Town Centres 2013

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EXECUTIVE SUMMARY

Introduction

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

This research follows previous town centres studies in 2011, 2009, 2003-4 and 1999. The locations varied between studies although a few were covered in one or more. The locations were always a mix of regional, local and international town centres.

Method

Face-to-face research was conducted on-street with a sample of about 300 visitors to each of 14 town centres.

- **Central London**: Aldgate, Oxford Street/Regent Street
- **Inner London**: Bethnal Green, Hackney, Harlesden, Kingsland High Street, Hornchurch, Shepherds Bush, Wood Green
- **Outer London**: Bromley, Ealing Broadway, Hounslow, Kingston, Romford Town.

Fieldwork was conducted between 5 March and 12 April 2013. 4,345 interviews were conducted, about 300 at each town centre except Hackney where there was a booster of 160 interviews.

Main Findings

- Purpose of Visit
    - The majority of visitors to most town centres lived and/or worked more than ten minutes walk from the town centre.
    - Shopping was the main reason for visiting the town centres: for 75% it was one of the purposes and for 60% the main purpose. Eating and drinking out was also important being mentioned by 23% but was only the main purpose for 7%.

- Time Spent in Town Centre
    - 69% of visitors were planning to spend at least one hour in the town centre with 45% spending between one and three hours.
    - Those who walked and cycled to the area tended to spend less time in the town centre. Those who travelled by train/Tube (83%), car (80%) and bus (67%) were planning to spend more than an hour in the town centre.

- Frequency of Visiting
    - 77% of visitors were visiting the area once a week or more often. The average number of visits per month was 11.3.
    - Those who walk to the area are the most frequent visitors (49% visit five days a week or more) followed by train/Tube users (31%) and bus users (28%). Car users visit less often (17%).

- Shopping and Expenditure in the Area
  - 45% were shopping for groceries and food, 29% were shopping for clothes or footwear, 19% were using a service and 16% were eating out.
  - The average spend was £37 on the day of interview which is similar to the usual spend per visit (£34). The average spend per week was £69. The mean monthly spend is £277
  - Average spend per visit by mode was car £46, train/Tube £41, bus £32, walk £25 and cycle £22.
  - Average spend per week by mode was walk £86, bus £73, car £62, train/Tube £48 and cycle £48
  - Average spend per month by mode was walk £346, bus £292, train/Tube £239, car £247 and cycle £190.

- Mode of Transport
  - 34% use bus to access the town centre, 27% walk, 13% use train/Tube, 12% use car and 2% cycle.
  - 50% use the Tube to go to Central London (5-9% elsewhere). 20% use car in Outer London town centres compared to 10% in Inner London and 2% in Central London.
  - The main reason for using each mode is: car: quicker (27%), bus: cheaper (29%), train/Tube: quicker (54%), cycle: need/enjoy the exercise (34%) and walk: live very close by (37%).
  - Walking was the most frequently used mode. The weekly mean frequency for the different modes was: car 1.8, bus 2.7, train/Tube 2.3, bicycle 2.6 and walk 3.8.
  - Car drivers were satisfied with the ease of access to town centre by car and the number of parking spaces provided (mean scores of 7.5 and 7.3 respectively on a scale from 0, very dissatisfied to 10, very satisfied).

- Attitudes to and Use of Bus
  - 76% sometimes use the bus to travel in the area of the town centre
  - Bus use increased by 3% compared to twelve months ago
  - Bus customers were most positive about the ease of getting on and off the bus (mean score 7.98) and the convenience of bus stops (7.71). Bus users were least satisfied with value for money (6.83) and the level of crowding on the bus (7.0)
  - There was strong agreement that there should be stricter bus lane enforcement (mean score 7.71), that bus stops are conveniently located (7.43) and for goods vehicles not to be allowed in bus lanes (6.97)
  - The top three single factors that would encourage greater use of the bus were more regular/frequent buses (11%), lower fares (10%) and faster journeys (6%).

- Attitudes towards Town Centres
  - The main ways that the town centres could be improved were better range of shops (32%), to make the streets cleaner (27%) and improving shops/better quality shops (21%). 18% said nothing could be done.
  - 67% of town centre visitors felt very safe and 29% felt fairly safe during the day. Of those who went out in the town centre after dark, only 30% said they felt very safe and 42% fairly safe.

- Oxford Street/Regent Street
    - Oxford Street is visited because of its shopping facilities: 36% considered it to be the best shopping area, 20% were visiting a particular shop and 18% cited 'more/better/bigger range of shops'
    - 29% were aware of the changes to travel around Tottenham Court Road
    - Of those who were aware 43% knew it was because of building rail/Crossrail station
    - 39% had used the diagonal crossing at Oxford Circus and there were very high levels of satisfaction with both the safety and ease of crossing the road on the diagonal crossing.

1. INTRODUCTION

1.1 Background

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

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

This research follows previous town centres studies in 2011, 2009, 2003-4 and 1999.

1.2 Objectives

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

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

2. METHODOLOGY

2.1 Introduction

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

The research was undertaken in 14 locations around London. These were selected by TfL in order to provide a range of different types of centre in terms of economic mix, scale of retail activity/presence of major stores, transport networks, road layout, traffic flow, parking provision etc as well as allowing for some comparisons with previous Town Centres surveys. In addition, some of the sites were chosen as they had town centre schemes planned. The locations were:

- Aldgate
- Bethnal Green
- Bromley
- Ealing
- Hackney
- Harlesden
- Hornchurch
- Hounslow
- Kingsland High Street
- Kingston
- Oxford Street/Regent Street
- Romford Town
- Shepherds Bush
- Wood Green.

Bromley, Kingston and Oxford Street/Regent Street were also surveyed in 2011, 2009 and 2004. Ealing, Hackney, Harlesden and Wood Green were also surveyed in 2011 and Romford was also surveyed in 2009.

For analysis purpose these were grouped as follows:

- **Central London**: Aldgate, Oxford Street/Regent Street
- **Inner London**: Bethnal Green, Hackney, Harlesden, Kingsland High Street, Hornchurch, Shepherds Bush, Wood Green
- **Outer London**: Bromley, Ealing Broadway, Hounslow, Kingston, Romford Town.

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

- **International**: Oxford Street/Regent Street
- **Metropolitan**: Bromley, Ealing, Wood Green, Kingston, Hounslow, Romford Town, Shepherds Bush
- **Major**: Kingsland High Street, Hackney
- **District**: Bethnal Green, Harlesden, Hornchurch.

Aldgate was unclassified as not included as a town centre in the London Plan.

2.2   Method

Face-to-face interviews using a Computer Aided Personal Interview (CAPI) questionnaire programmed for Personal Digital Assistants (PDAs) were undertaken for the majority of the fieldwork. This was supplemented with face-to-face interviews using paper questionnaires for just 29 interviews[1].

At each town centre interviewing was conducted at three[2] Enumeration Points (EPs) in order to ensure that all parts of the centre were included and all types of visitor were covered.

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

Respondents were selected using a random 1 in 3 approach.

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

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

The core fieldwork was conducted between 5 March and 12 April 2013. The target was 300 interviews in each of the town centres, except Hackney where the target was 450: 4,350 interviews in total.

In practice 4,345 interviews were conducted as follows:

- Aldgate   291
- Bethnal Green   290
- Bromley   304
- Ealing Broadway   307
- Hackney   460
- Harlesden   299
- Kingsland High Street   289
- Hornchurch   308
- Hounslow   306
- Kingston   298
- Oxford Street/Regent Street   296
- Romford Town   300

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[1] for technical reasons eg when PDA did not work
[2] except Harlesden where there were two EPs

- Shepherds Bush   301
- Wood Green   297

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

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

Enumeration Points

Where the town centre had been covered before we used the same EPs as before. There was one exception: at Hackney where EP1 was moved a third of the way up Amhurst Road and EP3 was added in Mare Street. For 'new' town centres[3] the selection of the locations was on the basis that they provided good customer traffic flow, eg central points within the town.

Weighting

The target distribution of interviews was 70% weekday, 20% Saturday and 10% Sunday. The achieved interview distribution was 73% weekday, 19% Saturday and 8% Sunday.

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

In addition, the data from Hackney was weighted from 463 to 300 interviews for the overall analysis so that Hackney responses were not over represented in the overall analysis.

The resulting overall weighted sample size was 4,185.

Questionnaire

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

- Satisfaction with waiting facilities at the bus stop
- Use of pedestrian information signs
    - If yes, ease of use and whether information on the signs was helpful
- ease of movement around the area

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

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[3] Aldgate, Bethnal Green, Hornchurch, Hounslow, Kingsland High Street, Shepherds Bush

2.3   Retail Park Pilot

In the town centres research to date retail parks had not been covered. Transport for London wished to address this omission. However, as much of the standard town centre questionnaire was not applicable and because the sampling of respondents was necessarily different a pilot study was undertaken at Tottenham Hale retail park.

Sampling was undertaken at six EPs and at each the interviewer covered the entrances to all the stores in their area so that, over the whole of the research, all stores were evenly sampled.

Details of the sampling method are included in Appendix D and a copy of the paper version of the questionnaire is included in Appendix E.

The fieldwork was conducted between 27 March and 7 April 2013.

2.4   Hackney

At Hackney town centre, because of the planned pedestrianisation of Narrow Way leading to the rerouting of some buses some additional research was undertaken. This comprised:

- A booster of 150 interviews to the visitor survey and some additional questions
- Fifteen interviews with retail and catering outlet managers in the town centre
- An interview with the Town Centre Manager.

The method for each of these is described below:

A booster of 150 on street interviews with some additional questions

A booster of 150 interviews to make the planned total 450 interviews. An 'after' survey is planned for autumn 2013 with a similar sample size to gauge the impact of the changes and the larger sample size will allow for robust 'before' and 'after' comparisons to be made.

The questionnaire included the following additional questions for Hackney town centre respondents:

- For bus users:
  - bus number used
  - Which stop got off at
  - Satisfaction with the amount of time it took to walk from the bus stop to where you wanted to go today'
- Which roads visited or planned to visit.

The Hackney Town Centre results are integrated within the main findings presented in Chapter 3. The additional questions for Hackney respondents are reported on in Chapter 4.

Fifteen interviews with retail and catering outlet managers in the town centre

The interviews were undertaken face-to-face with managers of retail and catering establishments in Mare Street (both the northern part 'Narrow Way' and the southern part). Minimum and achieved quotas on business type are shown below:

- Business Type   Minimum   Achieved
  - Retail   5   7
  - Catering   5   8
- Size of Business
  - Sole Trader   1   1
  - 2 to 4   2   4
  - 5 to 9   2   6
  - 10 to 20   1   2
  - 20+   1   2

A copy of the questionnaire is included in Appendix F.

An interview with the Town Centre Manager

The town centre manager for Hackney, Hannah Dalgleish, was interviewed to ascertain her views on the town centre as a whole and specifically on the impacts of the proposed pedestrianisation.

The interview was conducted by telephone on 10 April 2013.

The topic guide is attached as Appendix G.

3. FINDINGS

3.1 Introduction

This chapter sets out the findings of the 2013 Town Centre study.

The findings are based on interviews at the following 14 town centres:

- Aldgate
- Bethnal Green
- Bromley
- Ealing Broadway
- Hackney
- Harlesden
- Kingsland High Street
- Hornchurch
- Hounslow
- Kingston
- Oxford Street/Regent Street
- Romford Town
- Shepherds Bush
- Wood Green.

The weighted overall sample size was 4,185.

Changes over time

A similar research approach and questionnaire has been used in the last four phases of town centres studies (2013, 2011, 2009 and 2003-4) and this provides an opportunity for temporal comparisons.

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

Table 1: Town centres surveyed in 2004, 2009, 2011 and 2103

	2004	2009	2011	2013
Aldgate				✓
Bethnal Green				✓
Bexleyheath			✓	
Bromley	✓	✓	✓	✓
Camberwell		✓	✓	
Chingford		✓		
Clapham Junction		✓	✓	
Croydon		✓	✓	
Dalston	✓			
Ealing			✓	✓
Eltham	✓			
Enfield		✓		
Feltham	✓			
Greenwich			✓	
Hackney		✓	✓	✓
Harlesden	✓		✓	✓
Harrow	✓		✓	
High Street Kensington	✓	✓		
Hornchurch				✓
Hounslow				✓
Ilford	✓			
Kingsland High Street				✓
Kingston	✓	✓	✓	✓
Neasden		✓		
Oxford Street/Regent Street	✓	✓	✓	✓
Peckham	✓			
Richmond		✓		
Romford		✓		✓
Shepherds Bush				✓
Stratford			✓	
Wembley		✓		
Wood Green		✓	✓	✓
Woolwich			✓	

Structure

The research findings are structured as follows:

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

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

- Oxford Street/Regent Street

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

- Respondent Characteristics.

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

3.2 Purpose of Visit

Summary

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

Visitors to Inner London town centres were much more likely to live within 10 minutes of the centre (40%) than those visiting Outer London town centres (21%) or Central London (8%).

Shopping was the main reason for visiting the town centres: for 75% it was one of the purposes and for 60% the main purpose. Eating and drinking out was also important being mentioned by 23% but was only the main purpose for 7%.

The town centres are used by both those who live and work in the area and by visitors from outside the area. The majority (59%) do not live or work within 10 minutes walk of the town centre but 25% live in the area, 13% work in the area and 3% both live and work within 10 minutes walk of the town centre.

Figure 1: Whether live or work within 10 minutes walk

Weighted base: all respondents: 4,185

Figure 2 shows that those visiting Inner London town centres were much more likely to live within 10 minutes of the centre (40%[4]) than those visiting Outer London town centres (21%) or Central London (8%).

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

Weighted base: Central London 586; Inner London 2,084; Outer London 1,515

Oxford Street/Regent Street and Romford were the locations most likely to attract visitors from a wider catchment area (79% and 76% respectively from more than 10

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[4] 36% live and 4% live and work

minutes walk away). By contrast, over half of those visiting Bethnal Green, Kingsland High Street, Aldgate and Harlesden (65%, 58%, 57% and 53% respectively) lived or worked within 10 minutes of the town centre.

Comparison over time

After a slight increase from 2004 to 2011 in the proportion visiting town centres from further than 10 minutes walk away, the 2013 data matches the 2004 data.

	2013	**2011**	**2009**	**2004**
Live/work within 10 minutes walk	41%	37%	38%	41%
Neither	59%	63%	62%	59%

Reasons for visiting town centre

All visitors were recruited on the basis that they were shopping, using a service or doing both in the centres[5]. Shopping was the predominant purpose and the main reason for visiting for three quarters of the visitors. Eating and drinking out was also important, being mentioned by 23%, but was only the main purpose for 7%. All reasons and the main reasons for visiting the area are as shown in Table 2.

Table 2: Reasons for visiting town centre

	All purposes %	**Main purpose %**
Shopping	75	60
Eating/drinking out	23	7
Using service	20	9
Work here	10	9
Live here	7	3
Visiting friends and relatives	5	3
Personal business	5	3
Window shopping	4	1
Using public amenity	4	2
Other social/leisure	3	2
Travelling through the area	2	1
General recreation	1	*
Dropping off/picking up friend or relative	1	*
Delivering goods	*	*
Buying petrol	*	0
Other	1	1
Weighted base	**4,185**	**4,185**

* = less than 0.5%

Table 3 shows the reasons for visiting according to the type of centre. Comparisons between centres suggest that those visiting Central London were more likely to be doing so because they work there.

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

Table 3: Reasons for visit by type of centre

	Central London		Inner London		Outer London	
	All purposes %	Main purpose %	All purposes %	Main purpose %	All purposes %	Main purpose %
Shopping	57	43	75	60	82	66
Eating/drinking out	39	13	18	7	23	6
Using service	20	7	21	9	19	8
Work here	25	23	8	6	8	7
Live here	5	3	10	4	5	1
Visiting friends and relatives	7	3	5	3	4	3
Personal business	3	1	6	3	4	2
Window shopping	4	1	3	1	5	1
Using public amenity	4	2	5	2	4	2
Other social/leisure	3	1	4	2	2	1
Travelling through the area	5	2	2	1	2	1
General recreation	1	*	2	1	1	*
Dropping off/picking up friend or relative	2	0	1	*	1	*
Delivering goods	0	0	*	*	*	0
Buying petrol	0	0	*	0	*	0
Other	1	1	*	1	1	1
Weighted base)	**586**	**586**	**2,084**	**2,084**	**1,515**	**1,515**

* = less than 0.5%

All reasons

The reasons for visiting were similar for most areas as shown in Appendix B. However, those visiting Aldgate were much less likely to be there for shopping compared with other centres (36% compared to between 67% and 84% for the other town centres).

Only 10% were using a service at Oxford Street/Regent Street compared to between 15% and 31% elsewhere.

A half were eating or drinking out in Aldgate as were 34% in Kingston, 29% in Oxford Street/Regent Street and 27% in Bromley compared to between 11% and 23% elsewhere.

Main Reason

As regards the main reason for being in the centre the most notable variations from the average were in Romford where a higher proportion were shopping (73%) and in Aldgate where the lowest proportion were shopping (18%).

At Aldgate 21% were eating/drinking out compared to between 4% and 11% elsewhere. Nearly a third (31%) at Aldgate work in the area compared to between 3% and 14% elsewhere.

The main reason for visiting each centre is shown in Table 71 in Appendix B.

Comparison over time

Main changes over time are that shopping has increased since 2011 after falling from 2004 to 2011 and 'work here' and 'live here' have decreased since 2011.

Main reason	2013	2011	2009	2004
Shopping	60%	53%	58%	64%
Eating/drinking out	7%	5%	7%	3%
Using services	9%	8%	10%	8%
Live here	3%	6%	2%	4%
Work here	9%	10%	3%	7%
Personal business	3%	4%	4%	3%
Window shopping	1%	2%	2%	1%
Visiting friends and relatives	3%	3%	2%	1%
Using public amenity	2%	3%	4%	1%
Other social/leisure	2%	2%	5%	1%

3.3   Time Spent in Town Centre

Summary

69% of visitors were planning to spend at least one hour in the town centre with 45% spending between one and three hours.

Those who walked and cycled to the area tended to spend less time in the town centre. Those who travelled by train/Tube (83%), car (80%) and bus (67%) were planning to spend more than an hour in the town centre.

The majority (69%) said they were planning to spend at least one hour in the town centre with 45% spending between one and three hours.

Figure 3: Time spent in town centre
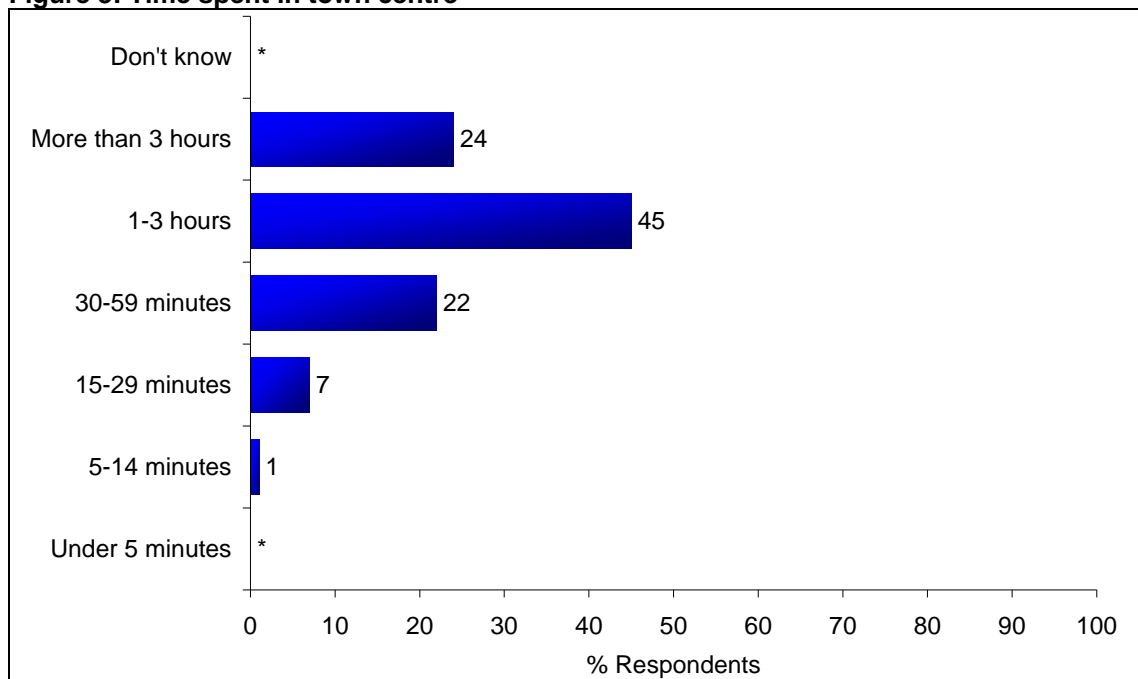
Weighted base: all respondents: 4,185
* = less than 0.5%

Eighty-one per cent in central London town centres spent over one hour in the town centre compared to 79% in Outer London town centres and 58% in Inner London town centres.

Figure 4: Time spent in town centre by type of centre
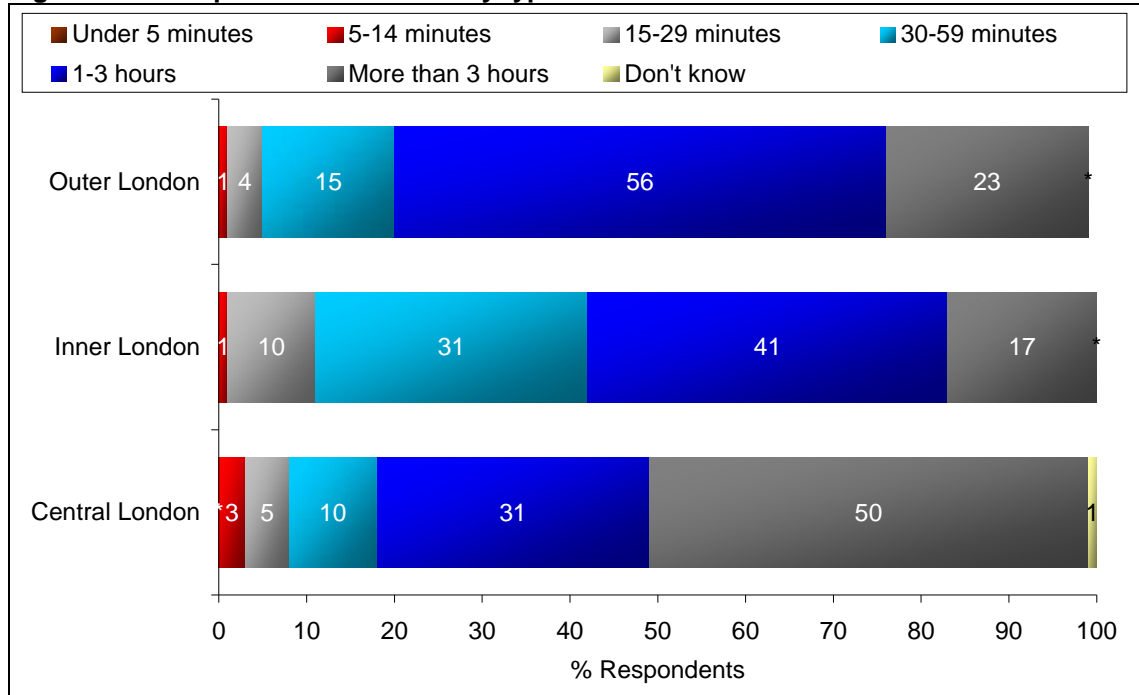
Weighted base: Central London 586; Inner London 2,084; Outer London 1,515
* = less than 0.5%

Those in the West End, Aldgate and Kingston were planning on spending the most time in the town centre (an average of 2.7 hours for Oxford Street/Regent Street and 2.3 hours for the other town centres). Those in Harlesden (1.2 hours), Bethnal Green and Hackney (1.6 hours) were making the briefest visits.

Those who walked and cycled to the area tended to spend less time in the town centre but high proportions of those who travelled by train/Tube (83%), car (80%) and bus (67%) were planning to spend more than an hour in the town centre.

