRITE IN)	1	1
(Don't know)	X	X

**ASK ALL**

Q17 How strongly do you agree or disagree with each of the following statements about this area?

**SHOW CARD Q17**

**TICK START AND ROTATE ORDER OF ASKING**

**SINGLE CODE ONLY FOR EACH**

Disagree strongly						to	Agree strongly				
0	1	2	3	4	5	6	7	8	9	10	DK

a	There should be more bus lanes	0	1	2	3	4	5	6	7	8	9	X	V
b	There should be stricter enforcement of illegal parking in bus lanes	0	1	2	3	4	5	6	7	8	9	X	V
c	Taxis should not be allowed in bus lanes	0	1	2	3	4	5	6	7	8	9	X	V
d	Goods vehicles should not be allowed in bus lanes	0	1	2	3	4	5	6	7	8	9	X	V
e	Buses should be given priority at traffic lights	0	1	2	3	4	5	6	7	8	9	X	V
f	There should be more car free zones	0	1	2	3	4	5	6	7	8	9	X	V
g	Bus stops are conveniently located	0	1	2	3	4	5	6	7	8	9	X	V
h	Bus lanes are of benefit to cyclists	0	1	2	3	4	5	6	7	8	9	X	V
i	Bus lanes are a nuisance to all other road users	0	1	2	3	4	5	6	7	8	9	X	V

**ASK ALL**

Q18 Who – if anyone – do you believe benefits from bus lanes?

**SHOW CARD Q18**

**MULTICODES POSSIBLE**

Bus passengers	1
Car / van drivers	2
Taxi / minicab drivers	3
Motorcycle / moped / scooter drivers	4
Cyclists	5
Pedestrians	6
None of these / Nobody	0
(Don't know)	X
(Refused)	V

**ASK ALL**

Q19 Which of the things shown on this card would encourage you to cycle more often in this area?

**SHOW CARD Q19**

**MULTICODES POSSIBLE**

(More) cycle lanes on the roads	1
(More) dedicated cycle paths	2
Less road traffic	3
Free on-road cycle training	4
Bicycle hire scheme	5
(Better) bicycle parking facilities in this area	6
(Better) bicycle parking facilities at / near your home	7
None of these / Nothing	0
(Don't know)	X
(Refused)	V

**ASK IF DROVE / WERE GIVEN A LIFT DRIVEN (CODES 1-4 @ Q7)**

**OTHERS GO TO Q23**

**SHOW MAP**

Q20 Did you park your vehicle in the area shown on this map or outside the area shown on this map?  
**SINGLE CODE ONLY**

On map	1
Off map	2
(Don't know)	X

**ASK IF DROVE / WERE GIVEN A LIFT DRIVEN (CODES 1-4 @ Q7)  
 OTHERS GO TO Q23**

Q21 Where did you park your vehicle? Was it...

**SHOW CARD Q21  
 PROBE FOR TYPE OF PARKING FACILITY USED  
 SINGLE CODE ONLY**

Off street residential parking	1
Off street private parking (e.g. driveway)	2
Off street municipal / NCP car park	3
In store / pub / take-away car park	4
On main road	5
On side road	6
In filling station forecourt	7
Other place	0
(Don't know)	X

**ASK IF DROVE / WERE GIVEN A LIFT (CODES 1-4 @ Q7)  
 OTHERS GO TO Q23**

Q22 How satisfied are you with each of the following...

**SHOW CARD Q22  
 TICK START AND ROTATE ORDER OF ASKING  
 SINGLE CODE ONLY FOR EACH**

		Extremely satisfied			to				Extremely dissatisfied			DK	
		0	1	2	3	4	5	6	7	8	9	10	DK
a	The number of parking spaces provided in this area	0	1	2	3	4	5	6	7	8	9	X	V
b	The ease of access to this area by car	0	1	2	3	4	5	6	7	8	9	X	V

**SHOPPING & EXPENDITURE IN THE AREA**
**ASK ALL**

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?

**SHOW CARD Q23  
 CODE ALL MENTIONED**

Food / groceries	1
Take-away food	2
Wine, beer, spirits	3
Clothing or footwear	4
Confectionery, tobacco, newspapers	5
Stationery / books / CDs / DVDs / leisure goods	6
Pharmaceuticals / toiletries	7
Luxury goods	8
Major household goods	9
Other household goods, e.g. electrical goods	0
Travel Pass / mobile top up / phonecard	1
Services, e.g. hairdresser, dry cleaner, Post Office, travel agent	2
Eating in a café or restaurant	3
Having a drink in a pub or wine bar	4
Going to cinema, theatre, concert, leisure facility, etc.	5
Other (PLEASE CODE AND WRITE IN)	1
(Don't know)	X

**ASK ALL**

Q24 How much will you have spent in this area today?

**SHOW CARD Q24/25**

**SINGLE CODE ONLY IN FIRST COLUMN BELOW**

**ASK ALL**

Q25 How much do you typically spend on average per visit to this area?

**SHOW CARD Q24/25 AGAIN**

**SINGLE CODE ONLY IN SECOND COLUMN BELOW**

	Q24 Spent today	Q25 Usually spend
Nothing	1	1
Under £1	2	2
£1 - £4.99	3	3
£5 - £9.99	4	4
£10 - £14.99	5	5
£15 - £19.99	6	6
£20 - £29.99	7	7
£30 - £49.99	8	8
£50 - £74.99	9	9
£75 - £99.99	0	0
£100 - £149.99	1	1
£150 - £199.99	2	2
£200+	3	3
(Don't know)	X	X
(Refused)	V	V

**ASK ALL**

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

**SINGLE CODE ONLY**

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

**ASK ALL****SHOW MAP**

Q27 In what ways do you think this area could be improved?