Figure 5: Time spent in town centre by mode

Legend: Under 5 minutes | 5-14 minutes | 15-29 minutes | 30-59 minutes | 1-3 hours | More than 3 hours | Don't know

Mode	Under 5 min	5-14 min	15-29 min	30-59 min	1-3 hours	More than 3 hours
Taxi/minicab/other	2		5	13	46	34
Walk		2	12	31	42	12 *
Bicycle		3	7	32	38	20
Train/tube	2		5	10	37	46 *
Bus	1		6	26	50	17 *
Car	*		4	16	55	25 *
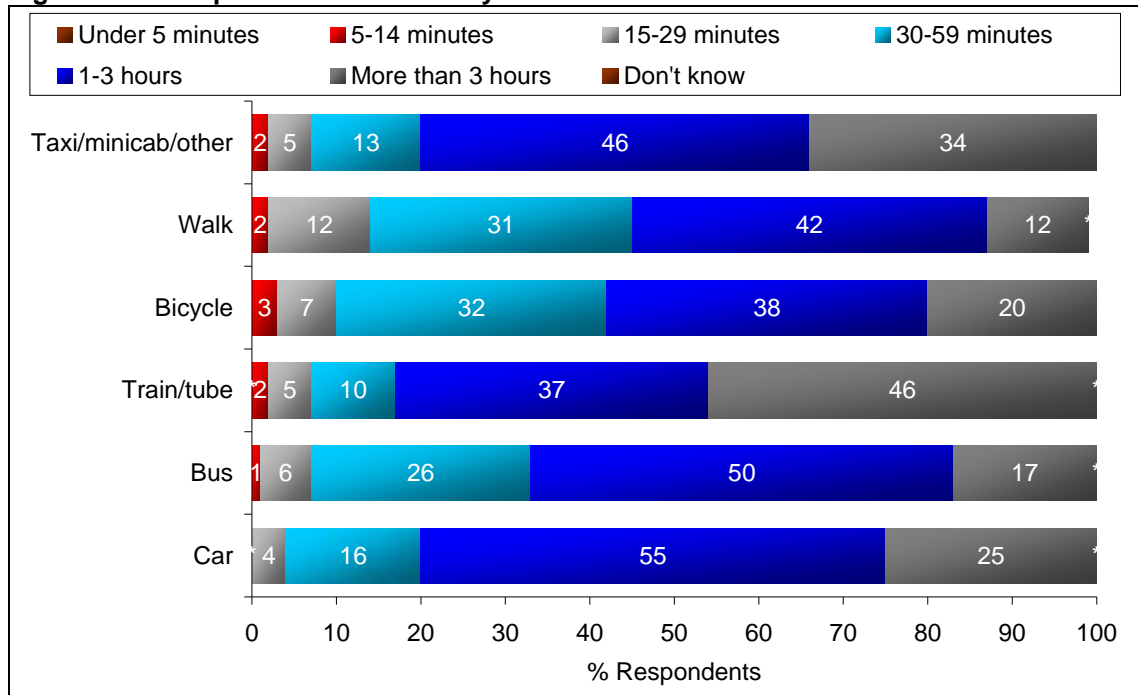
Weighted base: car 600, bus 1,420, train/Tube 926, bicycle 72, walk 1,126, taxi/minicab/other 41

* = less than 0.5%

3.4 Frequency of Visiting

Summary

77% of visitors were visiting the area once a week or more often.

The average number of visits per month was 11.3.

Train/Tube and bus users visit the centres frequently (31% and 28% respectively visit five days a week or more often). Those who walk to the area are the most frequent visitors (49% visit five days a week or more). Car users visit less often (17% visiting five days a week or more).

The majority visit the town centre on a regular basis with 77% visiting the area once a week or more often as shown in Figure 6. The exception to this is in the West End where only 32% said they visited the area once a week or more often.

Figure 6: Frequency of visiting town centre

Category	%
5 or more days a week	33
3 or 4 days a week	15
2 days a week	14
Once a week	15
Once a fortnight	7
About once a month	6
Less than once a month	8
First time	3
Don't know	*
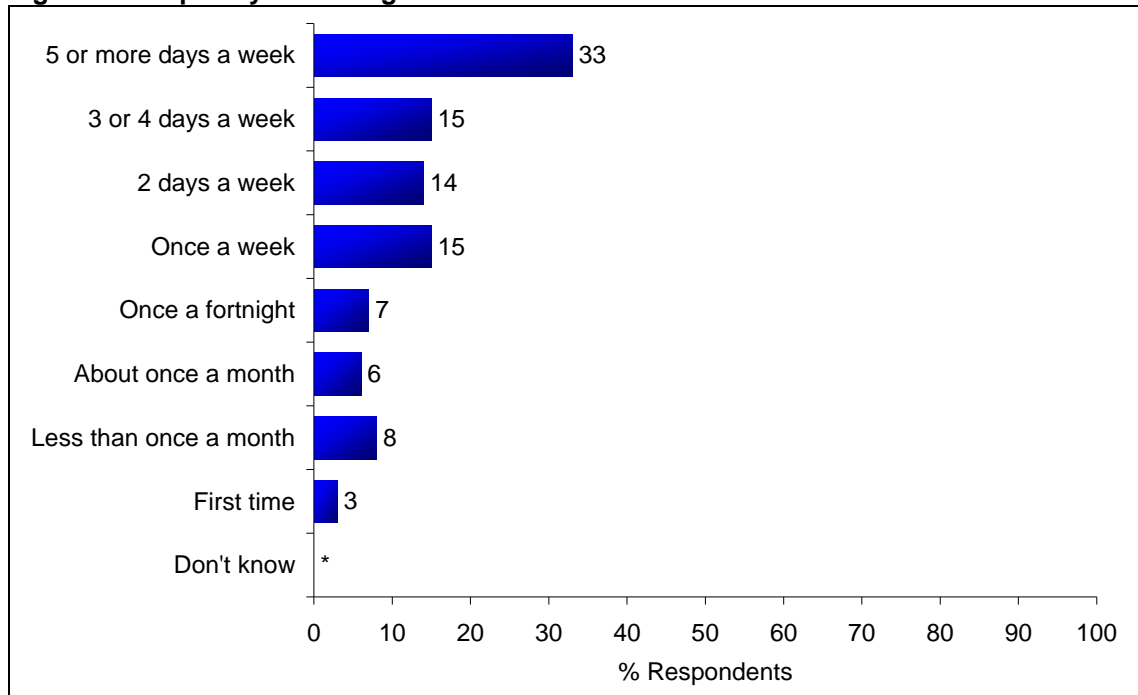
% Respondents

Weighted base: all respondents: 4,185
* = less than 0.5%

The average number of visits per month was 11.3[6]. This is slightly higher than the average in 2011 and 2009 (11.0) and slightly higher than the average of 10 in 2004.

Figure 7: Frequency of visiting area by type of centre

	5 or more days a week	3 or 4 days a week	2 days a week	Once a week	Once a fortnight	About once a month	Less than once a month	First time	monthly mean
Outer London	25	14	15	21	9	8	7	2	9.8
Inner London	37	18	15	14	6	5	4	2	12.6
Central London	39	8	5	7	4	9	20	9	10.6
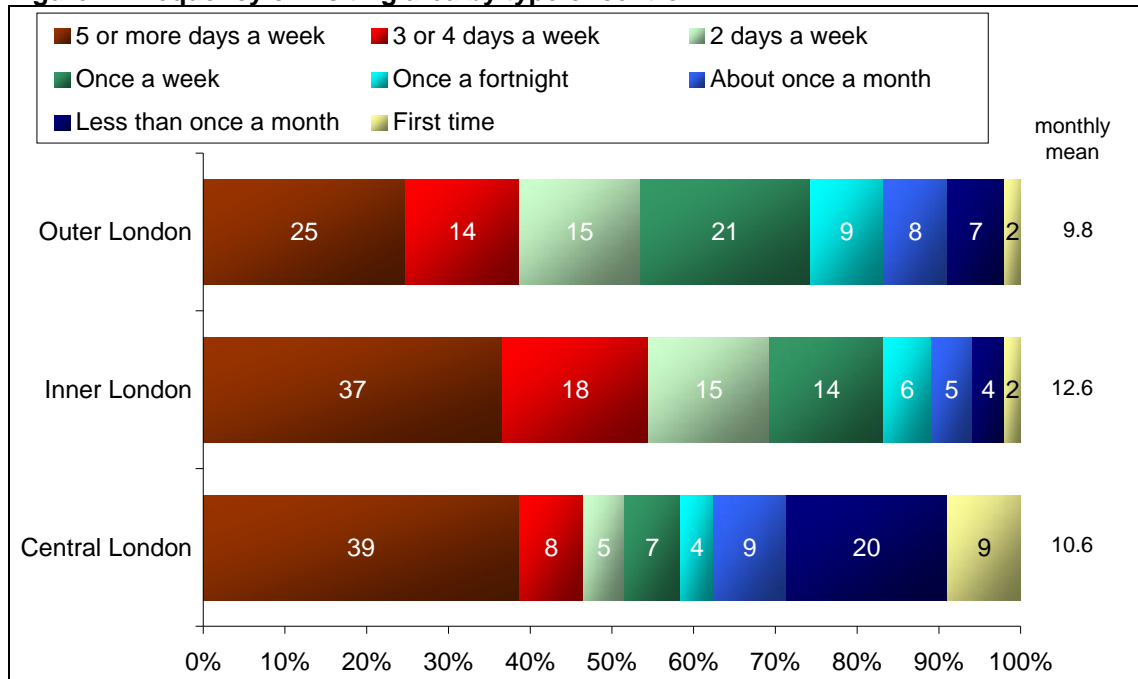
Weighted base: Central London 586; Inner London 2,084; Outer London 1,515

Bethnal Green and Harlesden are the centres visited most frequently (88% visit once a week or more often) and Kingsland High Street (86%), Hackney (85%), Hornchurch (85%) and Aldgate (84%) also have a high proportion of frequent visitors.

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

Bromley, Shepherds Bush and Kingston and have a relatively low proportion of frequent visitors (69%, 69% and 68% respectively visit once a week or more). See Table 73 in Appendix B.

Tube/train and bus users visit the centres frequently (31% and 28% respectively visit five days a week or more often), however, as might be expected, those who walk to the area are the most frequent visitors (49% visit five days a week or more).

Car users, however, tend to visit slightly less often with 17% visiting five days a week or more often as shown in Table 4.

Table 4: Frequency of visit by mode of access

	Car %	Bus %	Train/Tube %	Bicycle %	Walk %	Taxi/mini-cab/ other %
5 or more days a week	17	28	31	29	49	16
3 or 4 days a week	11	19	7	8	20	7
2 days a week	11	18	6	20	15	17
Once a week	27	17	12	23	10	13
Once a fortnight	13	7	7	11	2	8
About once a month	11	6	12	4	1	5
Less than once a month	9	5	18	3	1	13
First time	2	1	7	1	1	21
Weighted base	**600**	**1,420**	**926**	**72**	**1,126**	**41**

Frequency of visit by town centre categories used in the London Plan is shown in Table 5. This shows that the highest frequency of visit is from visitors to District town centres and the lowest frequency of visit is from visitors to International town centres.

Table 5: Frequency of visit by London Plan town centre category

	International %	Metropolitan %	Major %	District %	Unclassified %
5 or more days a week	17	28	37	37	61
3 or 4 days a week	5	15	17	19	10
2 days a week	4	14	16	16	6
Once a week	6	18	16	15	7
Once a fortnight	6	8	5	5	2
About once a month	15	8	4	4	2
Less than once a month	32	7	5	3	8
First time	14	2	1	1	4
Monthly mean	**5.4**	**10.4**	**12.6**	**12.8**	**15.7**
Weighted base	**296**	**2,114**	**589**	**897**	**291**

Comparison over time

There has been an increase in frequency of visit over time.

	2013	2011	2009	2004
Once a week or more	77%	75%	73%	73%
Once a fortnight	7%	7%	8%	7%
Once a month	6%	8%	8%	9%
Less often	11%	9%	9%	11%

3.5 Mode of Transport

Summary

Over a third (34%) use bus to access the town centre, 27% walk, 13% use train/Tube, 12% use car and 2% cycle.

Half use the Tube to go to Central London (5-9% elsewhere). 20% use car in Outer London town centres compared to 10% in Inner London and 2% in Central London.

The main reason for using each mode is: **car:** quicker (27%), **bus:** cheaper (29%), **train/Tube:** quicker (54%), **cycle:** need/enjoy the exercise (34%) and **walk:** live very close by (37%).

Walking was the most frequently used mode. The weekly mean frequency for the different modes was: car 1.8, bus 2.7, train/Tube 2.3, bicycle 2.6 and walk 3.8.

Car drivers were satisfied with the ease of access to town centre by car and the number of parking spaces provided (mean scores of 7.5 and 7.3 respectively on a scale from 0, very dissatisfied to 10, very satisfied).

Bus was the mode of access used by the highest proportion of visitors (34%). Twenty seven per cent walked to the town centre, 13% used the Tube and 12% used a car/van/lorry as shown in Figure 8.

Figure 8: Mode of access to area
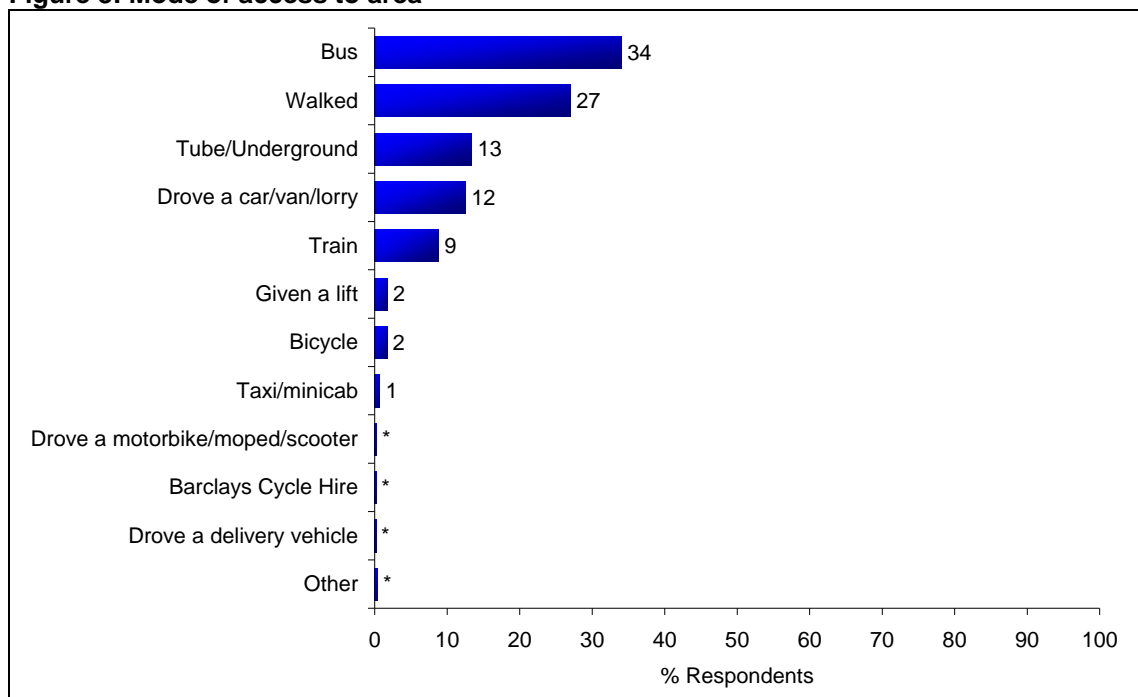
Weighted base: all respondents: 4,185
* = less than 0.5%

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

Table 6: Mode of access to area by whether live or work within 10 minutes walk of centre

	Live %	Work %	Both %	Neither %
Drove a car/van/lorry	3	12	12	17
Drove a motorbike/moped/scooter	*	1	1	*
Drove a delivery vehicle	0	*	0	*
Given a lift	*	1	1	2
Bus	16	26	18	44
Tube/Underground	1	26	5	16
Train	*	22	1	10
Bicycle	1	3	2	2
Barclays Cycle Hire	0	*	0	*
Walked	76	10	61	8
Taxi/minicab	*	*	0	1
Other	1	*	0	*
Weighted base	**1,063**	**550**	**133**	**2,437**

* = less than 0.5%

Figure 9 shows that the most popular means of transport used to reach Central London was the Tube (50%). A fifth drove to the Outer London town centres compared to 10% for Inner London and just 2% for Central London. Over a third (36%) walked to the town centre in Inner London compared to 21% in Outer London and 12% in Central London.

Figure 9: Mode of access to area by type of centre
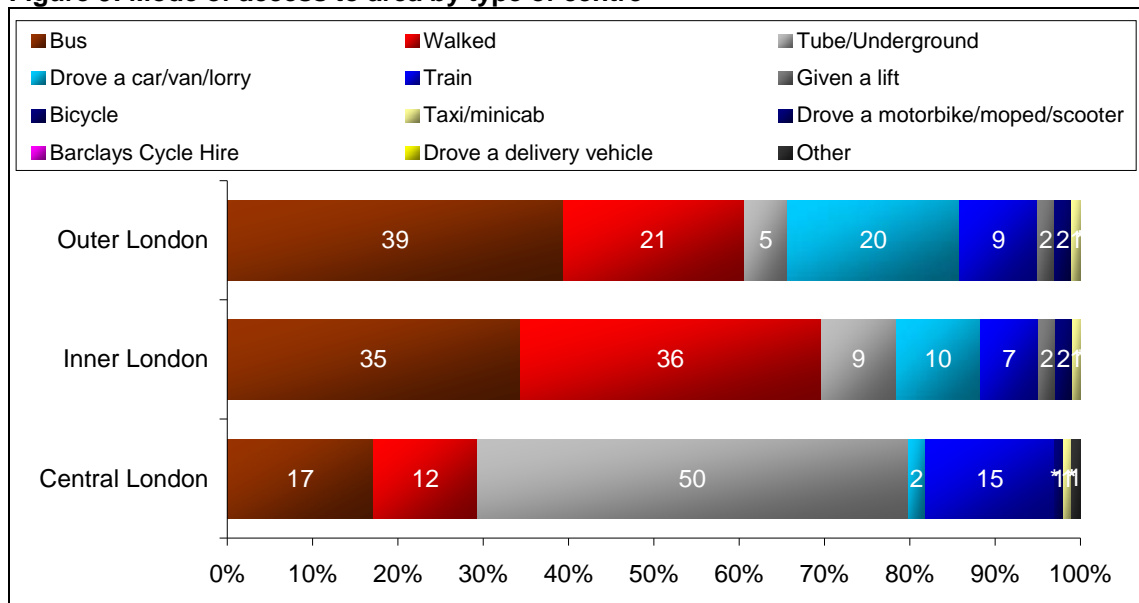
Weighted base: Central London 586; Inner London 2,084; Outer London 1,515
* = less than 0.5%

Walking was the predominant means of accessing the town centre in Bethnal Green (52%), Harlesden (44%) and Kingsland High Street (40%). Tube was the predominant means of accessing Oxford Street/Regent Street (62%) and Aldgate (38%). At all other centres bus was the predominant means of access.

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[7] Weighted average of 76% who live within 10 minutes walk and 61% who live and work within 10 minutes walk

Bus use was highest in Bromley, Hackney and Romford (43%) and lowest in Oxford Street/Regent Street (12%). This represents a large fall in bus use: it was 24% in 2011, 2009 and 2004.

Tube use was particularly high in Oxford Street/Regent Street (62%) and there is no Tube service in Bromley, Kingsland High Street, Romford, Hornchurch, Hackney and Kingsland High Street.

Car use was highest in Hornchurch (33%), Romford (30%), Kingston (25%) and Bromley (24%) and very low in Oxford Street/Regent Street (1%), Aldgate (2%), Hackney (3%), Shepherds Bush (4%) and Bethnal Green (4%).

Train use was highest in Hackney (17%) and Aldgate (16%) and very low in Hornchurch (less than 0.5%), Harlesden (2%), Bethnal Green (3%) and Hounslow (3%).

Walking as an access mode was highest at Bethnal Green (52%), Harlesden (44%) and Kingsland High Street (40%) and lowest at Oxford Street/Regent Street (7%) and Romford (11%).

In Kingsland High Street, 7% mentioned cycle.

See Table 72 in Appendix B for a full breakdown.

Comparison over time

There has been a steady decrease in car use over time. The largest change since 2011 is an increase in Train/Tube use.

	2013	2011	2009	2004
Bus	34%	36%	38%	34%
Walk	27%	28%	25%	29%
Car	12%	14%	16%	20%
Train/Tube	22%	17%	17%	14%
Bicycle	2%	2%	2%	1%

Characteristics of users of different modes

Bus users were more likely to be retired and have lower household incomes than other mode users.

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

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

Cyclists were more likely to be male, White and working than other mode users. See Table 7.

Table 7: Profile of mode users

	Car %	Bus %	Train/ Tube %	Bicycle %	Walk %
Age					
16-34	25	40	49	47	39
35-44	25	18	19	15	18
45-59	33	20	22	31	25
60+	16	20	9	5	17
Gender					
Male	37	37	45	68	44
Female	63	62	54	31	56
Employment status					
Working	72	54	77	87	55
Student	3	11	10	4	11
Not working	11	14	5	4	17
Retired	12	19	6	4	16
Ethnic group					
White	74	62	67	84	62
Asian	9	14	12	1	13
Black	12	19	13	11	19
Mixed/Other	3	4	6	3	5
Household income*					
Under £20,000	9	38	19	23	39
£20,000-£34,999	28	34	25	23	29
£35,000-£74,999	49	23	43	50	28
£75,000 or over	14	5	13	5	5
Weighted base	**600**	**1,420**	**926**	**72**	**1,126**

* after excluding don't knows and refuseds

Why Modes used

The reasons for choosing to travel by the particular mode used to access the area are shown in Table 8. Train/Tube in particular were considered to be quicker (69%), as were car (52%) and bicycle (45%). Car, bus and train/Tube were considered to be easier/more convenient than other modes.

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

A high proportion travelled by bus because it was cheaper (41%), with 13% saying it was the only mode available.

Over four tenths of those who walked (41%) said they lived close by and 18% said they need/enjoy the exercise.

Over half (51%) of those who cycled said they need/enjoy the exercise, 45% said it was quicker and 42% cited low cost.

Table 8: Reasons for using chosen method of transport rather than any other method of transport to access area by mode

	Car %	Bus %	Train/ Tube %	Bicycle %	Walk %
Quicker	52	32	69	45	37
More direct	29	30	39	16	20
Cheaper/less expensive	10	41	9	42	19
Easier/more convenient	34	25	26	14	11
Live very close by	2	4	1	11	41
More relaxing/comfortable	20	9	10	4	5
Only method possible	2	13	6	0	4
Going to more than one place	17	4	4	10	5
Need/enjoy exercise/healthy	*	1	0	51	18
Avoids parking difficulties	2	7	6	13	3
No car/can`t drive	1	11	2	1	3
Had heavy bags/shopping to carry	12	2	*	0	1
Safer	4	5	3	1	1
Weather issues	9	3	2	0	2
Travelling with children	6	2	1	0	1
Avoid the congestion charge	*	*	1	0	0
Weighted base	**600**	**1,420**	**926**	**72**	**1,126**

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

The **main** reasons for choosing to travel by the particular mode used to access the area are shown in Table 9. The main reasons for each mode are:

- **car:** quicker (27%)
- **bus:** cheaper (29%)
- **train/Tube:** quicker (54%)
- **cycle:** need/enjoy the exercise (34%)
- **walk:** live very close by (37%).

Table 9: Main reason for using chosen method of transport rather than any other method of transport to access area

	Car %	Bus %	Train/ Tube %	Bicycle %	Walk %
Quicker	27	16	54	24	18
Cheaper/less expensive	3	29	3	22	9
Easier/more convenient	21	13	11	5	5
More direct	12	12	16	1	7
Live very close by	0	2	*	5	37
Only method possible	2	11	5	0	3
Need/enjoy exercise/healthy	0	*	0	34	13
More relaxing/comfortable	7	2	2	1	2
Going to more than one place	10	1	2	3	3
No car/can't drive	1	7	1	0	1
Avoids parking difficulties	1	3	2	4	1
Weather issues	4	1	1	0	1
Had heavy bags/shopping to carry	8	1	0	0	*
Travelling with children	4	1	*	0	1
Safer	1	1	*	0	0
Avoid the congestion charge	0	*	*	0	0
Weighted base	**600**	**1,420**	**926**	**72**	**1,126**

* = less than 0.5%

Other modes of transport sometimes used

Just over a third (32%) did not use any modes other then the one they used to access the town centre.

Buses were the most used 'other' mode. Over a half of those who accessed the town centre on foot or by cycle (54% and 53% respectively) sometimes used the bus and more than a third of train/Tube (37%) and car (37%) users also sometimes used buses to travel to the town centres.

Sixteen per cent of bus users sometimes used a car or train to the town centre and 14% sometimes used the Tube.

A fifth of bus and 16% of bicycle users also sometimes walk to the town centres.

Table 10: Other modes used to town centre, by mode used:

	Total %	Car %	Bus %	Train/ Tube %	Bicycle %	Walk %	Taxi/ minicab/ other %
No other mode used	34	42	33	34	19	31	27
Car/van/lorry	11	1	16	8	16	10	15
Motorbike/moped/scooter	*	1	1	*	3	*	0
Bus	29	37		37	53	54	29
Tube	9	5	14	8	12	5	15
Train	10	11	16	7	12	4	0
Bicycle	2	1	2	2		4	0
Barclays Cycle Hire	*	0	*	*	1	*	0
Walk	11	10	20	11	16		19
Taxi/minicab	6	6	8	3	3	4	5
Other	*	*	*	*	1	*	0
Weighted base	**4,185**	**600**	**1,420**	**926**	**72**	**1,126**	**41**

* = less than 0.5%

Frequency of mode use

Almost half (49%) of those who walked to the town centre walked there five or more days a week.

Car was the mode used least frequently (15% five or more days a week).

The weekly mean frequency for the different modes was:

- car   1.8
- bus   2.7
- train/Tube   2.3
- bicycle   2.6
- walk   3.8.

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

Legend: 5 or more days a week | 3 or 4 days a week | 2 days a week | Once a week | Once a fortnight | About once a month | Less than once a month | First time

Mode	5 or more days a week	3 or 4 days a week	2 days a week	Once a week	Once a fortnight	About once a month	Less than once a month	First time
Walk	49	19	15	10	2	1	2	1
Bicycle	27	12	20	22	9	7	3	
Train/tube	31	7	7	12	7	11	18	7
Bus	28	17	19	16	7	5	5	1
Car	15	11	12	25	12	12	12	2
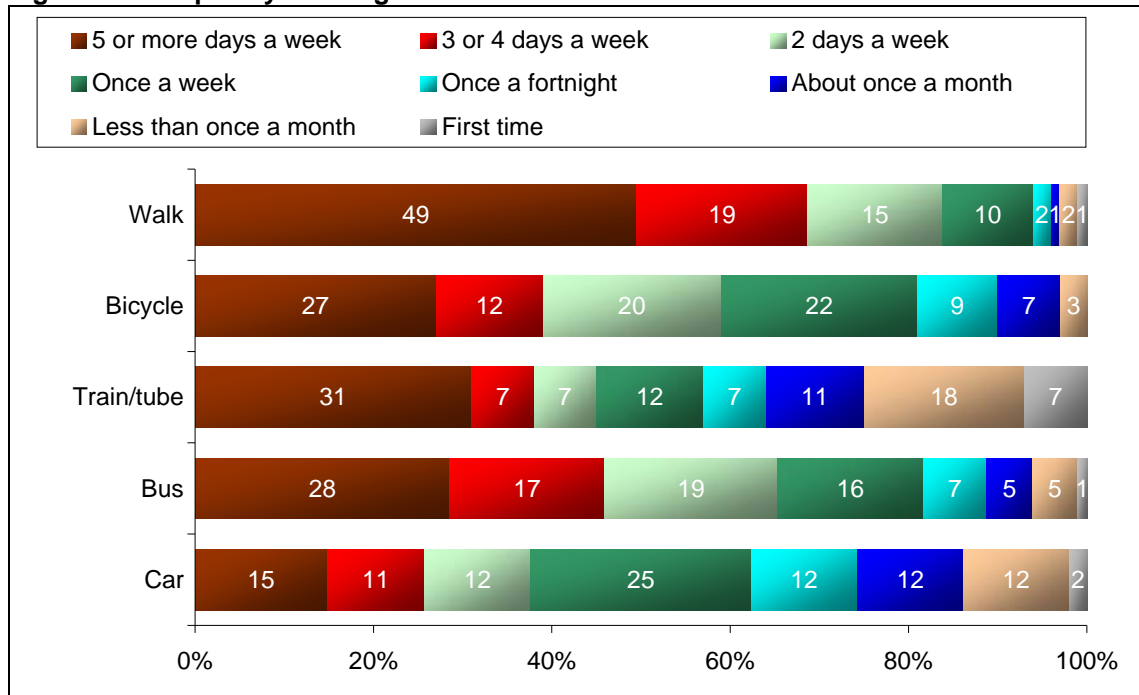
Weighted base: car 600, bus 1,420, train/Tube 926, bicycle 72, walk 1,126

Parking

Those who had driven to the centre (600 people) were asked about parking in the area and ease of access to the area by car.

Over half (57%) had parked in an off-street municipal/NCP car park. Eleven per cent parked in a store/pub/take-away car park.

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

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

Figure 11: Parking location by centre type[8]

Parking location	Outer London	Inner London	Total
Off street municipal/NCP car park	70	39	57
In store/pub/take-away car park	7	16	11
Off street private parking (eg driveway)	6	12	8
Off street residential parking	5	11	8
On side road	2	9	5
Other place	4	3	4
On main road	1	2	2
Don't know	5	8	6
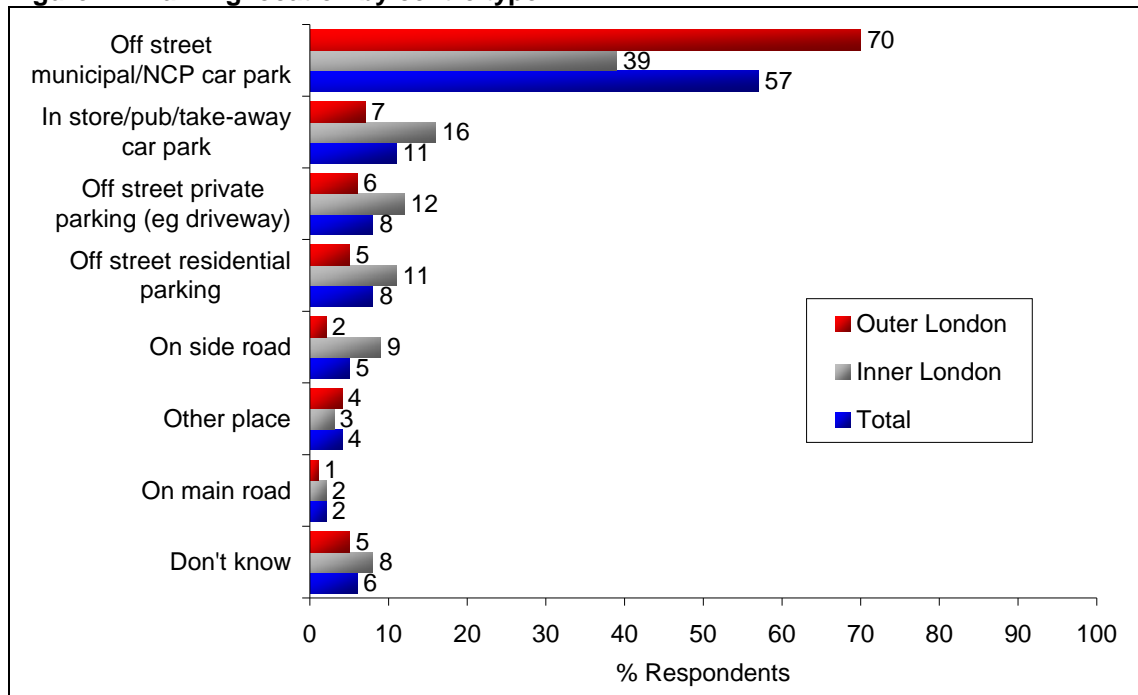
Weighted base: 597 who had driven to area; 240 Inner London, 344 Outer London

Car users to Romford, Kingston, Bromley and Hounslow were most likely to have used a municipal/NCP car park (82%, 73%, 67% and 66% respectively).

Car users to Bethnal Green and Harlesden were most likely to park on the main road and side road (40% and 35% respectively).

Car users to Hackney, Kingsland High Street and Hornchurch were most likely to park in a store/pub/take-away car park (28%, 20% and 20% respectively).

Car users to Shepherds Bush were most likely to park in off street residential parking (38%).

Car users' satisfaction with parking

A majority of car drivers were satisfied with the ease of access to town centre by car and the number of parking spaces provided (mean scores of 7.5 and 7.3 respectively on a scale from 0, very dissatisfied to 10, very satisfied) as shown in Figure 12.

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

Figure 12: Satisfaction with ease of access to the area by car and number of parking spaces provided in this area
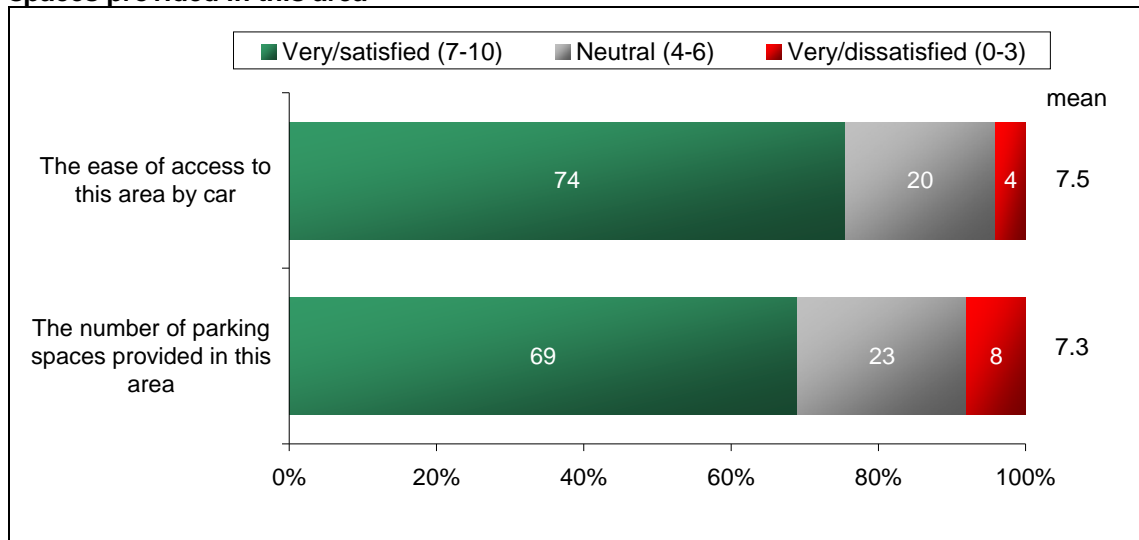
Weighted base: 600 who drove to the town centre

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

Figure 13: Satisfaction with ease of access to the area by car and number of parking spaces provided in this area by type of area
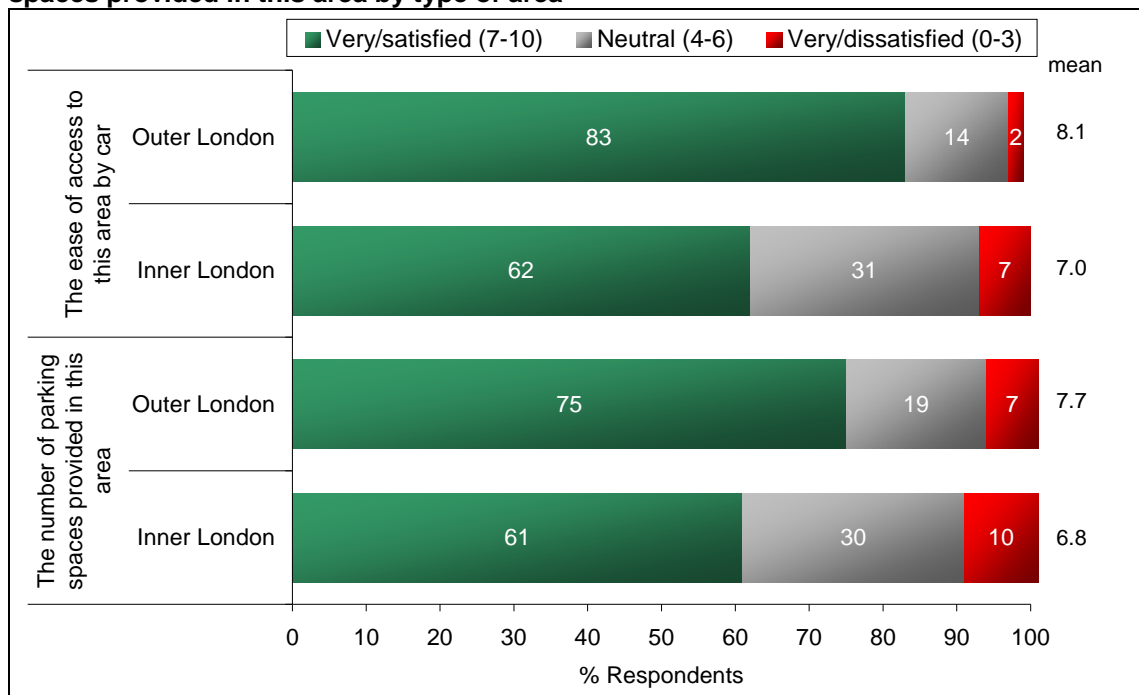
Weighted base: those who had driven to area: Inner London 240, Outer London 344

The least satisfied with the number of parking spaces were drivers at Oxford Street/Regent Street (mean score 4.2), Hounslow and Harlesden (5.1) and the most satisfied with the number of parking spaces were drivers at Romford (mean score 7.8) and Kingsland High Street (7.7).

Figure 14: Satisfaction with number of parking spaces provided by town centre
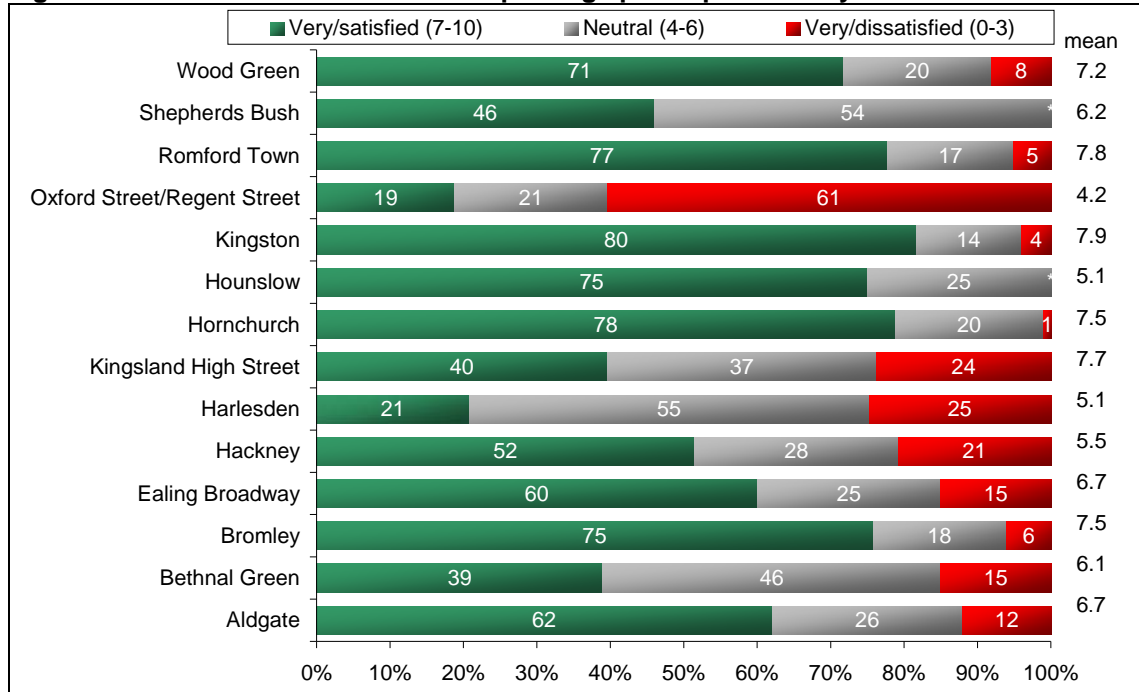
Weighted base: Aldgate 8, Bethnal Green 20, Bromley 81, Ealing Broadway 40, Hackney 16, Harlesden 34, Kingsland High Street 20, Hornchurch 115, Hounslow 41, Kingston 83, Oxford Street/Regent Street 5, Romford Town 100, Shepherds Bush 13, Wood Green 23
* = less than 0.5%

The least satisfied with the ease of access to the town centre were drivers at Oxford Street/Regent Street (mean score 5.6) and Harlesden (5.7) and the most satisfied with ease of access to the town centre were drivers at Romford (mean score 8.6) and Kingston (8.3).

Figure 15: Satisfaction with ease of access to town centre by car by town centre
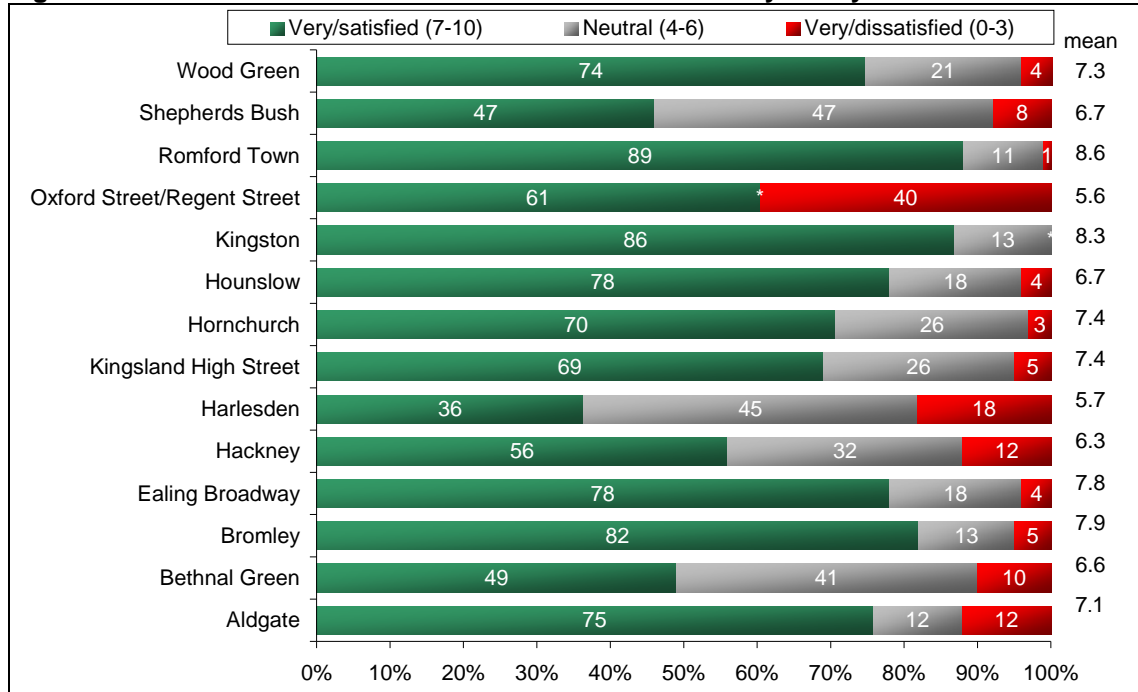
Weighted base: Aldgate 8, Bethnal Green 20, Bromley 81, Ealing Broadway 40, Hackney 16, Harlesden 34, Kingsland High Street 20, Hornchurch 115, Hounslow 41, Kingston 83, Oxford Street/Regent Street 5, Romford Town 100, Shepherds Bush 13, Wood Green 23
* = less than 0.5%

3.6 Attitudes to and Use of Bus

Summary

Over three quarters (76%) sometimes use the bus to travel in the area of the town centre.

Bus use increased slightly compared to twelve months ago. There was a 2% increase in those that travel by bus at least once a week (from 48% to 50%), and a 3% increase in those using buses at all (from 72% to 75%).

Bus customers were most positive about the ease of getting on and off the bus (mean score 7.98[9]) and the convenience of bus stops (7.71). Bus users were least satisfied with value for money (6.83) and the level of crowding on the bus (7.0).

There was strong agreement that there should be stricter bus lane enforcement (mean score 7.71), that bus stops are conveniently located (7.43) and for goods vehicles not to be allowed in bus lanes (6.97).

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

Frequency buses used to travel in town centre

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

Half the sample used bus in the area at least once a week. Just under a quarter (24%) said they never used the bus in the area.

Figure 16: Frequency of travel in the area by bus
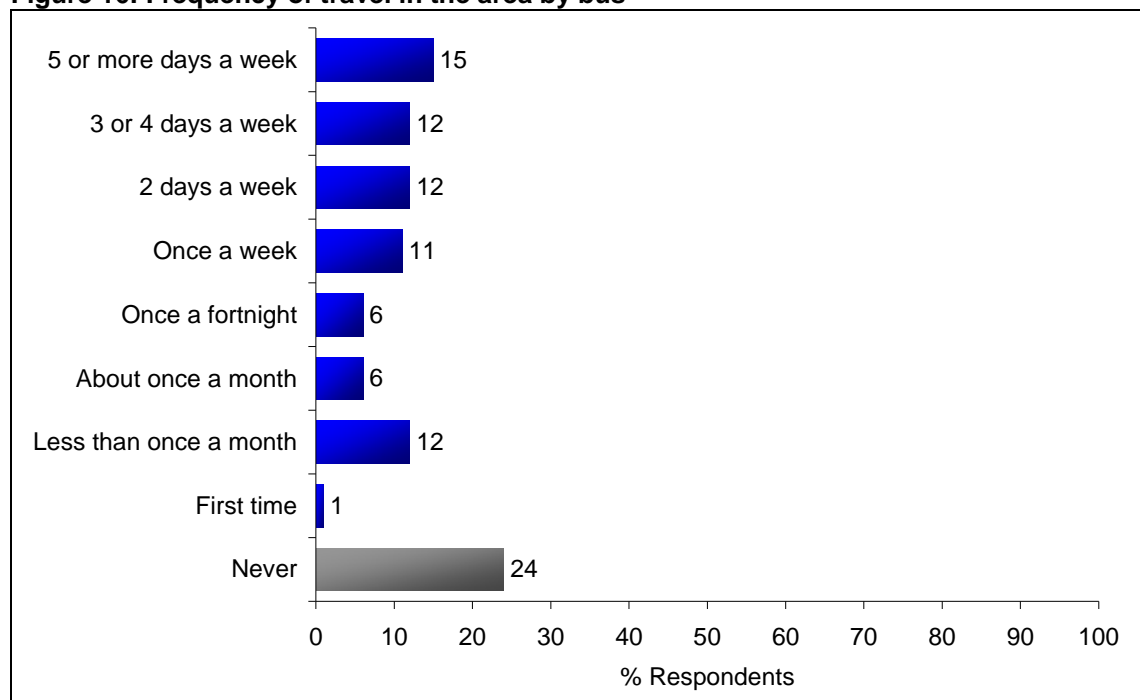
Weighted base: all respondents: 4,185

Frequency of using the bus was significantly different by type of town centre. Bus use was highest and most frequent in Inner London town centres: 82% sometimes used the bus and 61% used the bus at least once a week. Bus use was lowest and least frequent in Central London (60% sometimes used the bus, 28% used the bus at least once a week).

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

Legend: 5 or more days a week | 3 or 4 days a week | 2 days a week | Once a week | Once a fortnight | About once a month | Less than once a month | First time | Never

Outer London: 12 | 10 | 11 | 13 | 6 | 7 | 13 | 1 | 27
Inner London: 18 | 15 | 16 | 12 | 6 | 5 | 11 | 1 | 18
Central London: 12 | 6 | 5 | 5 | 3 | 8 | 18 | 3 | 40
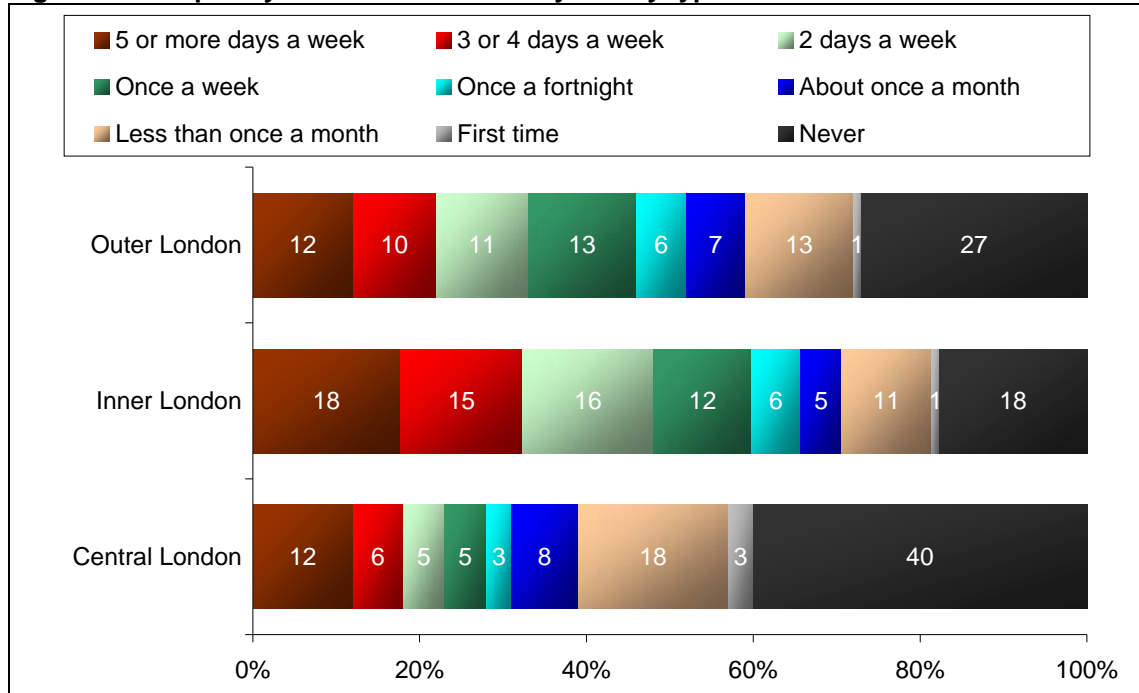
Weighted base: Central London 586; Inner London 2,084; Outer London 1,515

Bus use was highest in Harlesden with 90% sometimes using the bus to travel in the area. Bus use was also very high in Hackney, Wood Green, Bethnal Green and Kingsland High Street (from 89% to 81%).

Bus use was lowest in Oxford Street/Regent Street and Aldgate (from 54% and 65% respectively).