**CODE ALL MENTIONED IN FIRST COLUMN BELOW****ASK ALL**

Q28 Which of these would be the top three in order of importance?

**PROBE FOR MOST IMPORTANT – SINGLE CODE IN SECOND COLUMN BELOW****PROBE FOR SECOND MOST IMPORTANT – SINGLE CODE IN THIRD COLUMN BELOW****PROBE FOR THIRD MOST IMPORTANT – SINGLE CODE IN FOURTH COLUMN BELOW**

	Q27 Any ways can improve MULTICODES POSSIBLE	Most important SINGLE CODE	Q28 2 <sup>nd</sup> most important SINGLE CODE	3 <sup>rd</sup> most important SINGLE CODE
More shops	1	1	1	1
Better range of shops	2	2	2	2
Improve shops / better quality shops	3	3	3	3
Longer shop opening hours	4	4	4	4
More leisure facilities, e.g. restaurants, bars, cinemas, etc.	5	5	5	5
More pleasant / greener environment	6	6	6	6
Cleaner streets	7	7	7	7
Reduce pollution	8	8	8	8
More public spaces	9	9	9	9
Remove undesirable element / more policing	0	0	0	0
Less traffic	1	1	1	1
High street should be pedestrianised	2	2	2	2
Improve pedestrian environment	3	3	3	3
More / easier parking	4	4	4	4
Better bus service	5	5	5	5
Improved priority for buses	6	6	6	6
Improve access to bus stop locations	7	7	7	7
Improved cycle facilities	8	8	8	8

	(1)	(32)	(35)	(38)
Other (PLEASE CODE AND WRITE IN)	1	1	1	1
Nothing	0	0	0	0
(Don't know)	X	X	X	X

### OXFORD STREET SPECIFIC QUESTIONS

#### ASK ALL AT OXFORD STREET

OX1 Why are you visiting this area – the Oxford Street area - today, rather than going somewhere else?

**DO NOT PROMPT**

**MULTICODES POSSIBLE**

Oxford Street is best shopping area	1
Visiting a particular shop	2
More / better / bigger range of shops	3
Longer shop opening hours	4
Visiting a particular leisure facility	5
More leisure facilities, e.g. restaurants, bars, cinemas, etc.	6
Visiting other places in London as well	7
As a 'day out' / trip 'into town'	8
To do something different / special	9
Had to / have to be in central London for other reason	0
Meeting people here	1
Good public transport	2
Easy for me to travel to / travel home from	3
Easy for other people to travel to / travel home from	4
Live near here	5
Work near here	6
Other (PLEASE CODE AND WRITE IN)	1
No particular reason	0
(Don't know)	X

#### ASK ALL AT OXFORD STREET

OX2 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?

**SINGLE CODE ONLY**

Yes	1
No	2
(Don't know)	X

#### ASK ALL AT OXFORD STREET

OX3 Do you know the reasons for these diversions and travel changes around Tottenham Court Road?

**DO NOT PROMPT**

**MULTICODES POSSIBLE**



Building works (unspecified)	1
Utility works (e.g. electricity, water, gas)	2
Transport works (unspecified)	3
Improving Underground station	4
Building rail / Crossrail station	5
Improving bus facilities / bus routes	6
Improving road layout / better roads	7
Improving cycling facilities	8
Improving pavements / pedestrian facilities	9
New shops / shopping centre development	0
Other answer(s)	X
No / Don't know	V

**ASK ALL AT OXFORD STREET**

OX4a Was your journey to the Oxford Street area affected by these diversions and travel changes?  
**SINGLE CODE ONLY**

Yes	1	<b>ASK OX4b</b>
No	2	<b>GO TO Q29a</b>
(Don't know)	X	

**ASK IF JOURNEY AFFECTED BY DIVERSIONS / TRAVEL CHANGES (CODE 1 AT OX4a)**

OX4b How was your journey affected?

**PROMPT USING ANSWERS BELOW IF NECESSARY**  
**MULTICODES POSSIBLE**

Changed usual bus journey	1
Changed usual tube journey	2
Changed walking route / walked a different way	3
Changed cycling route / cycled a different way	4
Changed driving route / drove a different way	5
Avoided getting the bus / didn't use bus	6
Avoided getting the tube / didn't use tube	7
Avoided walking / didn't walk	8
Avoided cycling / didn't cycle	9
Avoided driving / didn't drive	0
(Don't know)	X

**ASK ALL**

Q29a Do you live in one of these local areas?

**SHOW CARD Q29a (SPECIFIC TO LOCATION)**  
**SINGLE CODE ONLY**

1
---

1
---

	2
	3
	4
	5
	6
	7
	8
	9
	0
	1
	2
	3
	4
	5
	6
	7
	8
	9
	0

	2
	3
	4
	5
	6
	7
	8
	9
	0
	1
	2
	3
	4
	5
	6
	7
None of these	0
(Don't know)	X
(Refused)	V

**ASK ALL**

Q29b If you live in a London borough, which one do you live in?