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

Legend: at least once a week | less than once a week | never

| Town centre	at least once a week	less than once a week	never
Harlesden	70	19	10
Wood Green	71	17	11
Hackney	68	20	11
Bethnal Green	56	28	16
Kingsland High Street	56	26	19
Hounslow	49	26	24
Shepherds Bush	50	23	26
Ealing Broadway	47	27	26
Bromley	45	28	28
Kingston	39	32	29
Romford Town	46	24	30
Hornchurch	49	22	30
Aldgate	39	26	35
Oxford Street/Regent Street	17	37	46

Weighted base: Aldgate 291, Bethnal Green 290, Bromley 304, Ealing Broadway 307, Hackney 300, Harlesden 299, Kingsland High Street 289, Hornchurch 308, Hounslow 306, Kingston 298, Oxford Street/Regent Street 296, Romford Town 300, Shepherds Bush 301, Wood Green 297

Those who travelled to the town centre by bus on the day of interview were the most frequent users of bus overall: 81% used bus at least once a week. Over half who accessed the town centre on foot (56%) also used the bus at least once a week. Car users were least likely to use the bus.

Figure 19: Frequency of using bus in town centre by mode used
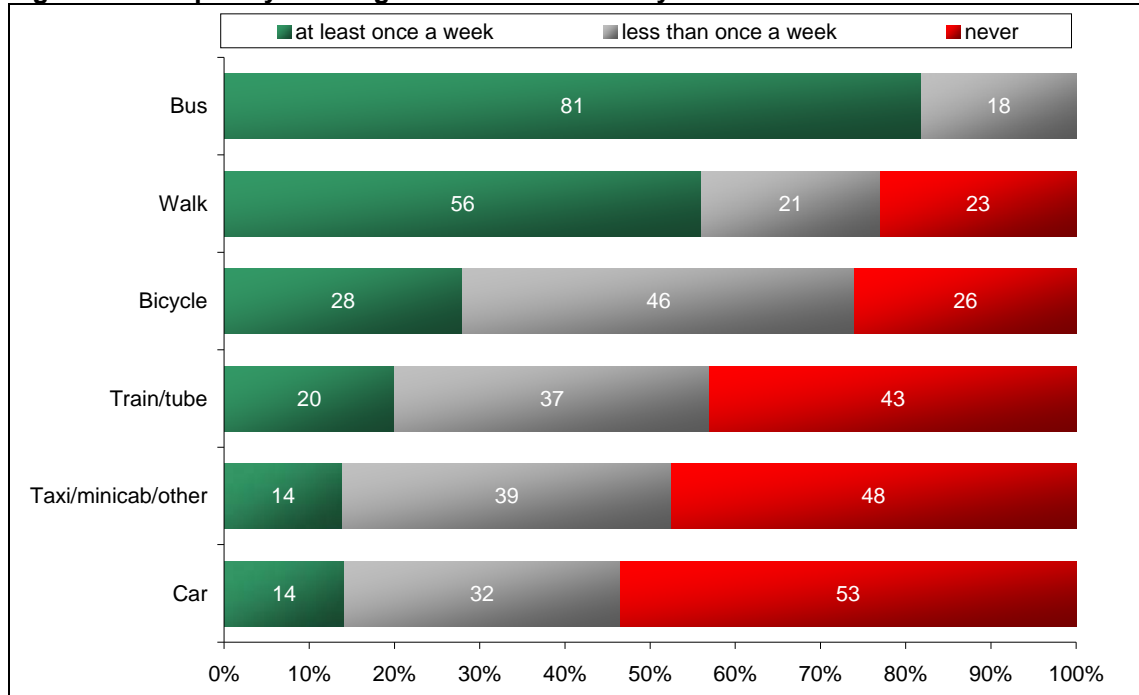
Weighted base: car 600, bus 1,420, train/Tube 926, bicycle 72, walk 1,126, taxi/minicab/other 41

Bus use increased slightly compared to the claimed frequency of use of twelve months ago as shown in Figure 20. There was a 2% increase in those that travel by bus at least once a week (from 48% to 50%), and a 3% increase in those using buses at all (from 72% to 75%).

Figure 20: Change in frequency of bus use in area
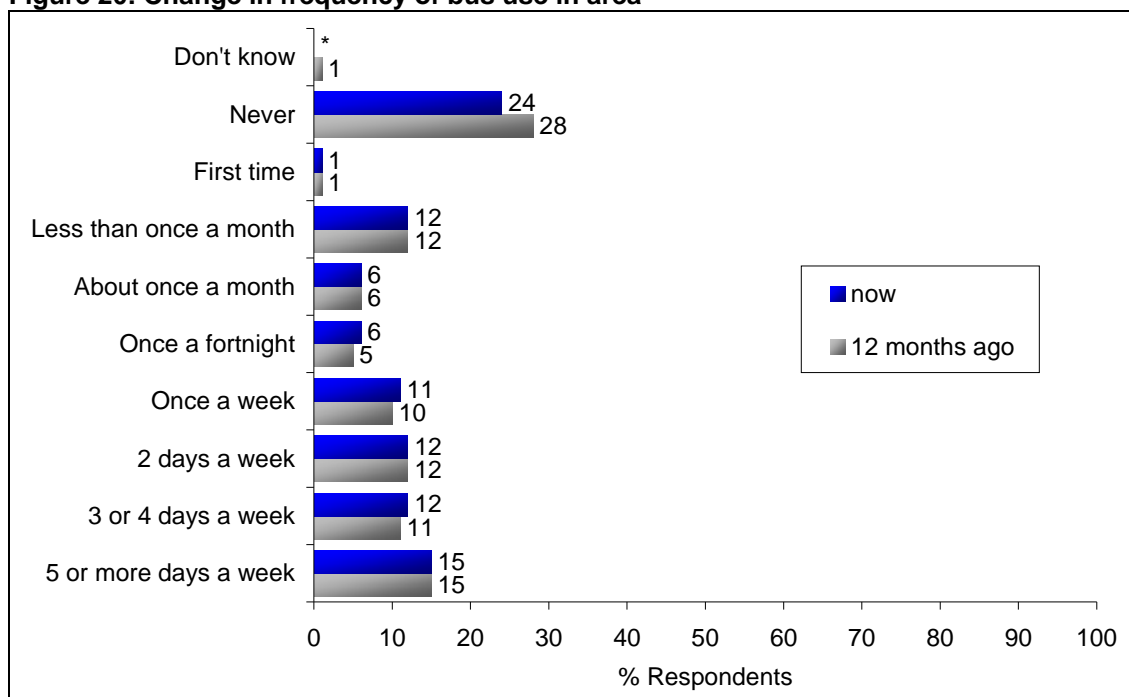
Weighted base: all respondents: 4,185
* = less than 0.5%

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

		Total	Central London	Inner London	Outer London
•	Weekly use				
	– Current	1.7	1.1	2.0	1.4
	– 12 months ago	1.6	1.0	2.0	1.4
•	Monthly use				
	– Current	6.6	4.3	8.0	5.7
	– 12 months ago	6.4	4.0	7.9	5.5

Bus users' satisfaction

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

- Length of time waited for the bus
- Comfort of journey
- Value for money
- Ease of getting on and off the bus
- Level of crowding on the bus
- Length of time the journey took
- Convenience of the bus stops
- Waiting facilities at the bus stop[10].

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[10] This aspect was added for the 2013 survey

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

Although generally positive about all the different aspects of travel by bus in the area, bus users were least satisfied with value for money (mean score 6.83 on a scale of 0 to 10 were 0 = very dissatisfied and 10 = very satisfied) and the level of crowding on the bus (mean score of 7). Bus customers were most positive about the ease of getting on and off the bus (mean score 7.98) and the convenience of bus stops also scored highly (mean score 7.71).

Figure 21: Satisfaction with aspects of bus travel in the area
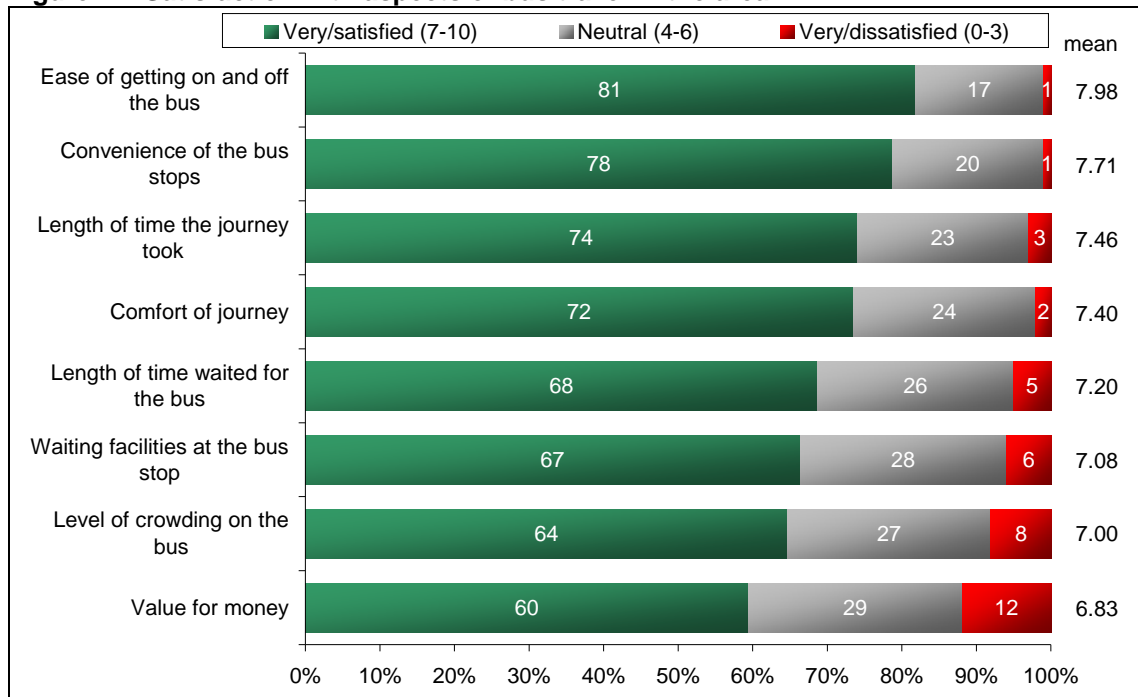
Base: 1,420 who travelled by bus

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

• Comfort of journey (8.01)
• Length of time waited for the bus (7.88)
• Length of time the journey took (7.88)
• Value for money (7.87).

Bus users in Oxford Street/Regent Street gave the highest score for 'ease of getting on and off the bus' (8.73) and second highest score for two other aspects.

Bus users in Romford and Ealing Broadway also gave high ratings for bus services.

Those in Harlesden were least satisfied, and gave the lowest ratings for all aspects.

Those in Hackney and Hornchurch also gave low scores.

Analysis by type of town centre shows that those in Outer London town centres have the highest satisfaction scores for all aspects except 'waiting facilities at the bus stop', 'level of crowding on the bus' and 'ease of getting on and off the bus' all of which bus users in Central London have highest satisfaction scores for.

Table 11: Summary of means scores for aspects of travel by bus in area by town centre

	Total	Central London	Inner London	Outer London
Ease of getting on and off the bus	7.98	8.31	7.70	8.26
Convenience of the bus stops	7.71	7.81	7.40	8.06
Length of time the journey took	7.46	7.25	7.25	7.76
Comfort of journey	7.40	7.61	7.21	7.61
Length of time waited for the bus	7.20	6.97	7.01	7.47
Waiting facilities at the bus stop	7.08	7.41	6.95	7.19
Level of crowding on the bus	7.00	7.39	6.84	7.14
Value for money	6.83	6.44	6.45	7.36

Mean scores calculated on a scale from 0 very dissatisfied to 10 very satisfied
Grey shading indicates highest score.

Comparison over time

The key changes are that 'value for money' for bus travel has gone down over time while comfort and level of crowding have gone up.

	2013	2011	2009	2004
Ease of getting on and off the bus	8.0	7.9	7.9	7.9
Convenience of the bus stops	7.7	7.7	7.8	7.8
Length of time the journey took	7.5	7.5	7.4	7.2
Comfort of journey	7.4	7.3	7.3	7.0
Length of time waited for the bus	7.2	7.3	7.4	6.7
Level of crowding on the bus	7.0	6.8	6.8	6.6
Value for money	6.8	6.9	7.3	7.4

Attitudes towards Bus Lanes and Bus Priority Measures

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

There was strong agreement that there should be stricter bus lane enforcement (mean score 7.71), that bus stops are conveniently located (7.43) and for goods vehicles not to be allowed in bus lanes (6.97).

There was also strong agreement that bus lanes are of benefit to cyclists (mean score 6.48).

There was least support for there being more bus lanes (mean score 5.80).

Figure 22: Agreement with statements about the area
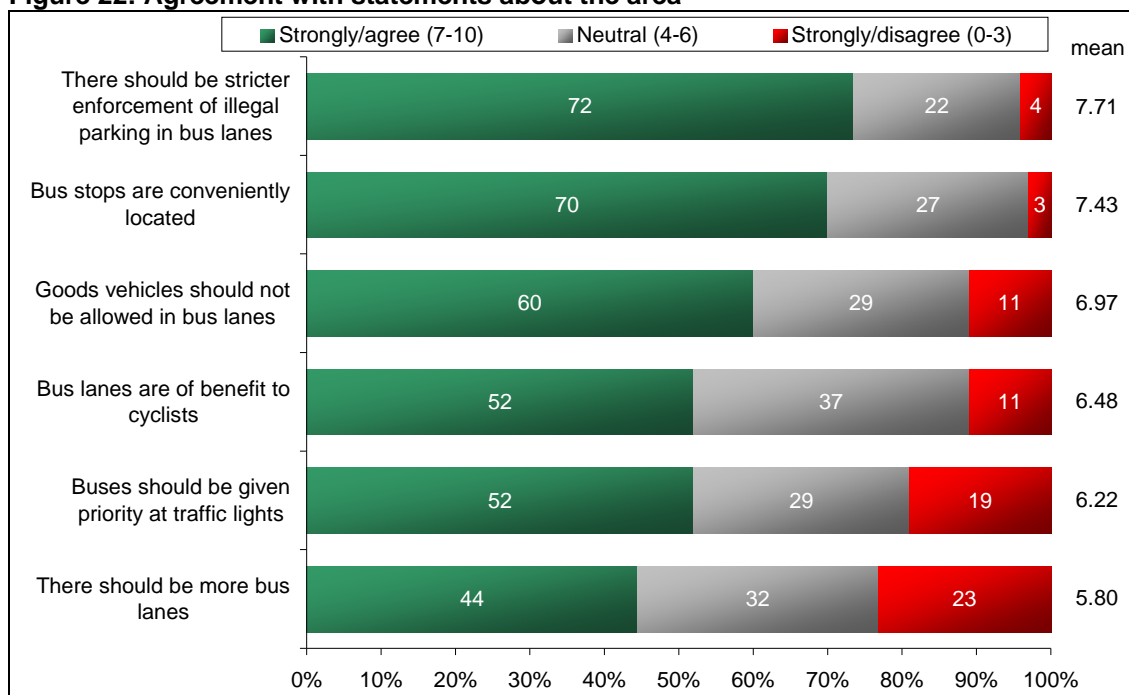
Weighted base: all respondents: 4,185

Overall, visitors to Central London town centres were more likely to be positive towards the measures and priorities, with the exceptions of agreeing that there should be stricter enforcement of illegal parking in bus lanes and that bus stops are conveniently located.

Table 12: Summary of mean scores for agreement with statements about the area by type of town centre

	Total	Central London	Inner London	Outer London
There should be stricter enforcement of illegal parking in bus lanes	7.71	7.98	7.41	8.01
Bus stops are conveniently located	7.43	7.57	7.24	7.64
Goods vehicles should not be allowed in bus lanes	6.97	7.36	6.79	7.05
Bus lanes are of benefit to cyclists	6.48	6.75	6.34	6.57
Buses should be given priority at traffic lights	6.22	6.53	6.16	6.19
There should be more bus lanes	5.80	6.14	5.86	5.59

Mean scores calculated on a scale from 0 very bad to 10 very good
Grey shading indicates highest score.

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

- There should be stricter enforcement of illegal parking in bus lanes:
  - Visitors to Hounslow (mean score of 8.16), Aldgate (8.10) and Ealing Broadway (8.02) were most likely to agree and visitors to Hackney, Hornchurch and Harlesden least likely to agree (7.02).
  - Cyclists were most likely to agree (7.96) and car users least likely to agree (7.39).

- Goods vehicles should not be allowed in bus lanes:
  - Visitors to Aldgate (7.48) and Shepherds Bush (7.46) were most likely to agree and visitors to Harlesden least likely to agree (6.10).
  - Cyclists were most likely to agree (7.69) and car users least likely to agree (6.42).

- Bus lanes are of benefit to cyclists:
  - Visitors to Ealing Broadway (6.91) and Oxford Street/Regent Street (6.81) were most likely to agree and visitors to Hornchurch least likely to agree (5.7).
  - Cyclists were most likely to agree (8.09) and car users least likely to agree (6.20).

- Buses should be given priority at traffic lights:
  - Visitors to Kingsland High Street (6.87) and Ealing Broadway (6.80) were most likely to agree and visitors to Hornchurch least likely to agree (5.29).
  - Cyclists were most likely to agree (6.92) and car users least likely to agree (5.06)

- There should be more bus lanes:
  - Visitors to Aldgate (6.52) and Kingsland High Street (6.51) were most likely to agree and visitors to Hornchurch least likely to agree (4.71).
  - Cyclists were most likely to agree (6.51) and car users least likely to agree (4.64).

- Bus stops are conveniently located:
  - Visitors to Ealing Broadway (6.91) and Kingsland High Street (7.85) were most likely to agree and visitors to Hornchurch least likely to agree (4.71).
  - Cyclists were most likely to agree (7.69) and users of taxis/minicabs or other modes were least likely to agree (4.40).

Comparison over time

There has been an increase in agreement on most statements regarding bus lanes and bus priority measures since 2011

Net agreement	2013	2011	2009
There should be stricter enforcement of illegal parking in bus lanes	72%	67%	69%
Bus stops are conveniently located	70%	69%	70%
Goods vehicles should not be allowed in bus lanes	60%	48%	57%
Bus lanes are of benefit to cyclists	52%	45%	53%
Buses should be given priority at traffic lights	52%	54%	42%
There should be more bus lanes	44%	45%	39%

Encouraging More Bus Use

Almost half (49%) mentioned some improvements that could encourage (greater) bus use. Making buses more regular (19%), faster journeys (15%), lower fares (15%), more reliable buses (14%) and more direct bus routes (13%) were the most frequently suggested ways in which bus use could be encouraged as shown in Table 13 below. 2.7 improvements were mentioned on average by each respondent.

When asked for the main factor, the top three single factors that would encourage greater use of the bus were more regular/frequent buses (11%), lower fares (10%) and faster journeys (6%).

Table 13: Factors that would encourage use of buses more often

	All respondents	
	All mentions %	Main factor %
Nothing	51	51
More regular/frequent buses	19	11
Faster journey	15	6
Lower fares	15	10
More reliable buses	14	4
Direct bus route	13	5
More seats on buses/less crowded buses	6	1
Cleaner buses	6	1
More comfortable journey	5	1
More shelters at bus stops	5	1
More information about buses	5	1
Reduce number of cars on the road/less congestion	4	1
Greater priority given to buses	3	*
Stricter enforcement of illegal parking in bus lanes	3	*
More seating at bus stops	3	*
Safer buses	3	*
Make children behave/school buses	3	1
Greener buses	3	*
Bus stop nearer home/destination	2	1
Improved ease of getting on and off buses	1	*
Other	2	2
Weighted base	**4,185**	**4,185**

* = less than 0.5%

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

Table 14: Main factors that would encourage use of buses more often by type of centre

	Total %	Central London %	Inner London %	Outer London %
Nothing	51	51	44	62
More regular/frequent buses	11	9	13	7
Lower fares	10	6	12	9
Faster journey	6	12	7	4
Direct bus route	5	6	4	5
More reliable buses	4	3	5	3
Weighted base	**4,185**	**586**	**2,084**	**1,515**

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

Over six tenths in Romford (66%), Ealing Broadway (64%), Bromley (62%) and Hounslow (61%) said nothing would encourage them to use buses more. By contrast 68% in Hackney, 65% in Harlesden and 61% in Wood Green mentioned aspects that would encourage more bus use.

In Oxford Street/Regent Street and Aldgate 'faster journey' was the most important aspect with 15% and 10% respectively mentioning this.

In Harlesden, Kingston, Shepherds Bush and Wood Green 'more regular/frequent buses' was the most often mentioned aspect that would encourage more bus use.

In Bethnal Green, Bromley, Hackney, Kingsland High Street, Hornchurch and Hounslow 'lower fares' was the most often mentioned aspect that would encourage more bus use.

3.7   Encouraging Cycling

Summary

In total, 4% cycled to the town centre or sometimes cycle to the area of the town centre.

Over two thirds (71%) said nothing would encourage them to cycle. The three main improvements which would encourage more cycling were 'more dedicated cycle paths' (13%), 'more cycle lanes on the roads' (13%) and 'less road traffic' (12%).

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

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

Over a quarter (29%) of town centre visitors mentioned at least one thing that might encourage them to cycle more often in the area.

The three main improvements were 'more dedicated cycle paths' (13%), 'more cycle lanes on the roads' (13%) and 'less road traffic' (12%).

Over three quarters of visitors to Romford (80%), Wood Green (78%) and Hornchurch (77%) said nothing would encourage them to cycle. Visitors to the following town centres were most likely to mention one or more things that would encourage them to cycle: Ealing Broadway (36%), Kingsland High Street (35%), Bethnal Green (35%) and Shepherds Bush (34%).

'(More) dedicated cycle paths' and 'less road traffic' were mentioned most in Hackney (23% and 19% respectively). '(More) cycle lanes on the roads' was mentioned most in Kingsland High Street (20%). Bicycle hire scheme was mentioned most in Harlesden (10%).

Figure 23: Things which would encourage cycling more often in this area
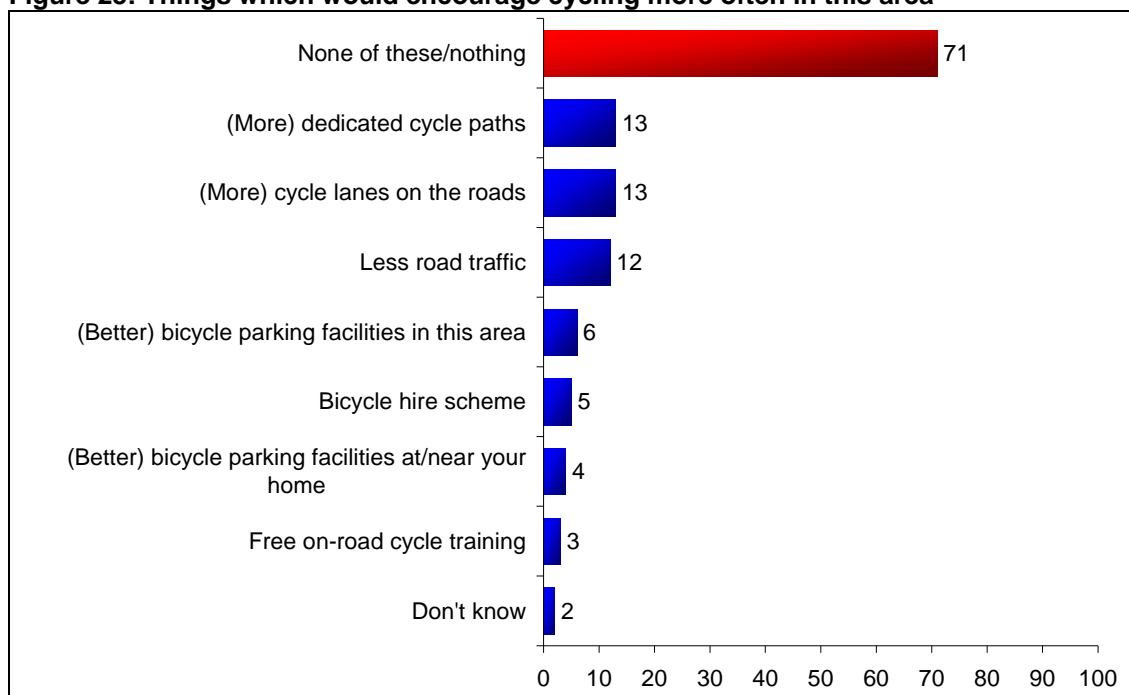
Weighted base: all respondents: 4,158

Cyclists were much more likely than users of other modes to mention something which would encourage cycling. They particularly mentioned '(more) cycle lanes on the roads' (48%), '(more) dedicated cycle paths' (45%), 'less road traffic' (27%) and better parking facilities in the area (20%).

Table 15: Things which would encourage cycling more often in this area by mode used

	Car %	Bus %	Train/ Tube %	Bicycle %	Walk %
None of these/nothing	75	74	74	26	64
(More) cycle lanes on the roads	10	11	13	48	17
(More) dedicated cycle paths	12	11	12	45	17
Less road traffic	8	11	11	27	16
(Better) bicycle parking facilities in this area	3	5	3	20	8
Bicycle hire scheme	4	5	3	5	8
(Better) bicycle parking facilities at/near your home	2	4	2	9	6
Free on-road cycle training	2	3	2	5	5
Don't know	1	2	2	1	2
Weighted base	**600**	**1,420**	**926**	**72**	**1,126**

3.8 Attitudes towards Town Centres

Summary

The main ways that the town centres could be improved were better range of shops (32%), to make the streets cleaner (27%) and improving shops/better quality shops (21%). 18% said nothing could be done.

67% of town centre visitors felt very safe and 29% felt fairly safe during the day. Of those who went out in the town centre after dark, only 30% said they felt very safe and 42% fairly safe.

A negative balance of 10% of visitors had seen fewer uniformed police officers in the local neighbourhood in the past year: 14% more, 24% less.

Improvements to Town Centre

Visitors were asked in what way the area could be improved. The suggestions most often mentioned were 'better range of shops' (mentioned by 32%) and to make the streets cleaner, mentioned by 27% of respondents. 'Improve shops/better quality shops' was also widely mentioned (21%).

Eighteen per cent of respondents thought that there was nothing that could be done to improve the centres, with an additional 3% not knowing what improvements there could be.

When asked what was the single most important improvement to be made, 'better range of shops', 'improve shops/better quality shops', 'cleaner streets' and 'remove undesirable element/more policing' were seen as the main priorities as shown in Table 16.

Table 16: Priorities for improvements to the area

	All respondents	
	All mentions %	Most important %
Nothing	18	-
Better range of shops	32	14
Cleaner streets	27	8
Improve shops/better quality shops	21	10
Less traffic	19	6
More pleasant/greener environment	18	6
Remove undesirable element/more policing	17	7
More leisure facilities	14	3
Reduce pollution	14	3
More public spaces	12	2
Longer shop opening hours	11	3
More shops	10	3
High street should be pedestrianised	9	2
Improve pedestrian environment	8	2
More/easier parking	8	3
Better bus service	7	2
Improve cycle facilities	5	1
Improve access to bus stop locations	3	*
Other	4	3
Don't know	3	3
Weighted base	**4,185**	**3,442**

* = less than 0.5%

The improvements can be grouped into the following categories:

	Mentions %	Most important %
Shopping facilities[11]	74	30
Environment[12]	65	19
Travel and transport[13]	64	17
Other[14]	31	10

For Central London the highest priority was in reducing traffic (13%). Also important in Central London was 'cleaner streets', 'more shops' and 'better range of shops'.

In Inner and Outer London town centres the priorities were 'better range of shops', 'Improve shops / better quality shops', 'cleaner streets' and the removal of undesirable elements/more policing.

Table 17: Main priority for improvements in each area by type of centre

	Total %	Central London %	Inner London %	Outer London %
Better range of shops	14	7	17	12
Improve shops / better quality shops	10	4	12	9
Cleaner streets	8	8	8	8
Remove undesirable element/more policing	7	3	9	7
More pleasant/greener environment	6	5	8	5
Less traffic	6	13	7	3
More shops	3	8	2	2
Longer shop opening hours	3	2	2	5
More leisure facilities	3	2	4	3
Reduce pollution	3	5	3	1
More/easier parking	3	1	3	3
More public spaces	2	2	2	1
High street should be pedestrianised	2	4	2	1
Improve pedestrian environment	2	4	2	1
Better bus service	2	2	1	2
Weighted base	**4,185**	**586**	**2,084**	**1,515**

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

The town centres with the most saying there were no improvements that could be made were Kingston (39% said 'nothing'), Romford (32%), Oxford Street/Regent Street (31%), Bromley (28%). By contrast the town centres with fewest saying there were no improvements that could be made were Harlesden (5%), Hornchurch (6%), hackney and Bethnal Green (7% each) and Kingsland High Street (8%).

The main improvement at six town centres (Bethnal Green, Ealing, Hackney, Hornchurch, Hounslow, Wood Green) was a 'better range of shops'.

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[11] Better range of shops, Improve shops/better quality shops, Longer shop opening hours, More shops

[12] Cleaner streets, More pleasant/greener environment, Improve pedestrian environment, More public spaces

[13] Less traffic, Reduce pollution, More/easier parking, Better bus service, Improve cycle facilities, Improve access to bus stop locations, High street should be pedestrianised

[14] More leisure facilities, Remove undesirable element/more policing

At Romford, Shepherds Bush and Kingsland High Street the main improvement was 'cleaner streets'.

At Kingston and Bromley the main improvement was 'Improve shops / better quality shops'.

Oxford Street/Regent Street the main improvement was 'less traffic'; at Kingston it was 'longer shop opening hours'; at Harlesden it was 'remove undesirable element/more policing', at Aldgate it was 'more shops' and at Kingston it was 'More pleasant/greener environment'.

The main priorities in each of the town centres are shown in Table 78 in Appendix B.

Safety

The perceived safety of the town centre neighbourhood in day time and at night was explored. Overall, 67% of town centre visitors felt very safe and 29% felt fairly safe during the day.

Just under a fifth (19%) didn't go out during the evening/after dark in the town centre neighbourhood. Of those who did, the feeling of safety fell markedly with only 30% saying they felt very safe and 42% fairly safe.

Figure 24: Feeling of safety in neighbourhood during the day
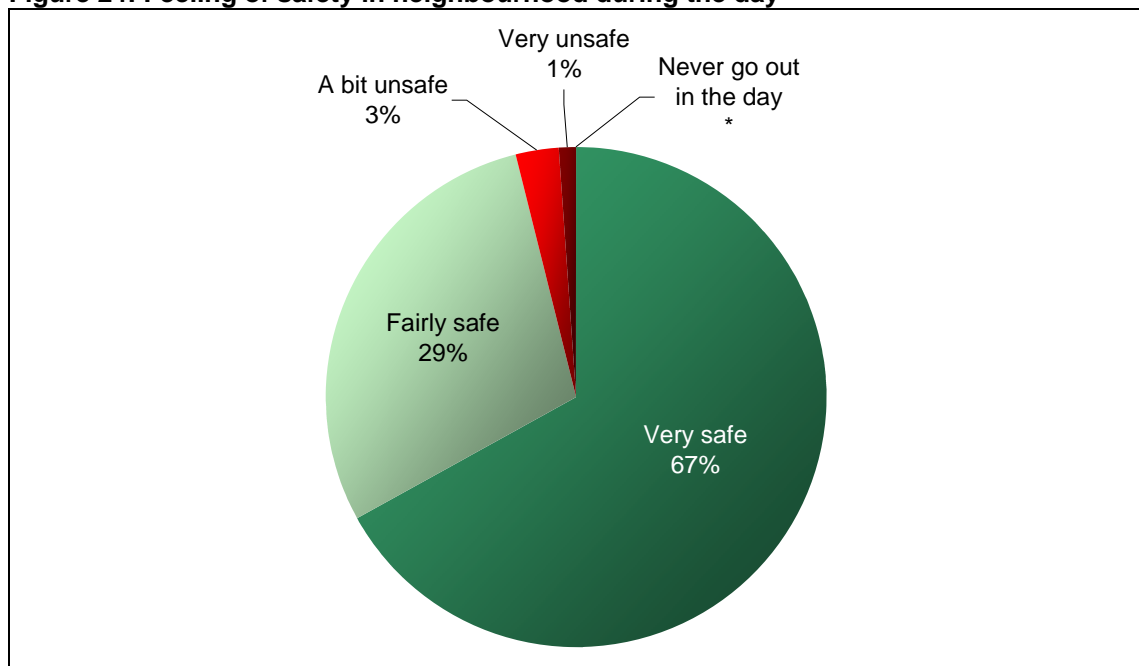
Weighted base: all respondents 4,745

Figure 25: Feeling of safety in neighbourhood during the evening/after dark
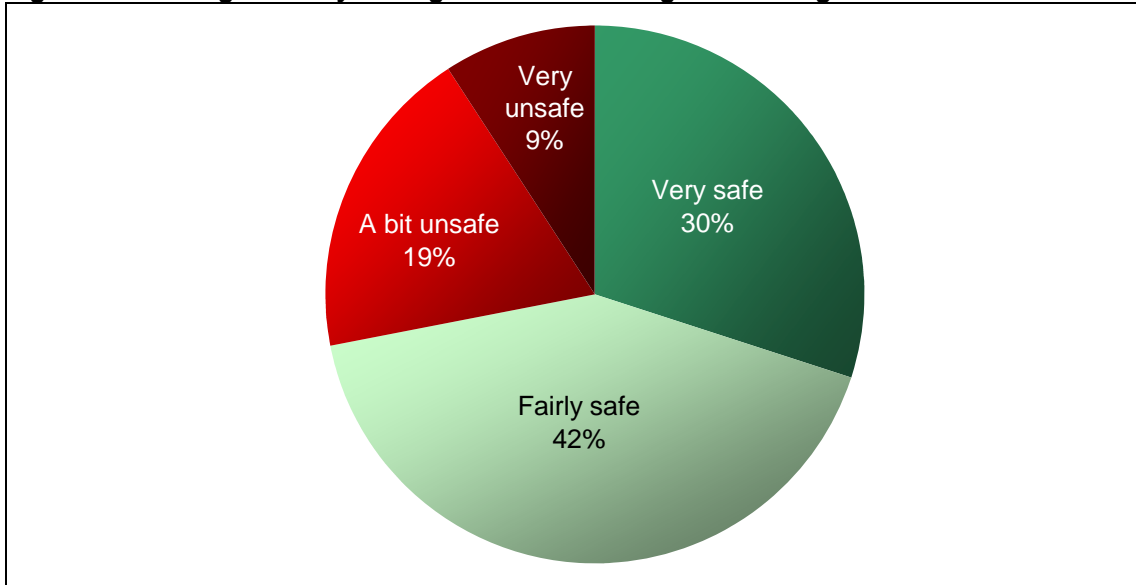
Weighted base: those who went out in the evening/after dark: 3,398

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

Table 18: Feeling of safety in neighbourhood in day time and in evening/after dark by type of centre

	day time			evening/after dark[0]		
	Central London %	Inner London %	Outer London %	Central London %	Inner London %	Outer London %
Very safe	78	59	73	39	27	31
Fairly safe	20	36	23	44	43	39
A bit unsafe	1	3	3	14	21	18
Very unsafe	*	1	1	3	9	12
Weighted base	**585**	**2,082**	**1,515**	**495**	**1,757**	**1,147**

* = less than 0.5%

[0] those who went out in the evening/after dark

The town centres with the highest proportions feeling unsafe in the day time are Hounslow (11% a bit unsafe/very unsafe), Kingsland High Street (9%), Harlesden (7%) and Bethnal Green (6%).

A negative balance of 10% of visitors had seen fewer uniformed police officers in the local neighbourhood in the past year: 14% more, 24% less.

Figure 26: Whether seen more or less uniformed police officers in local neighbourhood in past year
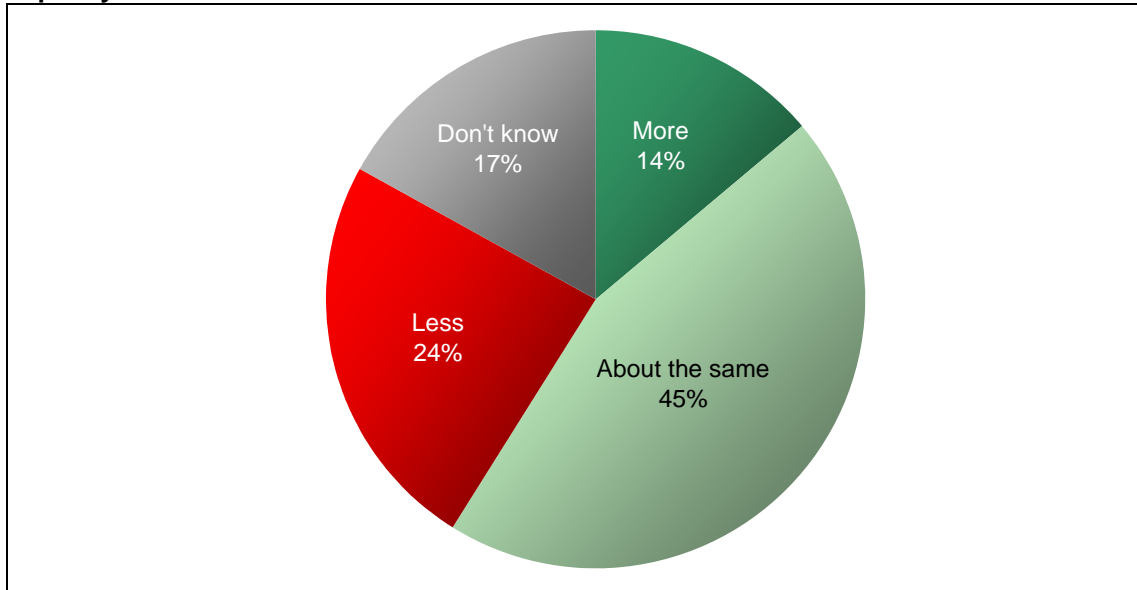
Weighted base: all respondents 4,185

In Inner London a balance of -22 had seen **fewer** uniformed police officers in the local neighbourhood compared to -5% for Central London and -2% for Outer London town centres.

The town centres with a balance of those who had seen **more** uniformed police officers in the local neighbourhood in the past year were Bromley (+9%)and Kingsland High Street (+6%).

The town centres with the highest balance of those who had seen **fewer** uniformed police officers in the local neighbourhood in the past year were Harlesden (-33%), Bethnal Green (-25%), Hackney (-25%) and Hornchurch (-22%).

Over two thirds (71%) of cyclists felt very or fairly safe when cycling in the town centre neighbourhood. Seven per cent felt very unsafe.

Figure 27: Feeling of safety when cycling in neighbourhood
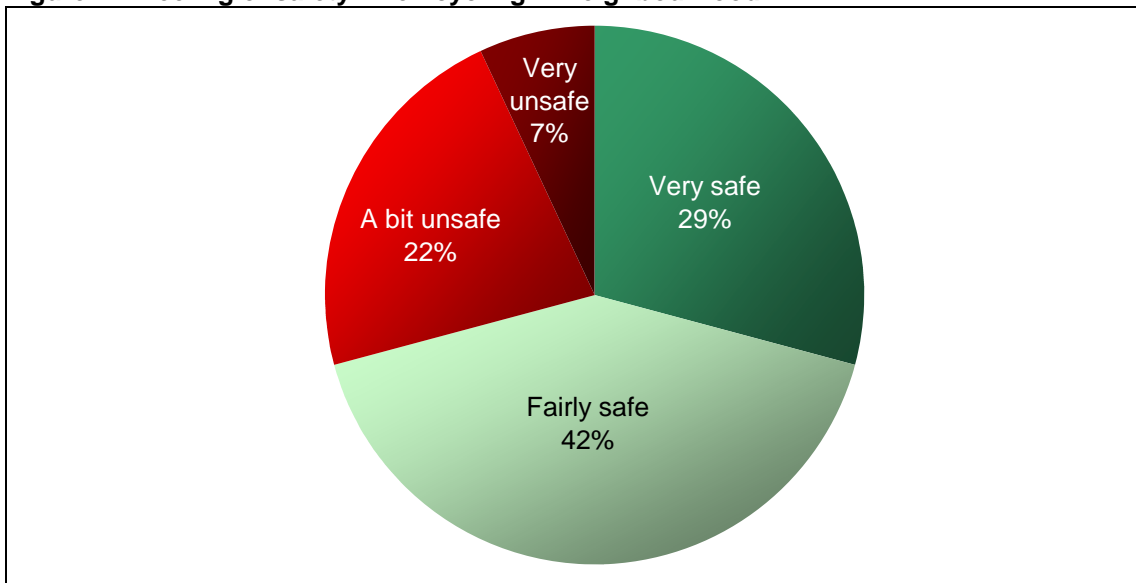
Weighted base: 169 cyclists

3.9 Use of Other Shopping Centres

Summary

Seven tenths of town centre visitors go to other shopping centres in and around London. The most visited shopping centres were Westfield Stratford (34%) and Westfield White City (30%).

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

Over two thirds of town centre visitors (70%) go to other shopping centres in and around London. The most visited other shopping centres[15] were Westfield Stratford (34%) and Westfield White City (30%).

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[15] From a list shown to respondents

Figure 28: Whether go to shopping centres in and around London
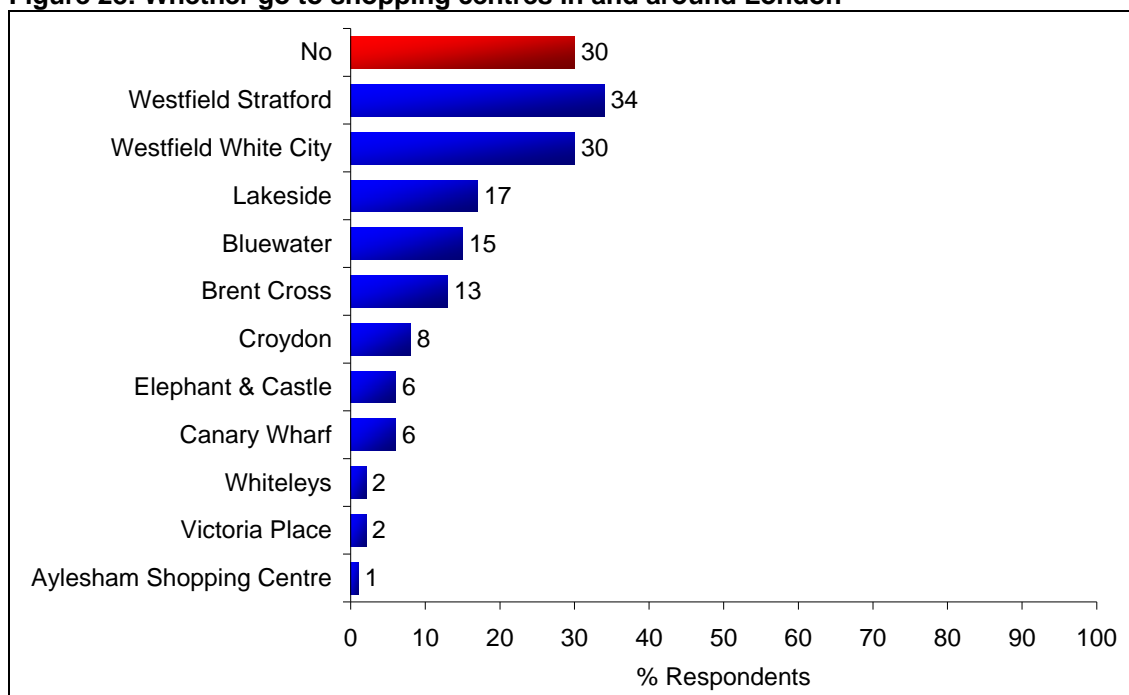
Weighted base: all respondents: 4,185

Visitors to Central and Inner London town centres were about twice as likely to visit Westfield Stratford than those from Outer London town centres.

Table 19: Whether go to shopping centres in and around London by type of centre

	Central London %	Inner London %	Outer London %
No	31	24	38
Westfield Stratford	40	41	21
Westfield White City	27	31	29
Lakeside	13	19	16
Bluewater	16	13	18
Brent Cross	8	18	7
Croydon	8	6	10
Canary Wharf	6	8	4
Elephant & Castle	7	8	2
Victoria Place	3	3	1
Whiteleys	2	3	1
Aylesham Shopping Centre	*	1	*
Weighted base	**586**	**2,083**	**1,515**

* = less than 0.5%

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

        Visit other shopping centres
- Car   75%
- Train/Tube   72%
- Bus   71%
- Walk   67%
- Bicycle   50%.

The specific other shopping centres visited were very much a function of the location of the town centre. For example, 73% at Hackney and 65% at Bethnal Green visited Westfield Stratford, 70% at Shepherd Bush and 56% at Ealing Broadway visited Westfield White City, 80% at Hornchurch visited Lakeside and 53% at Bromley visited Bluewater.

3.10 Oxford Street/Regent Street

Summary

Oxford Street is visited because of its shopping facilities: 36% considered it to be the best shopping area, 20% were visiting a particular shop and 18% cited 'more/better/ bigger range of shops'.

29% of visitors to Oxford Street/Regent Street were aware of the changes to travel around Tottenham Court Road.

Of those who were aware 43% knew it was because of building rail/Crossrail station.

39% had used the diagonal crossing at Oxford Circus and there were very high levels of satisfaction with both the safety and ease of crossing the road on the diagonal crossing.

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

Why visit Oxford Street

The main reason why respondents at Oxford Street were visiting Oxford Street rather than going somewhere else was because of its shopping facilities: it was considered to be the best shopping area by 36%, 20% were visiting a particular shop and 18% cited 'more / better / bigger range of shops'.

The main non shopping reasons mentioned were working near Oxford Street (15%) and a day out/trip into town (13%).

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

Reason	Value
Oxford Street is best shopping area	36
Visiting a particular shop	20
More/better/bigger range of shops	18
Work near here	15
As a 'day out'/'trip into town'	13
Meeting people here	11
Visiting other places in London as well	7
Had to be in central London for other reason	6
Easy for me to travel to and from	5
To do something different/special	5
Easy for other people to travel to and from	4
More leisure facilities, eg restaurants, bars, cinemas etc	4
Visiting a particular leisure facility	4
Longer shop opening hours	4
No particular reason	3
Good public transport	3
Live near here	2
Other	5

Base: 295 visitors to Oxford Street/Regent Street

Awareness of changes to travel around Tottenham Court Road

Under a third (29%) of visitors to Oxford Street/Regent Street were aware of the changes to travel around Tottenham Court Road. This is less than the 36% aware in 2011.

Respondents who lived or worked within ten minutes of Oxford Street were much more likely to be aware than those who didn't: 56% compared to 22%.

Awareness for reasons for diversions and travel changes

Of those who were aware of the changes to travel around Tottenham Court Road 43% knew it was because of building rail/Crossrail station (13% of all visitors to Oxford Street).

Other reasons mentioned included:

- Building works (unspecified)   20%
- Transport works (unspecified)   20%
- Improving Underground station   16%
- Improving road layout/better roads   12%
- Utility works (eg electricity, gas, water)   9%
- Improving bus facilities/bus routes   8%
- Improving cycle facilities   5%
- Improving pavements/pedestrian facilities   5%
- New shops/shopping centre development   4%

Eight per cent said they didn't know.

Diagonal Crossing

Over a third of the visitors (39%) to Oxford Street/Regent Street had used the diagonal crossing at Oxford Circus.

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

Figure 30: Satisfaction with ease and safety of crossing
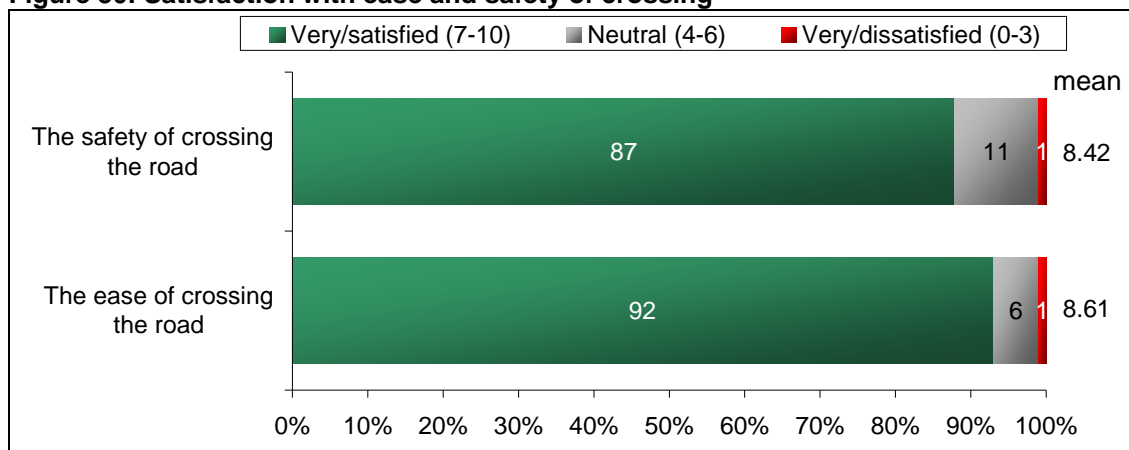
Base: 115 visitors to Oxford Street/Regent Street who used diagonal crossing
Mean scores based on 0 = very dissatisfied and 10 = very satisfied

Men and respondents aged 25-44 gave lower satisfaction scores than women and respondents aged under 24 or over 44 years old:

	16-24	25-44	45-60	60+	Male	Female
• ease of crossing the road	8.9	8.3	8.8	9.6	8.4	8.7
• safety of crossing the road	8.8	8.1	8.7	9.5	8.0	8.7
Base	15	66	25	8	43	71

3.11 Shopping and Expenditure in the Area

Summary

Almost half (45%) were shopping for groceries and food, 29% were shopping for clothes or footwear, 19% were using a service and 16% were eating out.