**SINGLE CODE ONLY**

Barking & Dagenham	1
Barnet	2
Bexley	3
Brent	4
Bromley	5
Camden	6
City of London	7
City of Westminster	8
Croydon	9
Ealing	0
Enfield	1
Greenwich	2
Hackney	3
Hammersmith & Fulham	4
Haringey	5
Harrow	6
Havering	7
Hillingdon	8
Hounslow	9
Islington	0

Kensington & Chelsea	1
Kingston-upon-Thames	2
Lambeth	3
Lewisham	4
Merton	5
Newham	6
Redbridge	7
Richmond-upon-Thames	8
Southwark	9
Sutton	0
Tower Hamlets	1
Waltham Forest	2
Wandsworth	3
Do not live in London	0
<b>AND ALSO ASK Q29c</b>	
(Don't know)	X
(Refused)	V

**ASK IF DO NOT LIVE IN A LONDON BOROUGH  
OTHERS GO TO Q30**

Q29c Do you live in...

**READ OUT  
SINGLE CODE ONLY**

The south East of England	1
Elsewhere in England	2
Scotland, Wales or Northern Ireland	3
Outside of the UK	4
(Don't know)	X
(Refused)	V

**CLASSIFICATION**

**ASK ALL**

Q30 Do you have any long-term physical or mental impairment that limits your daily activities or the work you can do, including problems due to old age?

**SHOW CARD Q30  
MULTICODES POSSIBLE**

Mobility impairment	1
Age related mobility difficulties	2
Visual impairment	3
Hearing impairment	4
Learning difficulty	5
Mental health condition	6
Serious long term illness	7
Other (PLEASE CODE AND WRITE IN)	1
None	0
(Refused)	V

**ASK ALL**

Q31 Do you use a wheelchair for travelling?

**SINGLE CODE ONLY**

Yes	1
No	2
(Refused)	V

**CODE FOR ALL**

Q32 IS THE RESPONDENT CARRYING ANY OF THE FOLLOWING?

**CODE BY OBSERVATION – DO NOT ASK  
CODE ALL MENTIONED**

Shopping bag(s) / shopping trolley	1
Buggy / pram	2
Carrying a child / baby	3
Suitcase / rucksack	4
Other large / awkward object	5
Nothing	0

**READ OUT TO ALL**

SAY 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 Synovate and will not be disclosed to third parties. It will be used by Synovate only for this study, which is being undertaken for Transport for London.

**ASK ALL**

Q33 Which of the following age groups do you fall into?

**SHOW CARD Q33**

**SINGLE CODE ONLY**

14-15	1
16-24	2
25-34	3
35-44	4
45-54	5
55-59	6
60-64	7
65-74	8
75 or older	9
(Refused)	V

**CODE FOR ALL – DO NOT ASK**

Q34 INTERVIEWER CODE GENDER

**SINGLE CODE ONLY**

Male	1
Female	2

**ASK ALL**

Q35 Which of the following best describes your working status?

**SHOW CARD Q35**

**SINGLE CODE ONLY**

Working full time (30+ hours a week)	1
Working part time (less than 30 hours a week)	2
A full time student	3
A part time student	4

Not working, but looking for work	5
Not working and not looking for work	6
Retired	7
Looking after family and home	8
Other	0
(Refused)	V

**ASK ALL**

Q36 To which of these ethnic groups do you consider you belong?

**SHOW CARD Q36**

**SINGLE CODE ONLY**

<b><u>White</u></b>	
British	1
Irish	2
Any other White background	3
<b><u>Mixed</u></b>	
White and Black Caribbean	4
White and Black African	5
White and Asian	6
Any other Mixed background	7
<b><u>Asian or Asian British</u></b>	
Indian	8
Pakistani	9
Bangladeshi	0
Any other Asian background	X
<b><u>Black or Black British</u></b>	
Caribbean	1
African	2
Any other Black background	3
<b><u>Chinese or Other Ethnic Group</u></b>	
Chinese	4
Any other ethnic group	5
(Don't know)	X
(Refused)	V

**ASK ALL**

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

**SINGLE CODE ONLY**

1	1
2	2
3	3
4	4
5	5
6 or more	6
(Refused)	V

**ASK ALL**

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

**SINGLE CODE ONLY**

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

**ASK ALL**

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)

**SINGLE CODE ONLY**

Yes, respondent is chief income earner	1
No, someone else is	2
(Refused)	V

**CODE FOR ALL**

Q40 PROBE FOR AND CODE SOCIAL GRADE OF CHIEF INCOME EARNER

**SINGLE CODE ONLY**

A	1
B	2
C1	3
C2	4
D	5
E	6
(Don't know / Could not classify)	X
(Refused)	V

**ASK ALL**

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

**SINGLE CODE ONLY**

Yes	1
No	2

**ASK ALL**

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?

**SINGLE CODE ONLY**

Yes	1
No	2

## 5.2 Interview methodology and sample structure

Interviews were conducted with users of the town centre for shops and services – that is, using the town centre as a destination. Those ‘traveling through’ the town centre and / or not using the shops or facilities (e.g. those on the way to work) were excluded. To match the previously used sample structure, all adults aged 14+ meeting these criteria were considered eligible for interview.

Interviewing were conducted in six hour shifts, across weekdays and weekends (Saturdays and Sundays), with times to cover shopping trading hours. Where known we will not interview during ‘market days’ if it is expected that this will provide a skewed shopper profile.

In order to reflect the distribution of results by day in previous surveys, small corrective weights were applied so that 70% of the results were from weekdays, 20% from Saturdays and 10% from Sundays.

## 5.3 Interviews achieved

A total of 4,907 in-street interviews were conducted in the following locations:

- Bromley (321)
- Camberwell (320)
- Chingford (317)
- Clapham Junction (332)
- Croydon (323)
- Enfield (309)
- Mare Street Hackney (310)
- Kensington High St (312)
- Kingston (320)

- Neasden (312)
- Oxford Street (451)
- Richmond (331)
- Romford (321)
- Wembley (324)
- Wood Green (304)

## 5.4 Sample profiles

### 5.4.1 Overall and by type of town centre

	Total	Central London	Main suburban	Other suburban
	%	%	%	%
Male	42	48	38	44
Female	58	52	62	56
14 to 24	23	31	22	20
25 to 34	22	33	20	21
35 to 44	20	15	20	22
45 to 54	12	8	13	14
55 to 64	11	7	12	12
65 to 74	7	3	8	7
75+	3	2	3	3
White	69	60	79	57
Any BAME	31	39	21	42
Black / Black British	16	20	12	22
Asian / Asian British	9	12	4	15
Mixed	4	5	3	4
Other	1	3	1	1
Any disability / impairment	6	1	7	9
No disability / impairment	93	98	93	90



Working full time	40	51	38	37
Working part time	15	15	15	15
Other	45	34	47	48
ABC1	57	68	60	47
AB	23	28	27	14
C1	34	40	33	33
C2	18	15	17	20
D	11	9	9	14
E	11	6	10	16
C2DE	40	30	36	50
Access to car	48	38	53	41
Access to car, drove today	16	3	21	14
Access to car, didn't drive	31	35	32	27
No access to car	52	61	46	58
<b>Base</b>	<b>4907</b>	<b>763</b>	<b>2561</b>	<b>1583</b>

#### 5.4.2 By town centre

	Bromley	Camberwell	Chingford	Clapham Jn	Croydon	Enfield	Hackney	Kensington	Kingston	Neasden
	%	%	%	%	%	%	%	%	%	%
Male	38	47	31	48	38	36	37	45	36	57
Female	62	53	69	52	62	64	63	55	64	43
14 to 24	17	19	14	26	31	20	23	25	23	24
25 to 34	15	21	11	29	23	17	25	27	13	22
35 to 44	19	27	19	22	20	15	20	16	19	20
45 to 54	13	15	16	10	11	19	13	11	11	12

55 to 64	15	10	18	7	9	14	10	11	18	14
65 to 74	13	5	13	4	4	9	5	5	12	4
75+	8	3	7	1	1	5	3	3	4	2
White	91	54	91	66	73	85	60	65	92	48
Any BAME	9	46	10	34	29	16	41	32	9	53
Black / Black British	5	35	4	23	14	8	28	14	2	24
Asian / Asian British	1	3	2	5	7	4	6	11	4	24
Mixed	1	6	2	4	6	2	5	5	1	3
Other	2	2	2	2	2	2	2	2	2	2
Any disability / impairment	11	11	9	2	8	8	12	3	7	7
No disability / impairment	89	89	89	98	91	92	87	96	92	93
Working full time	38	36	34	48	42	34	31	47	36	38
Working part time	14	19	17	16	17	16	12	16	17	12
Other	48	45	49	36	41	50	57	36	47	48
ABC1	64	51	52	58	55	66	49	67	69	39
AB	28	14	19	26	24	31	13	33	38	10
C1	36	37	33	32	31	35	36	34	31	29
C2	12	18	22	17	23	12	13	12	12	24
D	8	13	7	4	13	10	14	10	8	16
E	12	17	15	10	7	11	21	9	8	15
C2DE	32	48	44	31	43	33	48	31	28	55
Access to car	61	31	65	39	50	59	29	41	61	44
Access to car, drove today	28	5	29	6	24	28	9	4	23	18
Access to car, didn't drive	33	26	36	33	26	31	20	37	38	26
No access to car	37	68	35	61	50	39	70	57	39	54
<b>Base</b>	<b>321</b>	<b>320</b>	<b>317</b>	<b>332</b>	<b>323</b>	<b>309</b>	<b>310</b>	<b>312</b>	<b>320</b>	<b>312</b>

	<b>Oxford Street</b>	<b>Richmond</b>	<b>Romford</b>	<b>Wembley</b>	<b>Wood Green</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Male	49	34	33	50	44
Female	51	66	67	50	56
14 to 24	35	13	18	24	42
25 to 34	37	15	19	25	28
35 to 44	14	24	23	23	15
45 to 54	7	15	13	13	8
55 to 64	4	17	15	7	4
65 to 74	2	11	9	6	3
75+	1	5	3	1	0
White	57	93	89	34	46
Any BAME	41	9	13	66	54
Black / Black British	23	3	5	22	37
Asian / Asian British	12	2	4	37	8
Mixed	4	2	2	5	7
Other	2	2	2	2	2
Any disability / impairment	2	6	9	7	4
No disability / impairment	98	94	90	92	96
Working full time	54	42	30	45	37
Working part time	13	14	17	13	11
Other	32	43	52	41	52
ABC1	68	76	44	44	54
AB	25	41	15	13	15
C1	43	35	29	31	39
C2	18	14	25	22	21

D	9	4	13	19	11
E	4	3	17	13	13
C2DE	31	21	55	54	45
Access to car	35	63	60	36	32
Access to car, drove today	1	15	38	11	8
Access to car, didn't drive	34	48	22	25	24
No access to car	64	36	38	62	67
<b>Base</b>	<b>451</b>	<b>331</b>	<b>321</b>	<b>324</b>	<b>304</b>