Those in Inner and Outer London town centres were most likely to be shopping for food and groceries (56% and 42% respectively) whereas those in Central London were most likely to be buying a take-away (30%) or eating out in a café or restaurant (25%).

A wide range of services and shops were visited by respondents. Almost half of the visitors to the town centres were shopping for groceries and food (45%) and 29% were shopping for clothes or footwear as shown in Figure 31.

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

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

- Services (eg hairdressers)   19%
- Café or restaurant   16%
- Take away food   15%
- Pharmaceuticals/toiletries   10%.

Figure 31: Range of things shopped for and services used
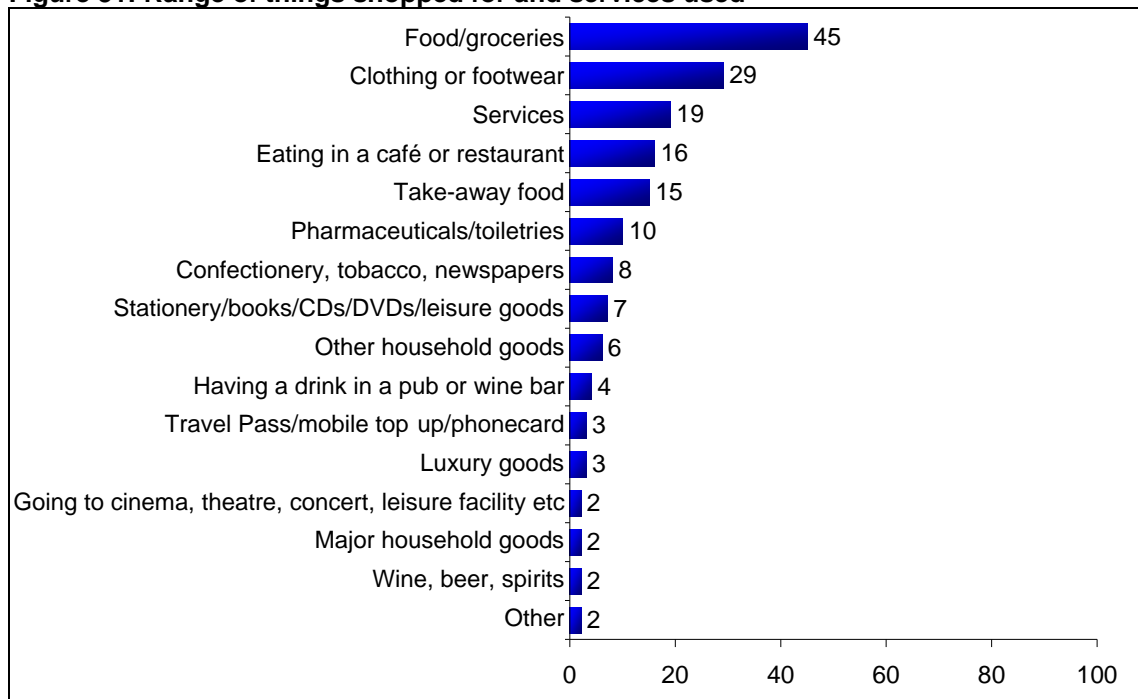
Weighted base: 4,171

Those in Inner and Outer London town centres were most likely to be shopping for food and groceries (56% and 42% respectively) whereas than those in Central London were most likely to be shopping for clothing or footwear (39%).

Eating out in a café or restaurant and buying a take-away was much higher in Central London than in Inner and Outer London town centres: 25% eating out compared to between 13% and 17% and 30% take away compared to between 12% and 14%.

Use of services was higher in Inner and Outer London town centres than in Central London: 18-20% compared to 16%.

Table 20: Range of shopping and services by type of centre

	Total %	Central London %	Inner London %	Outer London %
Food/groceries	45	15	56	42
Clothing or footwear	29	39	19	39
Services	19	16	20	18
Eating in a café or restaurant	16	25	13	17
Take-away food	15	30	14	12
Pharmaceuticals/toiletries	10	9	10	11
Confectionery, tobacco, newspapers	8	8	8	8
Stationery/books/CDs/DVDs/leisure goods	7	6	4	11
Other household goods	6	2	6	9
Having a drink in a pub or wine bar	4	9	3	3
Luxury goods	3	6	2	4
Travel Pass/mobile top up/phonecard	3	3	3	2
Wine, beer, spirits	2	1	3	2
Major household goods	2	1	3	1
Going to cinema, theatre, concert, leisure facility etc	2	3	2	2
Other	2	3	1	2
Weighted base	**4,171**	**572**	**2,084**	**1,515**

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

Food/grocery shopping was most mentioned at nine of the fourteen town centres (Bethnal Green, Ealing Broadway, Hackney, Harlesden, Kingsland High Street, Hornchurch, Hounslow, Shepherds Bush and Wood Green) and least mentioned at Oxford Street.

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

Take away food was most mentioned at Aldgate.

Analysis by town centre categories used in the London Plan is shown in Table 21. This shows that food/grocery shopping was most mentioned at District and Major town centres (64% and 52% respectively) and least mentioned at International town centres (9%).

Clothing or footwear shopping was most mentioned at International town centres (73%) and least mentioned at District town centres (8%).

Table 21: Range of shopping and services by London Plan town centre category

	Inter-national %	Metro-politan %	Major %	District %	Unclassif-ied %
Food/groceries	9	43	52	64	21
Clothing or footwear	73	36	24	8	6
Services	10	18	22	20	22
Eating in a café or restaurant	33	16	12	12	18
Take-away food	15	13	17	11	44
Pharmaceuticals/toiletries	10	9	9	13	9
Confectionery, tobacco, newspapers	5	7	7	9	10
Stationery/books/CDs/DVDs/leisure goods	11	9	4	4	1
Other household goods	3	8	5	7	0
Having a drink in a pub or wine bar	9	3	3	3	9
Luxury goods	12	4	1	1	1
Travel Pass/mobile top up/phonecard	3	2	3	3	4
Wine, beer, spirits	1	3	2	3	2
Major household goods	2	2	2	3	0
Going to cinema, theatre, concert, leisure facility etc	6	2	2	2	1
Other	2	2	2	2	4
Weighted base	**282**	**2,114**	**589**	**897**	**291**

3.12 Average Spend

Summary

The average spend was £37 on the day of interview which is similar to the usual spend per visit (£34). The average spend per week was £69. The average spend per month was £277.

Average spend per visit by mode was car £46, train/Tube £41, bus £32, walk £25 and cycle £22.

Average spend per week by mode was walk £86, bus £73, car £62, train/Tube £48 and cycle £48.

Average spend per month by mode was walk £346, bus £292, train/Tube £239, car £247 and cycle £190.

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

Overall the average spend was £37 on the day of interview which is similar to the usual spend per visit (£34). The average spend per week was £69 and the average spend per month was £277.

Table 22: Average spend

	Spend today %	Average spend per visit %	Average total spend per week* %	Average total spend per month* %
Nothing	5	2	2	2
Under £5	11	9	7	2
£5-£19.99	31	33	21	5
£20-£49.99	30	33	25	9
£50-£99.99	15	14	25	15
£100+	8	6	19	68
Mean	**£37**	**£34**	**£69**	**£277**
Base	**4,094**	**3,949**	**3,947**	**3,947**

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

Those who visit Inner London spend the most on average per week (£78) and month (£312) although they spend less per visit that those who visit Central London since they visit more often.

Table 23: Average spend today, per visit and per week by type of centre

	Central London				Inner London				Outer London			
	Spend today %	Average spend per visit %	Average total spend per week* %	Average total spend per month* %	Spend today %	Average spend per visit %	Average total spend per week* %	Average total spend per month* %	Spend today %	Average spend per visit %	Average total spend per week* %	Average total spend per month* %
Nothing	4	3	4	4	5	3	3	3	5	1	1	1
Under £5	14	16	11	4	10	7	6	2	10	9	8	1
£5 - £19.99	29	27	32	6	35	36	16	4	27	31	23	5
£20 - £49.99	17	17	25	12	33	37	25	7	30	34	27	11
£50 - £99.99	17	11	13	22	12	12	27	12	18	16	26	16
£100+	20	16	15	52	4	3	24	73	10	5	15	65
Mean	**£54**	**£40**	**£58**	**£232**	**£30**	**£29**	**£78**	**£312**	**£41**	**£35**	**£60**	**£242**
Base[1]	**567**	**516**	**518**	**518**	**2061**	**2019**	**2,019**	**2,019**	**1466**	**1409**	**1,411**	**1,411**

1. except refused and don't know

Oxford Street/Regent Street (£87), Romford (£48) and Kingston (£48) were the town centres with the highest levels of spend on the day of interview. Oxford Street/Regent Street and Kingston were also the locations with the highest levels of spend on average.

Visitors to Aldgate (£21) and Bethnal Green (£22) spent the least.

Those visiting Hornchurch spend the most on average per week and month (£98 and £391 respectively), with those visiting Wood Green (£92 and £368) and Harlesden (£87 and £350) also having high average weekly and monthly spends. Those visiting Bromley (£56 and £226) and Aldgate (£57 and £229) spent least on average.

Those in Oxford Street/Regent Street tend not to be such regular visitors to the area and this is reflected in the average spend per week and month (£59 and £238) and only below the average of £69 per week and £277 per month. This would indicate that places such as Hornchurch attract more locally based and regular shoppers for goods such as groceries and household goods whereas those in the West End visit more for luxury

goods such as clothes and footwear. The average spend by visitors at each centre is shown in Table 74, Table 75, Table 76 and Table 77 in Appendix B.

Spend by Mode

Those who travelled by car were also high spenders on the day of the interview (43% spent £50 or more). In comparison, only 19% of those who travelled by bus and 12% of those who walked to the centre spent £50 or more.

Those who travelled by bus spent an average of £33 on the day of interview. Those who travelled by car spent the most on average on the day of interview (£54) but those who travelled by train/Tube were also high spenders (£45 on average). Those who cycled and walked to the centre spent the least (£27). These figures are shown in Table 24.

Table 24: Average spend by mode on day

	Car %	Bus %	Train/Tube %	Bicycle %	Walked %	Taxi/ minicab/ other %
Nothing	4	5	5	12	5	3
Under £5	5	10	15	13	10	8
£5 - £19.99	20	28	31	33	42	13
£20 - £49.99	27	37	19	28	31	36
£50 - £99.99	27	14	16	10	8	23
£100+	16	5	14	4	4	18
Mean	**£54**	**£33**	**£45**	**£27**	**£27**	**£61**
Base[1]	**584**	**1,380**	**907**	**69**	**1,116**	**39**

1. except refused and don't know

A similar pattern was found in the average spend per visit, with 36% of car drivers/passengers spending an average of £50 or more per visit.

With respect to the overall average spend per visit, car drivers/passengers spent £46, train/Tube passengers £41, bus customers £32, those who walk £25 and those who cycle £22.

Table 25: Average spend by mode per visit

	Car %	Bus %	Train/Tube %	Bicycle %	Walked %	Taxi/ minicab/ other %
Nothing	2	2	4	6	1	*
Under £5	5	8	13	16	8	8
£5 - £19.99	20	31	31	41	44	18
£20 - £49.99	33	41	21	29	34	46
£50 - £99.99	28	12	13	9	9	15
£100+	8	4	11	1	2	5
Mean	**£46**	**£32**	**£41**	**£22**	**£25**	**£46**
Base[1]	**560**	**1353**	**845**	**70**	**1084**	**36**

* = less than 0.5%
1. except refused and don't know

If the frequency of visiting the area is taken into account, however, there is a more even distribution of spend by mode. The total average spend per week by mode (see Table 26) shows that those who walk to the area tend to spend most on average per week (£86

on average). Those travelling by bus spend the next most per week on average (£73) whereas those travelling to the area by cycle and train/Tube spend the least (£48).

The total average spend per month by mode (see Table 27) shows that average spend for those who walk to the area was £346, for bus it was £292, for car it was £247, for train/Tube it was £192 and for cycle it was £190.

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

Table 26: Average total spend per week by mode

	Car %	Bus %	Train/Tube %	Bicycle %	Walked %	Taxi/ minicab/ other %
Nothing	2	2	5	5	1	0
Under £5	8	7	14	12	2	19
£5 - £19.99	21	19	31	26	14	20
£20 - £49.99	27	24	26	21	26	22
£50 - £99.99	25	27	14	24	31	19
£100+	18	21	11	11	26	20
Mean	**£62**	**£73**	**£48**	**£48**	**£86**	**£57**
Base[1]	**560**	**1,355**	**843**	**70**	**1,084**	**35**

1. except refused and don't know

Table 27: Average total spend per month by mode

	Car %	Bus %	Train/Tube %	Bicycle %	Walked %	Taxi/ minicab/ other %
Nothing	2	2	5	5	1	0
Under £5	1	1	5	0	*	11
£5 - £19.99	5	5	8	12	1	5
£20 - £49.99	10	9	14	5	5	11
£50 - £99.99	16	13	21	24	10	17
£100+	66	70	48	54	82	56
Mean	**£247**	**£292**	**£192**	**£190**	**£346**	**£230**
Base[1]	**560**	**1,355**	**843**	**70**	**1,084**	**35**

* = less than 0.5%
1. except refused and don't know

It should be noted that visitors may use a number of different modes to access the area, for example car users may also travel to the town by bus on other occasions (for example, 37% of those who travelled by car also use the bus), but this calculation is based on the mode used on the day of interview.

Spend by London Plan Town Centre Category

Analysis by town centre categories used in the London Plan is shown in Table 28.

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

However, the average spend per week and month is more similar across town centre categories (between £59[16] and £84 per week and between £238 and £335 per month) as those in District and Major town centres visit more often than those at Metropolitan and International town centres.

Table 28: Average spend today, per visit, per week and per month by London Plan town centre category

Spend today	International %	Metropolitan %	Major %	District %	Unclassified %
Nothing	3	5	5	6	5
Under £5	5	10	10	9	24
£5 - £19.99	16	29	35	36	42
£20 - £49.99	14	30	36	33	19
£50 - £99.99	27	17	11	12	6
£100+	36	9	2	4	3
Mean	**£87**	**£39**	**£27**	**£28**	**£21**
Spend per visit					
Nothing	3	2	4	2	4
Under £5	4	8	8	6	29
£5 - £19.99	15	31	39	38	40
£20 - £49.99	15	35	36	37	18
£50 - £99.99	21	16	10	12	2
£100+	30	5	2	2	2
Mean	**£84**	**£34**	**£26**	**£28**	**£17**
Spend per week					
Nothing	3	2	4	2	4
Under £5	12	7	9	5	10
£5 - £19.99	34	21	16	15	30
£20 - £49.99	23	26	24	26	27
£50 - £99.99	14	26	26	28	13
£100+	14	17	21	26	15
Mean	**£59**	**£65**	**£71**	**£84**	**£57**
Spend per month					
Nothing	3	2	4	2	4
Under £5	7	2	2	0	2
£5 - £19.99	4	5	5	4	7
£20 - £49.99	17	10	6	6	8
£50 - £99.99	20	15	12	11	24
£100+	48	67	70	77	55
Mean	**£238**	**£261**	**£283**	**£335**	**£226**
Base[1]	**286**	**2,057**	**587**	**887**	**279**

1. except refused and don't know

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[16] Excluding 'unclassified'

As might be expected, the more time the visitor intended to spend in the area the more money they are likely to spend. For example, 40% of those spending between £5 and £20 were planning to be in the area for less than an hour whereas only 6% of those who were planning to spend £100 or more were going to be in the area for less than an hour.

Table 29: Average time spent in the town centre by amount spent on the day

		Amount spent on the day					
	Total %	Nothing %	Under £5 %	£5 - £19.99 %	£20 - £49.99 %	£50 - £99.99 %	£100+ %
Under 5 minutes	*	0	*	*	0	0	0
5-14 minutes	1	5	5	1	1	*	0
15-29 minutes	7	14	13	12	4	2	*
30-59 minutes	23	33	18	27	27	15	6
1-3 hours	45	34	26	35	52	63	58
More than 3 hours	23	15	38	25	16	19	36
Don't know	*	0	*	*	*	0	0
Base	**4,252**	**217**	**451**	**1,347**	**1,277**	**616**	**344**

* = less than 0.5%

Spend by Town Centre

The highest spend per visit was at Oxford Street/Regent Street, Kingston, Romford and Bromley and the lowest spend per visit was at Hackney, Bethnal Green and Aldgate.

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

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

average spend per visit		weekly frequency of visit	
Oxford Street/Regent Street	£84	Aldgate	3.9
Kingston	£40	Harlesden	3.4
Romford Town	£38	Bethnal Green	3.3
Bromley	£37	Kingsland High Street	3.3
Shepherds Bush	£36	Wood Green	3.2
Hornchurch	£35	Hackney	3.0
Wood Green	£33	Hornchurch	2.9
Hounslow	£32	Ealing Broadway	2.9
Harlesden	£29	Shepherds Bush	2.7
Ealing Broadway	£27	Hounslow	2.4
Kingsland High Street	£26	Kingston	2.4
Hackney	£25	Romford Town	2.3
Bethnal Green	£21	Bromley	2.3
Aldgate	£17	Oxford Street/Regent Street	1.4

3.13 Online Shopping

Summary

Just over half of town centre visitors (52%) shop by internet. Bus users and pedestrians least likely to shop by internet

The main goods purchased online are clothing/footwear (64%), books/CDs/DVDs/ leisure goods (60%) and tickets (46%).

Just under half of town centre visitors (47%) shop by internet compared to 47% in 2011. Visitors to Central London were most likely to shop by internet. See Figure 33.

Figure 33: Whether shop by internet
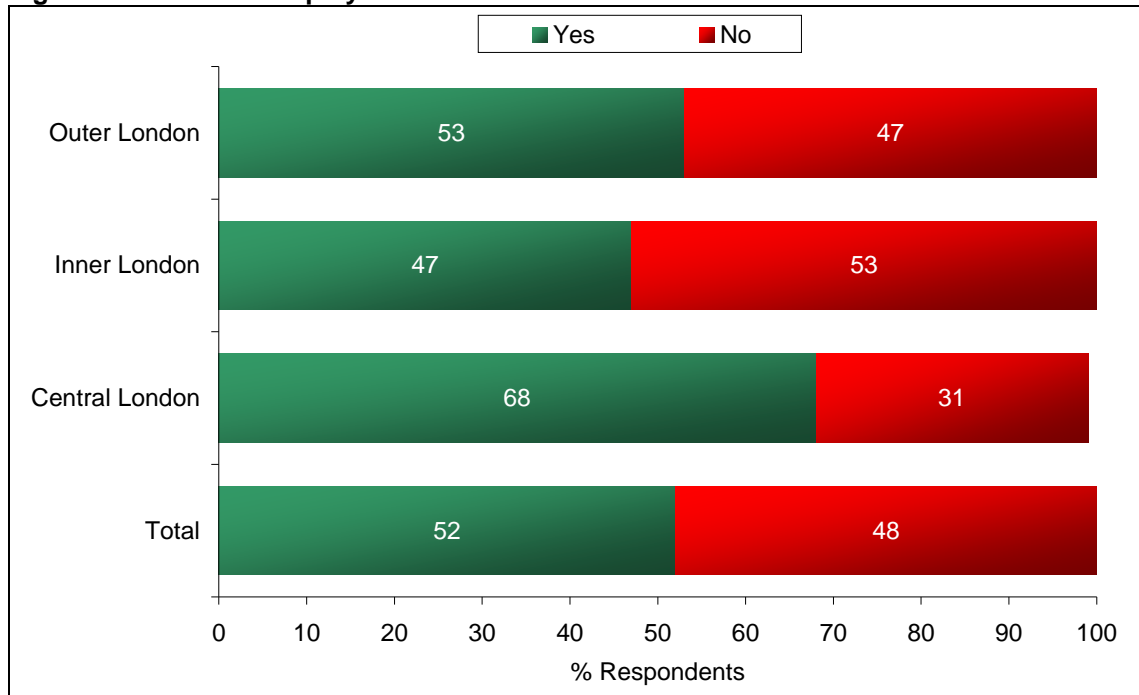
Weighted base: Total 4,185, Central London 586; Inner London 2,084; Outer London 1,515

Bus users and pedestrians were least likely to shop by internet.

- Bicycle   71%
- Train/Tube   67%
- Car   59%
- Walk   47%
- Bus   43%.

The highest levels of internet shopping were by visitors to Aldgate (69%), Oxford Street/Regent Street (68%) and Kingston (65%) and the lowest by visitors to Harlesden (41%), Hornchurch (42%) and Hounslow (42%). The proportion shopping by internet at the other centres ranged from 44% to 58%.

The main goods purchased online are clothing/footwear (64%), books/CDs/DVDs/ leisure goods (60%) and tickets (46%).

Figure 34: Goods shopped for online
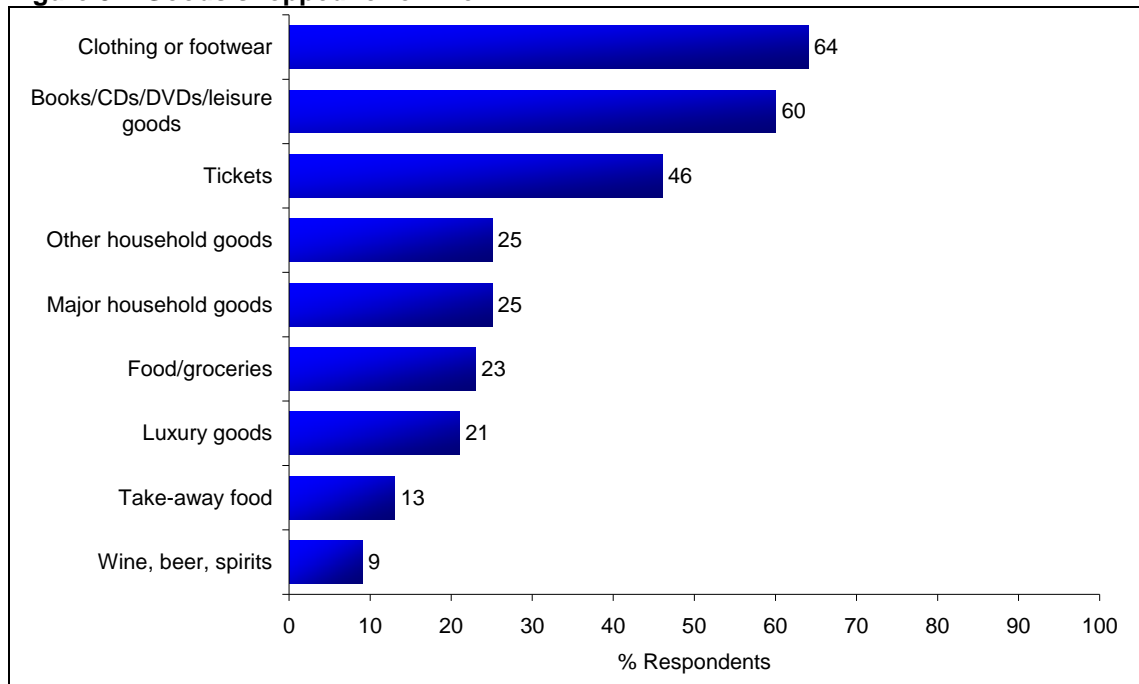
Weighted base: 2,173 who shop online

Figure 35 shows a comparison of the type of goods shopped for online and in town centres. Online predominates for books/CDs/DVDs/leisure goods, clothing/footwear, tickets, household goods and luxury goods. 'In town centres' predominates for food/groceries.

Figure 35: Comparison of goods shopped for online and in town centres
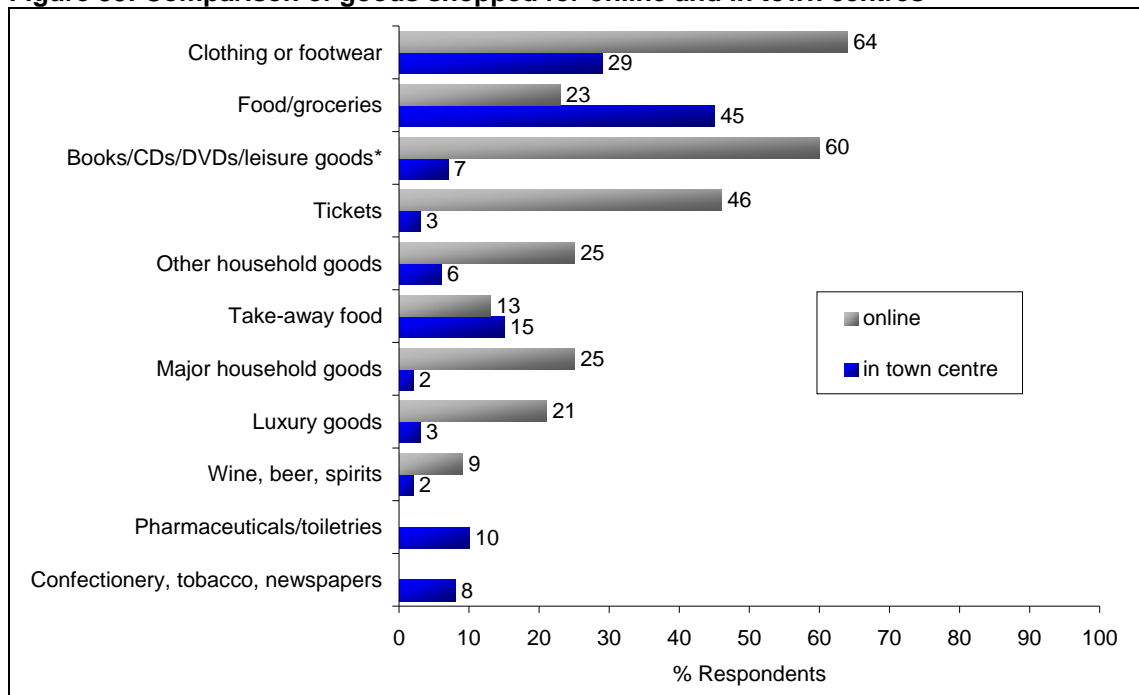
Weighted base: 2,173 who shop online and 4,171 who shop in town centres
* includes 'stationary' for shoppers in town centre
For online, 'confectionery, tobacco, newspapers' and 'pharmaceuticals/toiletries' not included

3.14 Respondent Characteristics

Summary

58% of town centre visitors were female.