## 5.5 Additional data

### 5.5.1 Proximity to town centre, by town centre

	<b>Bromley</b>	<b>Camberwell</b>	<b>Chingford</b>	<b>Clapham Jn</b>	<b>Croydon</b>	<b>Enfield</b>	<b>Hackney</b>	<b>Kensington</b>	<b>Kingston</b>	<b>Neasden</b>
	%	%	%	%	%	%	%	%	%	%
Live / work within 10 mins walk	23	60	55	42	21	36	53	36	24	60
Live within 10 mins walk	15	51	46	30	11	27	42	24	14	49
Work within 10 mins walk	7	8	6	11	9	7	8	9	7	7
Live & work within 10 mins walk	1	1	4	2	1	3	3	3	3	4
No, neither	77	40	45	57	79	64	47	63	76	40
<b>Base</b>	<b>321</b>	<b>320</b>	<b>317</b>	<b>332</b>	<b>323</b>	<b>309</b>	<b>310</b>	<b>312</b>	<b>320</b>	<b>312</b>

	<b>Oxford St</b>	<b>Richmond</b>	<b>Romford</b>	<b>Wembley</b>	<b>Wood Green</b>
	%	%	%	%	%
Live / work within 10 mins walk	14	54	23	45	36
Live within 10 mins walk	2	32	16	33	31
Work within 10 mins walk	12	12	5	7	2
Live & work within 10 mins walk	0	10	2	4	3
No, neither	84	46	77	55	64
<b>Base</b>	<b>451</b>	<b>331</b>	<b>321</b>	<b>324</b>	<b>304</b>

### 5.5.2 Frequency of visiting the town centre, by town centre

	Bromley	Camberwell	Chingford	Clapham Jn	Croydon	Enfield	Hackney	Kensington	Kingston	Neasden
	%	%	%	%	%	%	%	%	%	%
5 or more days a week	17	49	42	35	21	24	45	33	19	41
3 or 4 days a week	11	16	21	13	17	13	12	10	14	18
2 days a week	16	8	12	10	12	18	11	10	12	17
Once a week	22	12	11	14	19	22	12	8	17	9
Once a fortnight	11	3	3	10	12	9	3	8	15	5
About once a month	12	5	4	10	11	7	4	15	9	3
Less than once a month	10	7	5	7	6	6	9	12	13	6
First time	1	0	1	2	1	2	4	4	2	1
Don't Know	0	0	0	0	0	0	1	0	0	0
<b>Mean (visits per month)</b>	<b>8</b>	<b>14</b>	<b>14</b>	<b>11</b>	<b>9</b>	<b>10</b>	<b>13</b>	<b>10</b>	<b>8</b>	<b>13</b>
<b>Base</b>	<b>321</b>	<b>320</b>	<b>317</b>	<b>332</b>	<b>323</b>	<b>309</b>	<b>310</b>	<b>312</b>	<b>320</b>	<b>312</b>

### 5.5.2 Frequency of visiting the town centre, by town centre (continued)

	Oxford St	Richmond	Romford	Wembley	Wood Green
	%	%	%	%	%
5 or more days a week	16	39	16	47	32
3 or 4 days a week	7	19	14	15	19
2 days a week	6	13	16	7	10
Once a week	12	13	21	15	18
Once a fortnight	13	6	11	6	8
About once a month	16	5	11	3	6
Less than once a month	23	5	9	7	5
First time	6	1	2	1	2
Don't Know	0	0	0	1	0
<b>Mean (visits per month)</b>	<b>6</b>	<b>13</b>	<b>8</b>	<b>14</b>	<b>11</b>
<b>Base</b>	<b>451</b>	<b>331</b>	<b>321</b>	<b>324</b>	<b>304</b>

### 5.5.3 Mode usage, by town centre

	Bromley	Camberwell	Chingford	Clapham Jn	Croydon	Enfield	Hackney	Kensington	Kingston	Neasden	Oxford St	Richmond	Romford	Wembley	Wood Green
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Bus	42	56	22	45	47	35	35	29	46	33	24	30	35	50	51
Walk	13	35	44	23	8	33	38	27	17	43	4	28	17	29	27
Car	28	5	27	5	22	28	7	4	23	17	1	14	38	10	8
Tube	0	1	1	3	0	0	2	35	0	3	61	6	0	5	9
Train	12	1	2	21	10	1	10	3	4	0	8	14	6	2	3
Bicycle	1	1	1	3	3	1	5	2	5	1	1	5	1	0	1
Tram	0	0	0	0	8	0	0	0	0	0	0	0	0	0	0
Taxi / Minicab	1	0	1	0	1	1	0	0	0	0	1	0	1	1	0
<b>Base</b>	<b>321</b>	<b>320</b>	<b>317</b>	<b>332</b>	<b>323</b>	<b>309</b>	<b>310</b>	<b>312</b>	<b>320</b>	<b>312</b>	<b>451</b>	<b>331</b>	<b>321</b>	<b>324</b>	<b>304</b>



#### 5.5.4 Mode usage, by proximity to town centre

	<b>Total</b>	<b>Live / work within 10 mins walk of town centre</b>	<b>Live / work more than 10 mins walk away</b>
	<b>%</b>	<b>%</b>	<b>%</b>
Bus	<b>38</b>	<b>26</b>	<b>46</b>
Walk	<b>25</b>	<b>54</b>	<b>8</b>
Car	<b>15</b>	<b>9</b>	<b>20</b>
Tube	<b>10</b>	<b>5</b>	<b>13</b>
Train	<b>7</b>	<b>3</b>	<b>8</b>
Bicycle	<b>2</b>	<b>2</b>	<b>2</b>
Tram	<b>1</b>	<b>0</b>	<b>1</b>
Taxi / Minicab	<b>0</b>	<b>0</b>	<b>1</b>
<b>Base</b>	<b>4907</b>	<b>1856</b>	<b>3031</b>

### 5.5.5 Main reason for bus usage, by town centre

	Bromley	Camberwell	Chingford	Clapham Jn	Croydon	Enfield	Hackney	Kensington	Kingston	Neasden
	%	%	%	%	%	%	%	%	%	%
Cheaper / less expensive	7	11	15	27	18	14	15	23	32	13
Quicker	14	24	6	18	16	13	26	22	12	17
Easier / more convenient	12	17	24	9	14	14	17	18	15	21
More direct	12	20	14	25	14	8	11	10	5	10
No car / can't drive	16	2	12	5	6	27	5	1	15	110
Only method possible	12	12	13	6	13	9	10	5	3	6
Avoids parking difficulties	8	5	3	5	9	3	2	5	8	5
More relaxing/comfortable	2	2	5	1	1	1	1	3	1	5
<b>Base: All bus users</b>	<b>134</b>	<b>178</b>	<b>70</b>	<b>147</b>	<b>150</b>	<b>107</b>	<b>107</b>	<b>93</b>	<b>143</b>	<b>103</b>

### 5.5.5 Main reason for bus usage, by town centre (continued)

	Oxford St	Richmond	Romford	Wembley	Wood Green
	%	%	%	%	%
Cheaper / less expensive	49	19	11	19	15
Quicker	10	12	4	19	26
Easier / more convenient	13	23	7	13	18
More direct	11	3	5	16	11
No car / can't drive	0	19	45	13	7
Only method possible	2	5	11	7	9
Avoids parking difficulties	0	6	9	6	1
More relaxing/comfortable	6	2	0	1	4
<b>Base: All bus users</b>	<b>108</b>	<b>98</b>	<b>110</b>	<b>160</b>	<b>154</b>

### 5.5.6 Frequency of using bus to town centre, by town centre

	<b>Bromley</b>	<b>Camberwell</b>	<b>Chingford</b>	<b>Clapham Jn</b>	<b>Croydon</b>	<b>Enfield</b>	<b>Hackney</b>	<b>Kensington</b>	<b>Kingston</b>	<b>Neasden</b>
	%	%	%	%	%	%	%	%	%	%
<i>At least once a week</i>	43	76	42	61	51	44	65	45	41	64
5 or more days a week	11	37	13	21	15	17	26	13	13	15
3 or 4 days a week	8	21	14	13	13	10	13	7	8	22
2 days a week	11	8	8	14	12	9	15	12	9	17
Once a week	13	11	7	14	10	8	10	13	11	9
Once a fortnight	6	2	6	11	10	3	5	5	11	6
About once a month	10	6	7	10	10	9	5	8	9	4
Less than once a month	10	8	11	9	13	13	8	13	18	8
First time	1	0	2	2	1	1	1	2	1	0
Never	29	7	32	6	16	29	16	26	21	16
<b>Mean (trips per month)</b>	<b>5</b>	<b>12</b>	<b>6</b>	<b>9</b>	<b>7</b>	<b>6</b>	<b>9</b>	<b>6</b>	<b>6</b>	<b>9</b>
<b>Base</b>	<b>321</b>	<b>320</b>	<b>317</b>	<b>332</b>	<b>323</b>	<b>309</b>	<b>310</b>	<b>312</b>	<b>320</b>	<b>312</b>

### 5.5.6 Frequency of using bus to town centre, by town centre (continued)

	Oxford St	Richmond	Romford	Wembley	Wood Green
	%	%	%	%	%
<i>At least once a week</i>	20	47	35	67	65
5 or more days a week	5	16	9	35	20
3 or 4 days a week	4	11	7	14	17
2 days a week	4	10	9	9	11
Once a week	7	10	11	9	16
Once a fortnight	9	6	8	4	7
About once a month	12	6	8	5	6
Less than once a month	20	14	10	7	7
First time	5	0	0	1	1
Never	33	27	37	13	14
<b>Mean (trips per month)</b>	<b>3</b>	<b>7</b>	<b>4</b>	<b>11</b>	<b>9</b>
<b>Base</b>	<b>451</b>	<b>331</b>	<b>321</b>	<b>324</b>	<b>304</b>

### 5.5.7 Main reason for visiting town centre, by town centre:

	<b>Bromley</b>	<b>Camberwell</b>	<b>Chingford</b>	<b>Clapham Jn</b>	<b>Croydon</b>	<b>Enfield</b>	<b>Hackney</b>	<b>Kensington</b>	<b>Kingston</b>	<b>Neasden</b>
	%	%	%	%	%	%	%	%	%	%
Shopping	69	48	50	49	78	65	48	60	67	38
Using services	8	12	26	9	3	17	8	5	7	21
Eating/drinking out	3	10	3	11	5	4	11	8	6	7
Other social and leisure	4	3	4	7	3	2	7	7	2	7
Personal business	4	3	3	4	3	4	4	2	2	5
Use public amenity	3	7	4	3	3	4	8	2	1	6
Work here	2	1	2	3	1	1	1	1	1	5
Live here	1	6	1	3	0	0	3	8	1	1
Visiting friends and relatives	1	3	2	4	1	1	4	1	4	4
Window shopping	1	2	1	2	2	3	1	2	1	1
General recreation	1	1	1	0	0	0	1	1	2	2
Travelling through area	0	0	0	4	1	0	1	0	0	0
Dropping off/picking up	0	0	1	1	0	0	2	0	1	0
<b>Base</b>	<b>321</b>	<b>320</b>	<b>317</b>	<b>332</b>	<b>323</b>	<b>309</b>	<b>310</b>	<b>312</b>	<b>320</b>	<b>312</b>