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

65% were from a White background, 17% from a Black and 12% from an Asian background.

62% were employed either full time (45%), or part time (17%). 14% were retired and 9% were students.

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

44% of town centre visitors had access to a car that they could have used to travel to the town centre.

91% of town centre visitors live in London: 38% in Inner London Boroughs and 53% in Outer London Boroughs. 33% of visitors to Central London are from outside London including 14% from outside the UK.

7% had a long-term physical or mental disability which limits daily activities or work they could do.

Gender

Overall, the majority of respondents were female (58%). There were marginally fewer men in the Outer London town centres than in either Central London or Inner London centres – see Figure 36.

Figure 36: Gender by type of centre
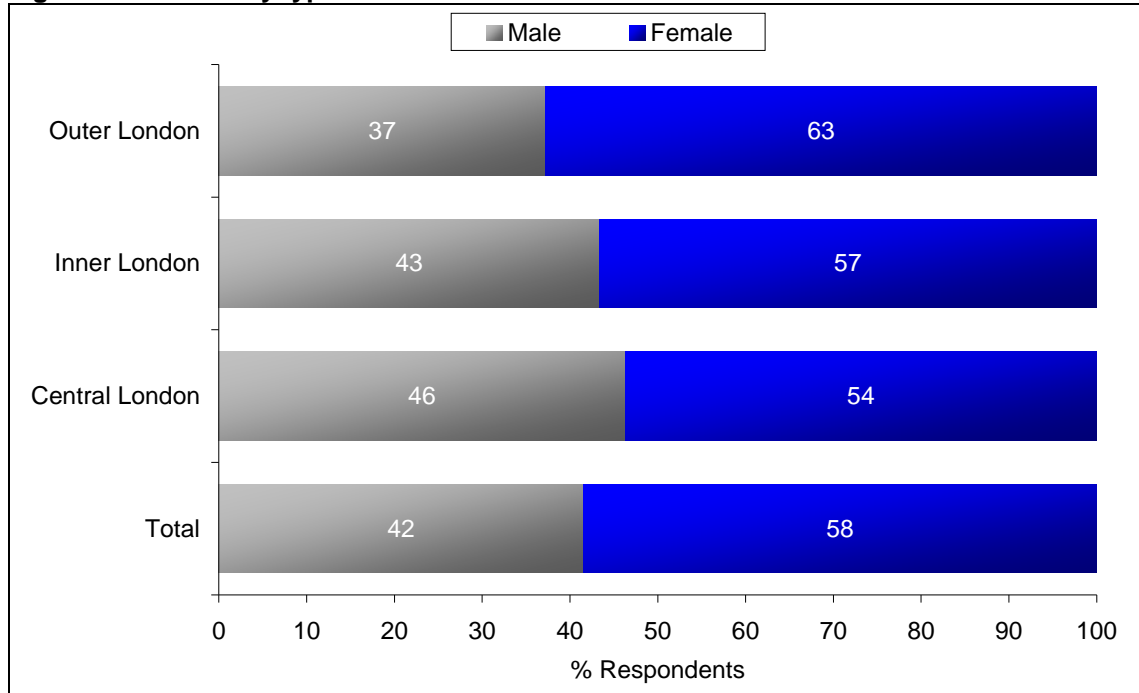
Weighted base: total 4,185, Central London 586, Inner London 2,084, Outer London 1,515

In Kingston and Hornchurch about two thirds were female (between 66% and 67%). In Aldgate 46%, in Harlesden and Bethnal Green 52% were female.

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

Comparison over time				
There has been a slight decrease in female visitors.				
	2013	**2011**	**2009**	**2004**
Male	42%	40%	42%	41%
Female	58%	60%	58%	59%

Age

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

Figure 37: Age
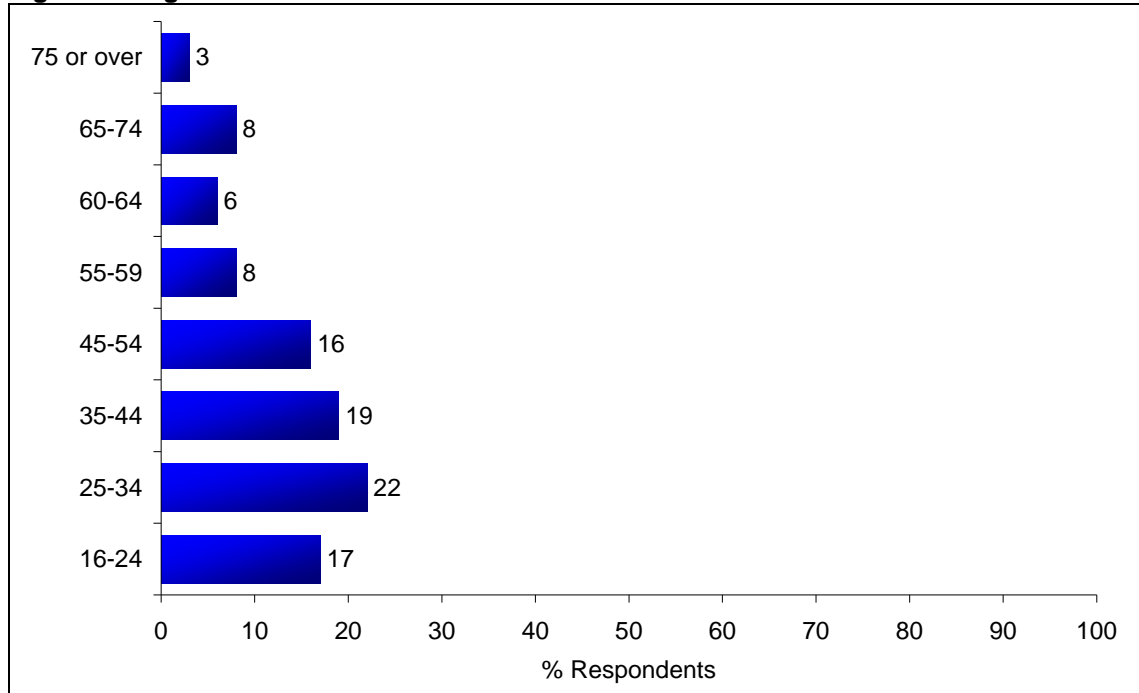
Weighted base: Total sample 4,185

The Central London locations had a slightly younger age profile than the Inner or Outer London town centres, with 18% aged over 55 years old compared to 22% in Inner London town centres and 29% in Outer London town centres. See Figure 38.

Figure 38: Age by type of centre
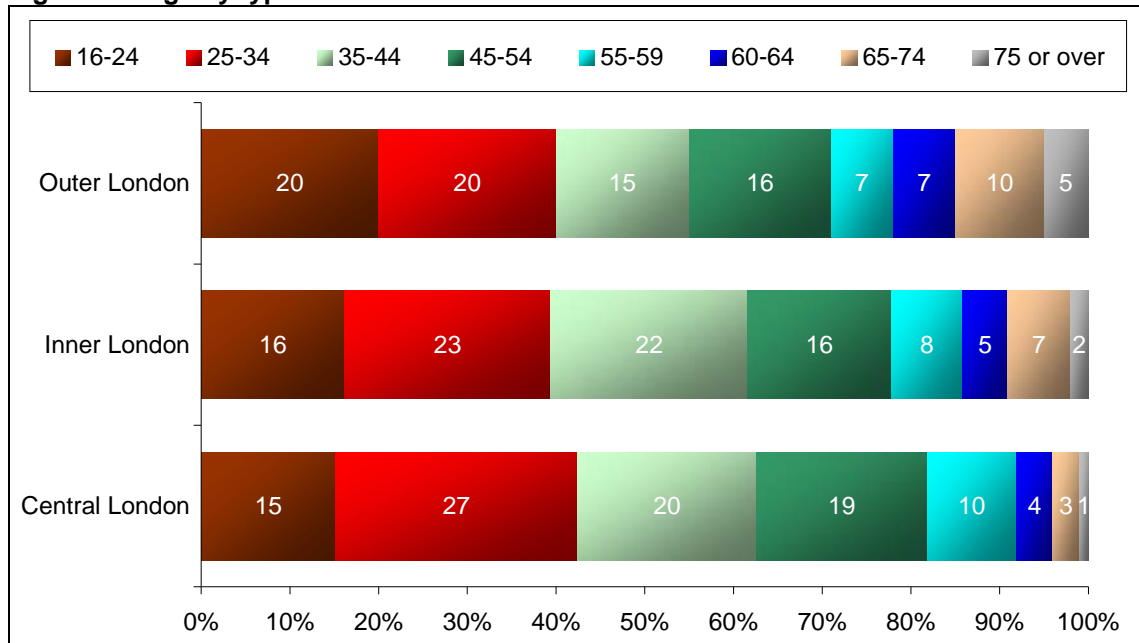
Weighted base: Central London 586, Inner London 2,084, Outer London 1,515

In Romford, Hornchurch and Bromley the profile was older than in the other locations with over a fifth (23%-27%) aged over 60. The profile in Wood Green, Aldgate and Oxford Street/Regent Street is younger than the average with 7%-8% aged over 60.

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

Comparison over time

There is a very similar age profile to 2011.

	2013	2011	2009	2004
16-24	17%	17%	23%	18%
25-34	22%	22%	22%	22%
35-44	19%	19%	20%	22%
45-54	16%	17%	12%	
55-64	14%	13%	11%	
65-74	8%	8%	7%	45%*
75+	3%	4%	3%	

*aged 45 or older. Different age ranges used

Ethnicity

Just under two thirds of the sample (65%) is from a White background, 17% from a Black and 12% from an Asian background as shown in Figure 39.

Figure 39: Ethnicity
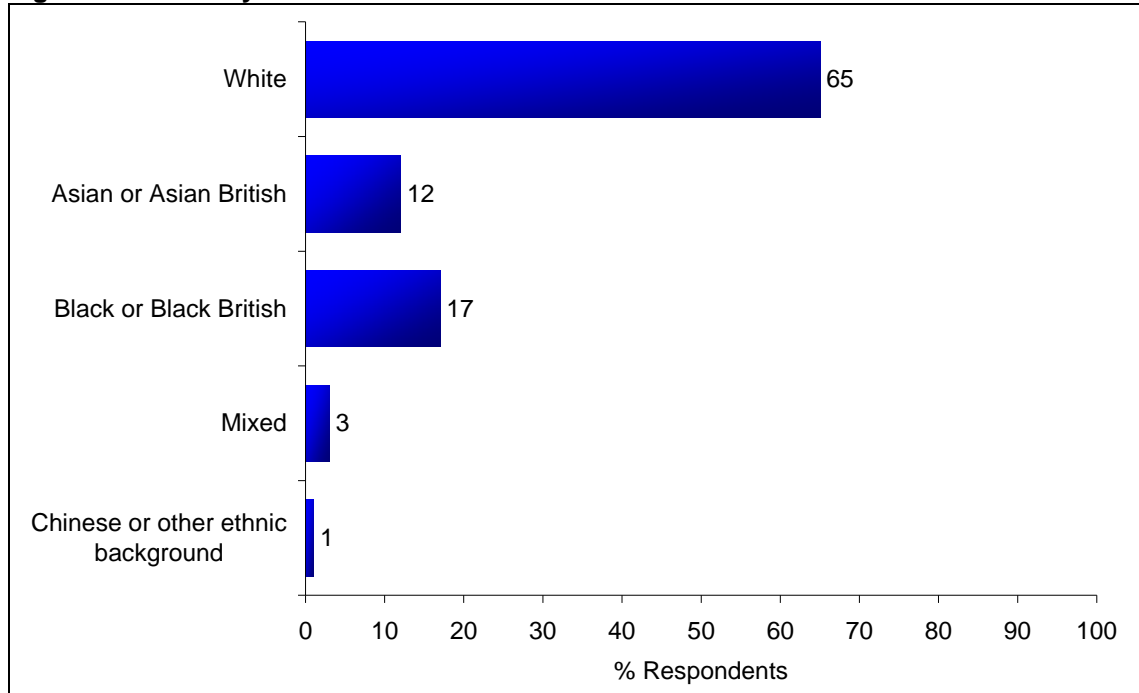
Weighted base: Total sample 4,185

Analysis by type of town centres shows that the Central and Outer London town centres have a higher proportion of White visitors than Inner London town centres– 74% and 77% respectively compared to 54% in Inner London. There are more black visitors in Inner London town centres than elsewhere: 26% compared to between 7% and 10%.

Figure 40: Ethnicity by type of centre
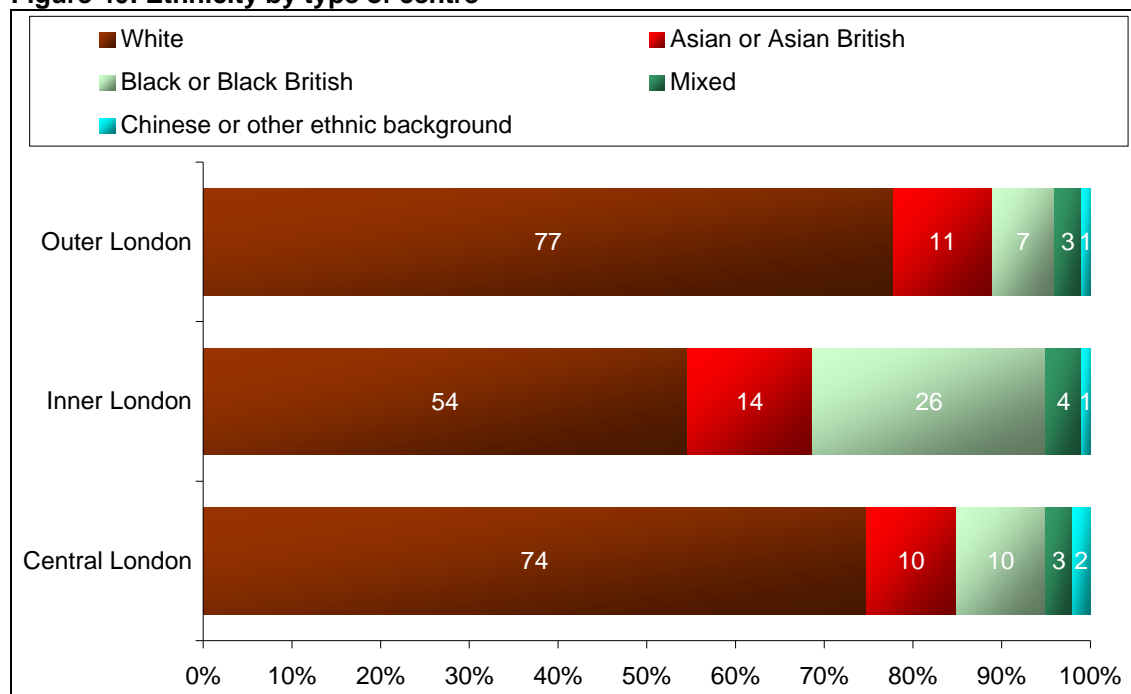
Weighted base: Central London 586, Inner London 2,084, Outer London 1,515

In Kingston 88% were from a White background. At Bromley, Kingston and Romford the proportion from a White background was also much higher than average (between 83% and 86%). Less than half in Harlesden (29%) were from a White background.

In Harlesden 47% of respondents were from a Black ethnic group as were 37% from Hackney, 29% from Kingsland High Street and 28% from Wood Green. In Hounslow 32% were from an Asian background.

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

Comparison over time

There are fewer White visitors and more Asian visitors in 2013 than in 2011.

	2013	**2011**	**2009**	**2004**
White	65%	71%	69%	70%
Black or Black British	17%	16%	16%	12%
Asian or Asian British	12%	6%	9%	12%
Mixed	3%	5%	4%	1%
Other	1%	1%	1%	2%

Employment status

The majority of those who took part in the survey were employed either full time (45%), or part time (17%). Fourteen per cent were retired and 9% were students.

Figure 41: Employment Status

Working full time (30+ hours a week)	45
Working part time (less than 30 hours a week)	17
A full time student	9
A part time student	*
Not working, but looking for work	5
Not working and not looking for work	4
Retired	14
Looking after family and home	4
Other	1

% Respondents
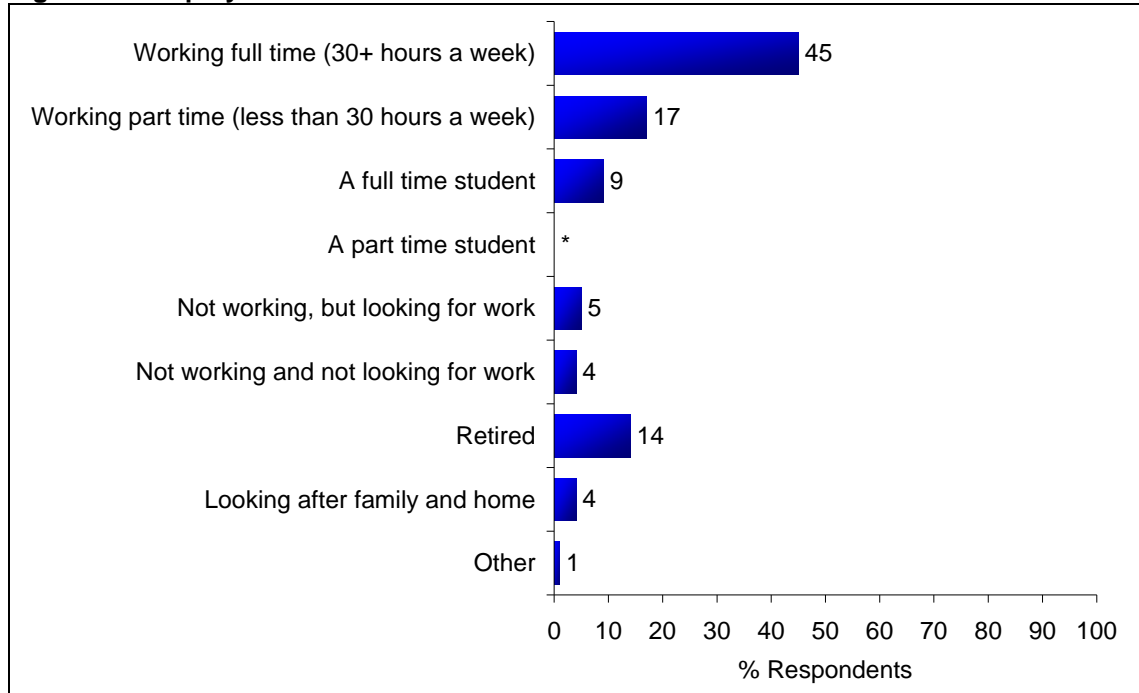
Weighted base: Total sample 4,185
* = less than 0.5%

Those in Central London town centres were much more likely to be employed full time than those in suburban town centres – 64% compared to 43% or 41%. Those in Central London were also less likely to be retired than those in suburban town centres. See Figure 42.

Figure 42: Employment Status by type of centre

Legend:
- Working full time (30+ hours a week)
- Working part time (less than 30 hours a week)
- A full time student
- Not working, but looking for work
- Not working and not looking for work
- Retired
- Looking after family and home
- Other

Centre	Full time	Part time	Full time student	Not working, looking	Not working, not looking	Retired	Looking after family	Other
Outer London	41	15	11	4	3	19	5	1
Inner London	43	19	8	6	5	13	4	
Central London	64	14	9	3	2	5		1
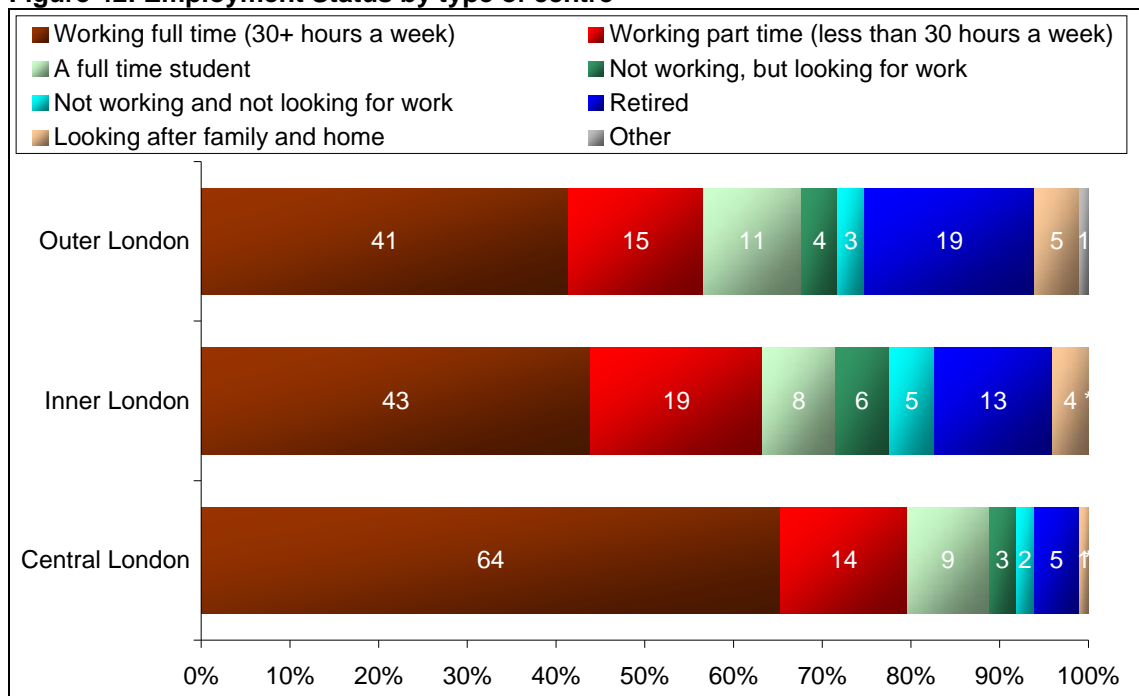
Weighted base: Central London 586, Inner London 2,084, Outer London 1,515
* = less than 0.5%

The highest proportion of employed respondents was in Oxford Street/Regent Street (79%), Aldgate (77%), Wood Green (71%) and Hackney (68%). The lowest proportions were in Romford (49%) and Hounslow (56%).

There were high proportions of retired people in Romford (25%) and Hornchurch (23%).

The highest proportions of students were in Kingston (17%) and Ealing Broadway (15%).

Details of employment status by individual town centre are provided in Table 62 in Appendix B.

Comparison over time				
There proportion of employed respondents has increased in each survey since 2009.				
	2013	**2011**	**2009**	**2004**
Working full time	45%	44%	40%	41%
Working part time	17%	16%	15%	14%
Other	38%	40%	45%	45%

Household Income

Over half the sample (51%) said they were the chief income earner of the household. The proportion was higher in Central and Inner London than in Outer London.

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

	Total %	Central London %	Inner London %	Outer London %
Yes, respondent is Chief Income Earner	51	55	53	47
No, someone else	46	42	45	50
Refused	2	2	2	2
Weighted base	**4,185**	**586**	**2,084**	**1,515**

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

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

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

	Total %	Central London %	Inner London %	Outer London %
Under £5,000	2	2	2	3
£5,000-£9,999	4	2	4	4
£10,000-£14,999	5	3	6	4
£15,000-£19,999	5	4	6	4
£20,000-£24,999	6	5	7	4
£25,000-£34,999	10	11	12	8
£35,000-£49,999	10	12	9	10
£50,000-£74,999	8	14	6	9
£75,000-£99,999	3	5	2	3
£100,000 or over	2	4	1	2
Don't know	21	17	21	22
Refused	24	20	25	25
Weighted base	**4,185**	**586**	**2,084**	**1,515**

Details of income by individual town centre are provided in Table 63 in Appendix B.

When the survey income data (reweighted after excluding refusals and don't knows) is compared to overall London data (from Paycheck 2010[17]) it shows that the town centre sample tends to have lower household incomes than the background London population.