**5.5.7 Main reason for visiting town centre, by town centre (continued):**

	<b>Oxford St</b>	<b>Richmond</b>	<b>Romford</b>	<b>Wembley</b>	<b>Wood Green</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Shopping	65	60	75	40	55
Using services	1	12	8	13	7
Eating/drinking out	4	10	4	8	9
Other social and leisure	5	6	4	3	6
Personal business	7	2	2	7	3
Use public amenity	2	3	1	3	6
Work here	9	2	1	4	2
Live here	1	1	0	7	2
Visiting friends and relatives	1	1	1	4	2
Window shopping	3	2	1	3	5
General recreation	1	1	0	2	1
Travelling through area	0	0	1	2	0
Dropping off/picking up	0	0	1	0	0
<b>Base</b>	<b>451</b>	<b>331</b>	<b>321</b>	<b>324</b>	<b>304</b>

### 5.5.8 Main reason for visiting town centre, by proximity to town centre:

	<b>Total</b>	<b>Live / work within 10 mins walk</b>	<b>More than 10 mins walk away</b>
	<b>%</b>	<b>%</b>	<b>%</b>
Shopping	58	54	60
Using services	10	13	9
Eating/drinking out	7	8	6
Other social and leisure	5	4	5
Personal business	4	3	4
Use public amenity	4	4	4
Work here	3	5	1
Live here	2	5	0
Visiting friends and relatives	2	1	3
Window shopping	2	2	2
General recreation	1	1	1
Travelling through area	1	1	1
Dropping off/picking up	0	1	0
<b>Base</b>	<b>4907</b>	<b>1856</b>	<b>3031</b>



**5.5.9 Main reason for visiting town centre, by frequency of visiting town centre:**

	<b>Visit 3+ times per week</b>	<b>Visit 1-2 times per week</b>	<b>Visit 1-2 times per month</b>	<b>Visit less than once a month</b>	<b>First time visit</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Shopping	53	64	66	56	50
Using services	12	12	6	9	1
Eating/drinking out	9	4	5	6	4
Other social and leisure	4	4	5	5	18
Personal business	3	4	5	6	7
Use public amenity	4	4	3	3	2
Work here	5	1	1	1	2
Live here	4	1	0	0	0
Visiting friends and relatives	1	2	4	5	4
Window shopping	2	2	2	3	7
General recreation	1	1	1	1	1
Travelling through the area	1	1	1	2	2
Dropping off / picking up	0	1	0	1	0
<b>Base</b>	<b>2222</b>	<b>1311</b>	<b>816</b>	<b>446</b>	<b>102</b>

### 5.5.10 Suggested improvements to town centre, by type of town centre

	Total	Central London	Main suburban	Other suburban
	%	%	%	%
<i>Any improvement(s) suggested</i>	81	87	74	89
Cleaner streets	31	35	27	34
Better range of shops	30	31	21	46
Less traffic	30	51	22	32
Improve shops / better quality shops	20	22	14	30
Remove undesirables / more policing	19	12	16	27
More leisure facilities	19	21	16	23
More pleasant / greener environment	18	21	17	19
More public spaces	18	30	17	15
Reduce pollution	16	25	13	15
Longer shop opening hours	16	26	14	14
More / easier parking	15	15	12	19
Better bus service	15	22	13	16
More shops	13	13	9	20
Improve pedestrian environment	11	9	12	11
High street should be pedestrianised	9	11	9	8
Improved cycle facilities	7	7	7	9
Improved priority for buses	6	7	5	6
Improve access to bus stop locations	4	5	3	4
<b>Base</b>	<b>4907</b>	<b>763</b>	<b>2561</b>	<b>1583</b>

### 5.5.11 Suggested improvements to town centre, by town centre

	<b>Bromley</b>	<b>Camberwell</b>	<b>Chingford</b>	<b>Clapham Jn</b>	<b>Croydon</b>	<b>Enfield</b>	<b>Hackney</b>	<b>Kensington</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
<i>Any improvement(s) suggested</i>	71	92	87	90	83	62	87	81
Cleaner streets	16	41	22	49	37	9	43	25
Better range of shops	29	48	48	34	14	18	44	27
Less traffic	11	45	16	59	4	11	32	40
Improve shops / better quality shops	22	28	23	25	12	8	33	13
Remove undesirables / more policing	16	29	30	19	33	11	21	11
More leisure facilities	11	26	13	28	18	6	39	17
More pleasant / greener environment	11	22	9	29	28	6	23	20
More public spaces	6	16	4	42	11	3	15	13
Reduce pollution	9	27	9	40	6	3	17	24
Longer shop opening hours	10	14	9	21	18	4	20	17
More / easier parking	13	14	31	21	11	4	13	10
Better bus service	6	15	11	35	11	4	13	12
More shops	13	20	19	15	9	6	26	10
Improve pedestrian environment	6	12	4	23	13	3	9	6
High street should be pedestrianised	4	4	3	15	6	9	16	8
Improved cycle facilities	6	15	6	10	3	2	10	6
Improved priority for buses	4	9	3	17	3	2	4	6
Improve access to bus stop locations	2	4	2	10	2	3	4	4
<b>Base</b>	<b>321</b>	<b>320</b>	<b>317</b>	<b>332</b>	<b>323</b>	<b>309</b>	<b>310</b>	<b>312</b>

### 5.5.11 Suggested improvements to town centre, by town centre (continued)

	Kingston	Neasden	Oxford St	Richmond	Romford	Wembley	Wood Green
	%	%	%	%	%	%	%
<i>Any improvement(s) suggested</i>	71	88	92	73	50	92	91
Cleaner streets	25	19	41	15	23	44	46
Better range of shops	13	42	34	14	11	47	32
Less traffic	11	9	58	28	4	56	49
Improve shops / better quality shops	5	32	29	8	4	32	27
Remove undesirables / more policing	13	30	12	5	12	25	22
More leisure facilities	12	16	23	22	6	24	29
More pleasant / greener environment	20	20	21	7	9	22	22
More public spaces	15	15	43	27	5	22	27
Reduce pollution	9	6	26	13	4	16	22
Longer shop opening hours	13	7	33	10	7	18	27
More / easier parking	12	19	18	12	5	18	19
Better bus service	11	13	29	10	3	25	21
More shops	5	12	15	3	6	25	12
Improve pedestrian environment	8	10	12	27	3	21	12
High street should be pedestrianised	3	5	13	28	2	13	9
Improved cycle facilities	10	3	7	10	2	10	10
Improved priority for buses	6	4	8	3	2	12	6
Improve access to bus stop locations	3	5	6	2	0	7	4
<b>Base</b>	<b>320</b>	<b>321</b>	<b>451</b>	<b>331</b>	<b>321</b>	<b>324</b>	<b>304</b>

**5.5.12 Suggested ways to increase cycling (prompted), by type of town centre:**

	<b>Total</b>	<b>Central London</b>	<b>Main suburban</b>	<b>Other suburban</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
<i>Anything</i>	34	39	33	32
(More) cycle lanes	17	20	17	16
Less road traffic	17	25	16	14
(More) cycle paths	15	11	17	14
(Better) parking in this area	8	6	9	8
Bicycle hire scheme	7	7	6	8
Free on-road cycle training	4	3	3	5
(Better) parking at home	3	1	2	5
None of these / Nothing	63	58	64	65
Don't know	3	3	3	3
<b>Base</b>	<b>4907</b>	<b>763</b>	<b>2561</b>	<b>1583</b>

**5.5.13 Suggested ways to increase cycling (prompted), by type of town centre:**

	<b>Bromley</b>	<b>Camberwell</b>	<b>Chingford</b>	<b>Clapham Jn</b>	<b>Croydon</b>	<b>Enfield</b>	<b>Hackney</b>	<b>Kensington</b>	<b>Kingston</b>	<b>Neasden</b>
	%	%	%	%	%	%	%	%	%	%
<i>Anything</i>	28	29	25	36	36	43	41	35	45	37
(More) cycle lanes	13	19	13	21	17	17	25	20	25	10
Less road traffic	10	15	10	26	17	18	23	18	22	9
(More) cycle paths	13	16	12	14	18	25	28	12	27	8
(Better) parking in this area	6	5	6	9	8	10	10	4	17	15
Bicycle hire scheme	4	7	3	8	7	3	12	4	11	12
Free on-road cycle training	2	3	2	4	4	3	7	2	6	6
(Better) parking at home	1	4	1	2	4	2	6	2	3	12
None of these / Nothing	70	69	72	59	62	56	56	62	52	60
Don't know	2	2	3	5	2	1	3	3	3	3
<b>Base</b>	<b>321</b>	<b>320</b>	<b>317</b>	<b>332</b>	<b>323</b>	<b>309</b>	<b>310</b>	<b>312</b>	<b>320</b>	<b>312</b>

**5.5.13 Suggested ways to increase cycling (prompted), by type of town centre (continued):**

	<b>Oxford St</b>	<b>Richmond</b>	<b>Romford</b>	<b>Wembley</b>	<b>Wood Green</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
<i>Anything</i>	41	35	20	28	26
(More) cycle lanes	19	19	7	13	14
Less road traffic	30	16	9	14	12
(More) cycle paths	11	19	8	6	7
(Better) parking in this area	6	14	3	5	5
Bicycle hire scheme	8	4	2	9	5
Free on-road cycle training	4	3	3	5	4
(Better) parking at home	1	3	2	4	2
None of these / Nothing	56	64	76	66	70
Don't know	3	1	4	6	4
<b>Base</b>	<b>451</b>	<b>331</b>	<b>321</b>	<b>324</b>	<b>304</b>

## 5.6 Average values used for average monthly spend calculation

Average monthly spend was calculated by multiplying the claimed frequency of visiting the town centre (in an average month) (Q5) by the claimed typical spend per visit to that town centre (Q25). Exact figures were not used, and average values were assigned to each of the answers at Q5 and Q25 as shown below. The calculation was only performed for those respondents who gave answers to both questions.

Q43 How often do you visit the area shown on this map?

Answer	value (to calculate number of days per month)
5 or more days a week	22
3 or 4 days a week	14
2 days a week	8
Once a week	4
Once a fortnight	2
About once a month	1
Less than once a month	0.5
First time	0.01
(Don't know)	excluded from analysis

Q44 How much do you typically spend on average per visit to this area?

Answer	value (to calculate spend)
Nothing	£0.00
Under £1	£0.50
£1 - £4.99	£3.00
£5 - £9.99	£7.50
£10 - £14.99	£12.50



£15 - £19.99	£17.50
£20 - £29.99	£25.00
£30 - £49.99	£40.00
£50 - £74.99	£62.50
£75 - £99.99	£87.50
£100 - £149.99	£125.00
£150 - £199.99	£175.00
£200+	£225.00
(Don't know)	excluded from analysis
(Refused)	excluded from analysis