Figure 43: Town centres annual household income compared to overall London

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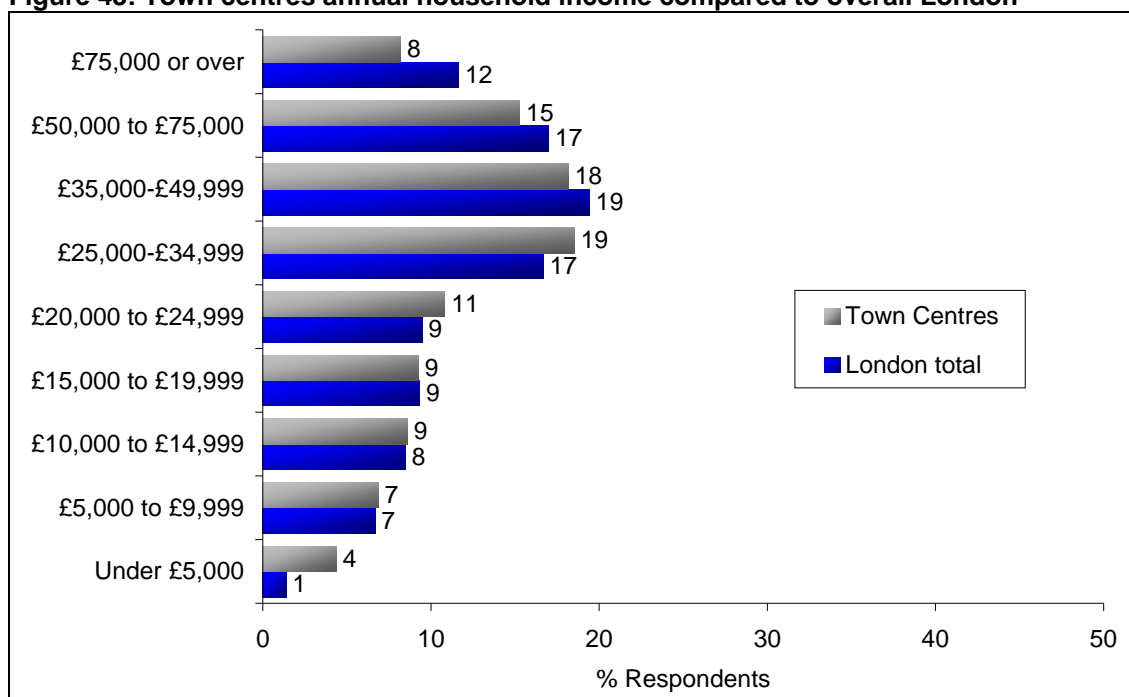
Household Size

The median household size was two, representing 27% of households. Sixteen pre cent of respondents lived alone.

Figure 44: Number of people in household
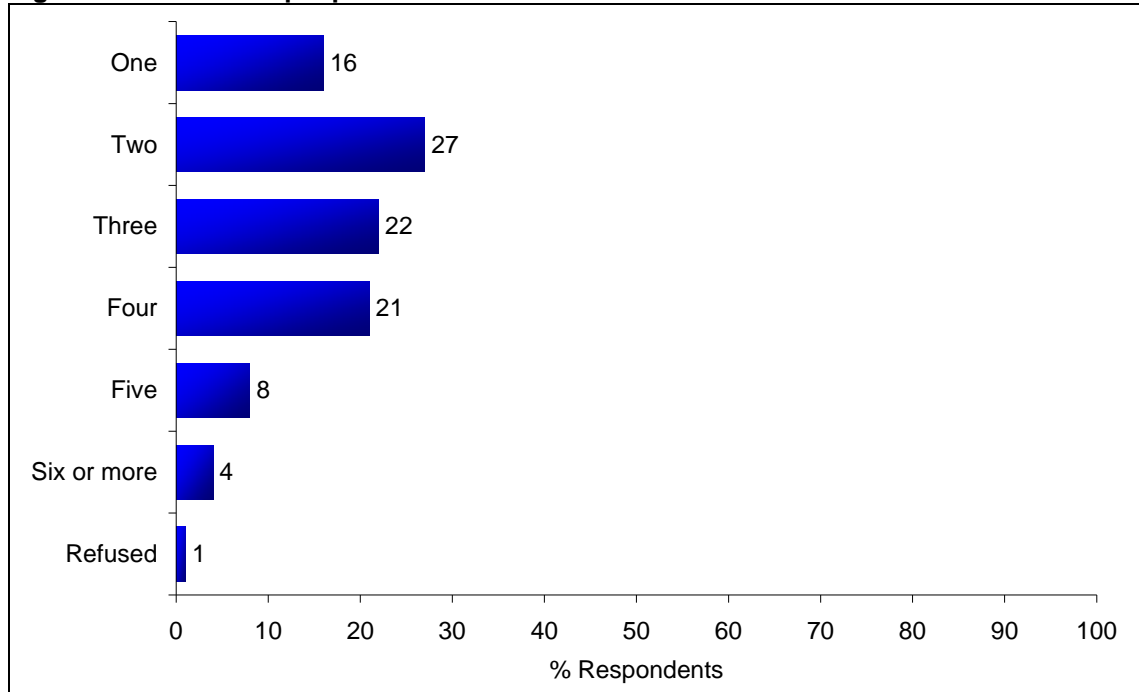
Weighted base: Total sample 4,185

Visitors to the Central London town centres were least likely to live alone: 12% compared to 17% for Inner and Outer London.

Figure 45: Number of people in household by type of centre
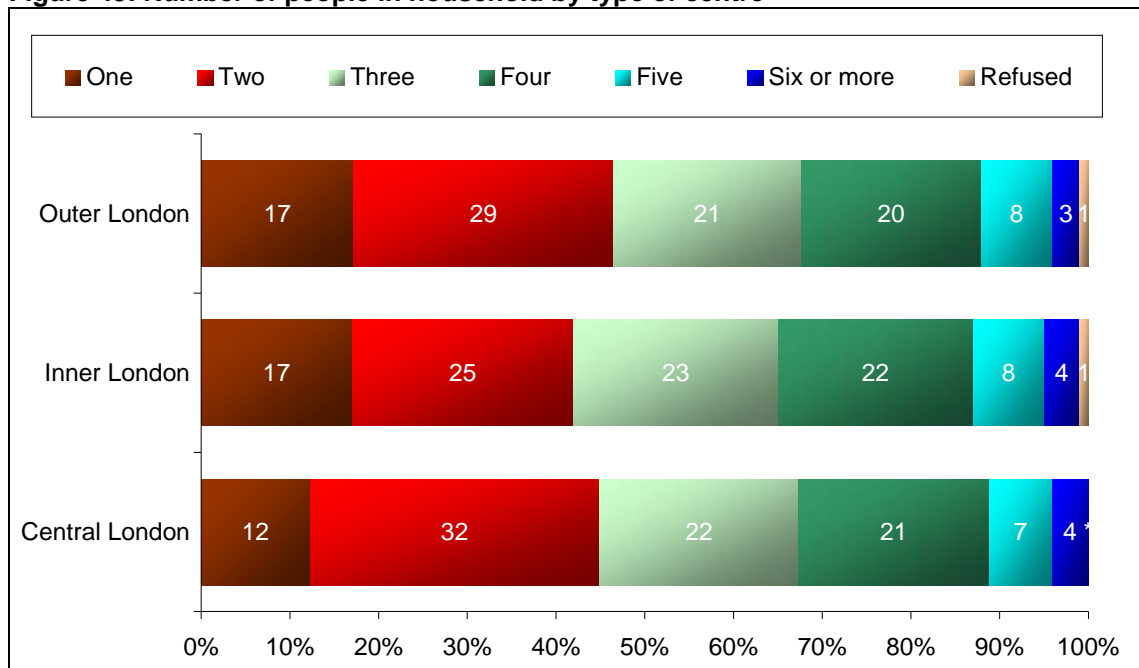
Weighted base: Central London 586, Inner London 2,084, Outer London 1,515
* = less than 0.5%

In Harlesden (39%), Shepherd Bush (37%) and Hounslow (36%) over a third lived in larger households of four or more people.

A fifth or more in Bethnal Green (22%), Ealing Broadway (22%) Shepherd Bush (21%) and Kingsland High Street (20%) lived in one person households.

Details of household size by individual town centre are provided in Table 64 in Appendix B.

Access to a Car

Less than half the sample (44%) said they had access to a car that they could have used to travel to the town centre.

Car access was much higher in the Outer London town centres (53%) than the Inner London town centres (37%) or Central London (44%).

Just over one fifth (22%) of those from Outer London town centres drove on the day of interview compared with 11% for Inner London town centres and 3% for Central London.

Figure 46: Access to a car by type of centre
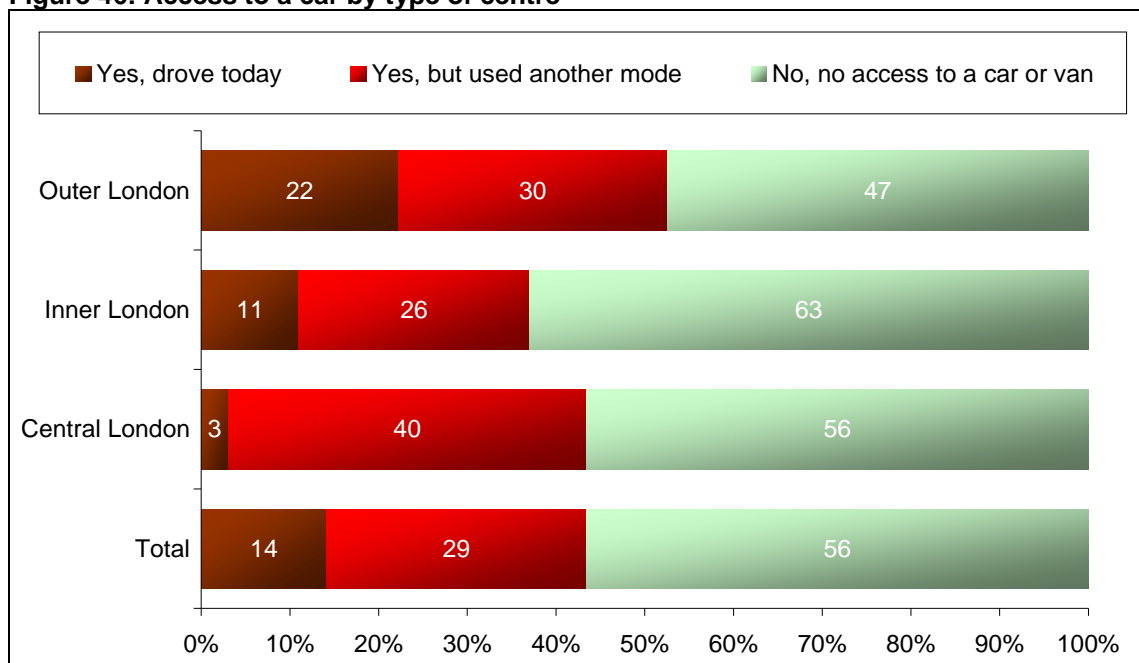
Weighted base: total 4,185, Central London 586, Inner London 2,084, Outer London 1,515

There was a particularly high level of access to a car in Kingston (63%), Bromley (59%) and Hornchurch (59%).

Car access in Hackney (27%), Shepherds Bush (30%), Bethnal Green (31%) and Kingsland High Street (32%) was low.

Details of access to a car by individual town centre are provided in Table 65 in Appendix B.

Comparison over time

There has been a decrease in car access over time.

	2013	2011	2009	2004
Yes, drove today	14%	15%	16%	22%
Yes, used other mode	29%	30%	31%	28%
No access to a car	56%	55%	52%	50%

Where town centre visitor lives

Overall, 91% of town centre visitors lived in London: 35% in Inner London Boroughs[18] and 56% in Outer London Boroughs.

As would be expected the majority of visitors to Outer London town centres live in Outer London Boroughs (83%) and the majority of visitors to Inner London town centres live in Inner London Boroughs (54%).

A third of visitors to Central London are from outside London including 14% from outside the UK.

Figure 47: Where live by type of centre
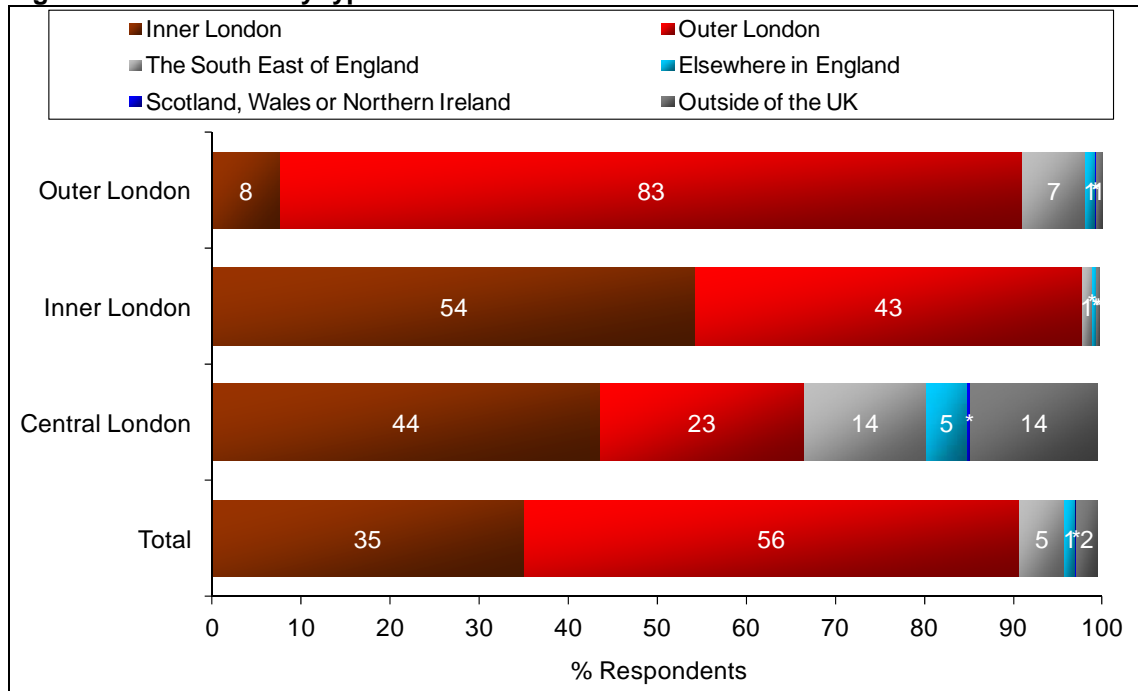
Weighted base: total 4,144, Central London 576, Inner London 2,062, Outer London 1,507
* = less than 0.5%

Details of where the respondent lives by individual town centre are provided in Table 70 in Appendix B.

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

Physical and Mental Impairments

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

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

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

	Total %	Central London %	Inner London %	Outer London %
No, none	93	96	93	91
Mobility impairment	4	2	4	6
Visual impairment	1	0	1	1
Hearing impairment	1	1	1	1
Learning disability	*	*	*	1
Mental health condition	1	*	*	1
Serious long term illness	1	*	1	1
Other	*	*	*	1
Weighted base	**4,171**	**583**	**2,081**	**1,507**

* = less than 0.5%

Wheelchair Usage

Less than one per cent of the sample uses a wheelchair.

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

	Total %	Central London %	Inner London %	Outer London %
Yes	*	*	*	1
No	99	99	99	99
Weighted base	**4,164**	**581**	**2,081**	**1,503**

* = less than 0.5%

Wheelchair use by individual town centre is shown in Table 67 in Appendix B.

Ease of Moving Around the Area

A new question was added for the 2013 survey probing the ease of moving around the area.

Only two per cent said they found it difficult or very difficult to move around the area. See Figure 48.

Figure 48: Ease of moving around the area
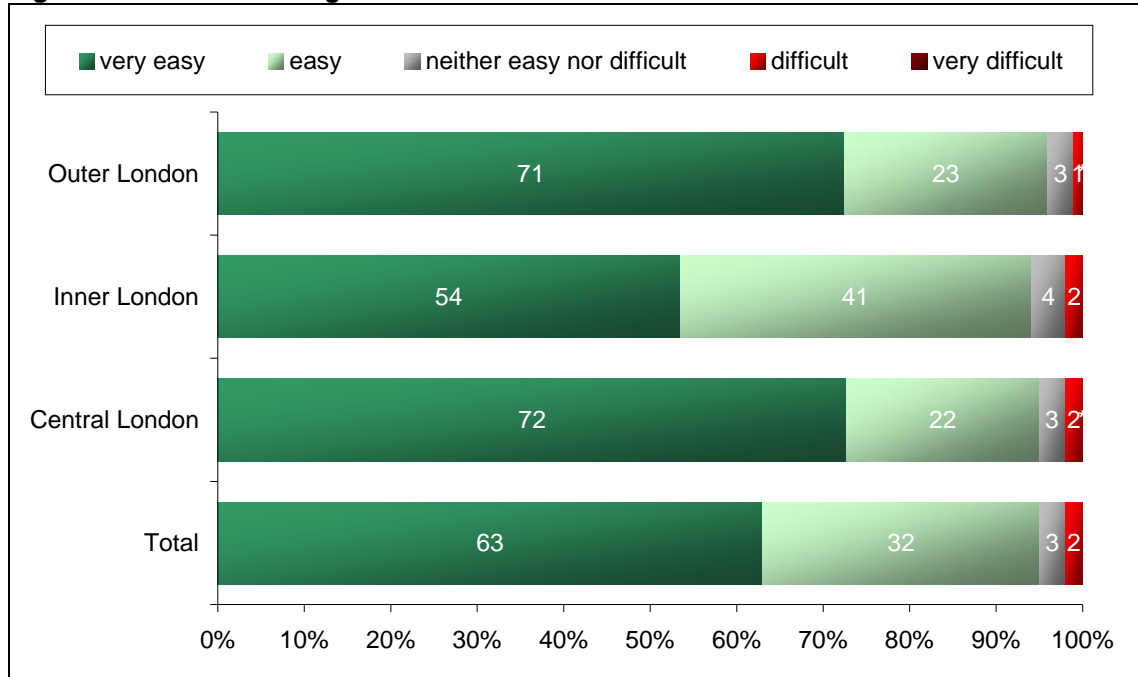
Weighted base: total 4,185, Central London 586, Inner London 2,084, Outer London 1,515
* = less than 0.5%

Five per cent in Hornchurch and 3% in Bethnal Green said they found it difficult or very difficult to move around the area. None in Wood Green and less than 0.5% in Hackney and Harlesden found it difficult or very difficult to move around the area.

Details of ease of moving around the area by individual town centre are provided in Table 69 in Appendix B.

Whether carrying anything

Over half the town centre visitors were carrying shopping bags or using a shopping trolley (55%) and 7% had a suitcase or rucksack.

Figure 49: Whether respondent carrying anything
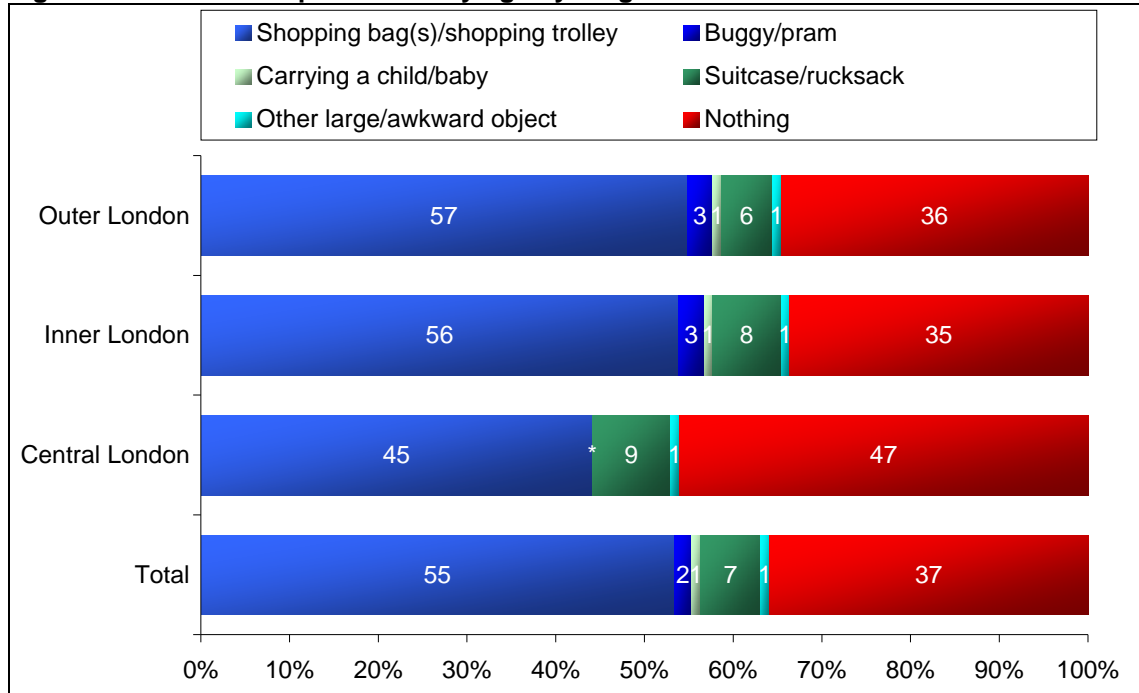
Weighted base: total 4,185, Central London 586, Inner London 2,084, Outer London 1,515
* = less than 0.5%

Details of what was carried by individual town centre are provided in Table 68 in Appendix B.

4. RETAIL PARK PILOT FINDINGS

4.1 Introduction

This chapter sets out the findings of the pilot of the retail park survey undertaken at Tottenham Hale Retail Park.

Where appropriate the results are compared to the weighted Total and Outer London town centres.

The research findings are structured as follows:

- Nature of visit
    - 4.2 Purpose of Visit
    - 4.3 Time Spent
    - 4.4 Frequency of Visiting
- Travel to town centre
    - 4.5 Mode of Transport
    - 4.6 Attitudes to and Use of Bus
- Attitudes
    - 4.7 Attitudes towards Retail Park
    - 4.8 Use of Other Shopping Centres
- Goods purchased and spend
    - 4.9 Shopping and Expenditure in the Area
    - 4.10 Average Spend
    - 4.11 Online Shopping
- 4.12 Respondent Characteristics.

4.2 Purpose of Visit

The retail park was used by both those who live and work in the area and by visitors from outside the area. The majority (71%) do not live or work within 10 minutes walk of the retail park but 21% live in the area, 6% work in the area and 2% both live and work within 10 minutes walk of the retail centre.

Figure 50: Whether live or work within 10 minutes walk
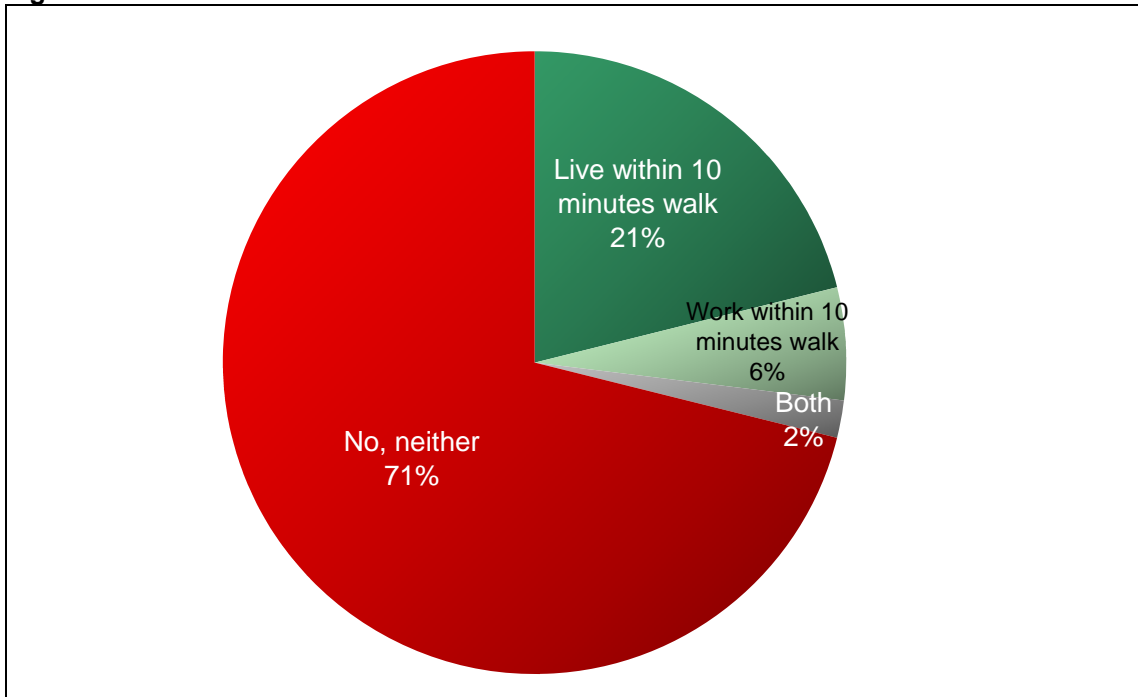
Base: all respondents: 164

Figure 51 shows that those visiting Tottenham Hale were less likely to live within 10 minutes of the centre (23%[19]) than the total (28%) but were slightly more likely to live within 10 minutes of the centre as those in Outer London (21%).

Figure 51: Whether live or work within 10 minute walk by type of centre
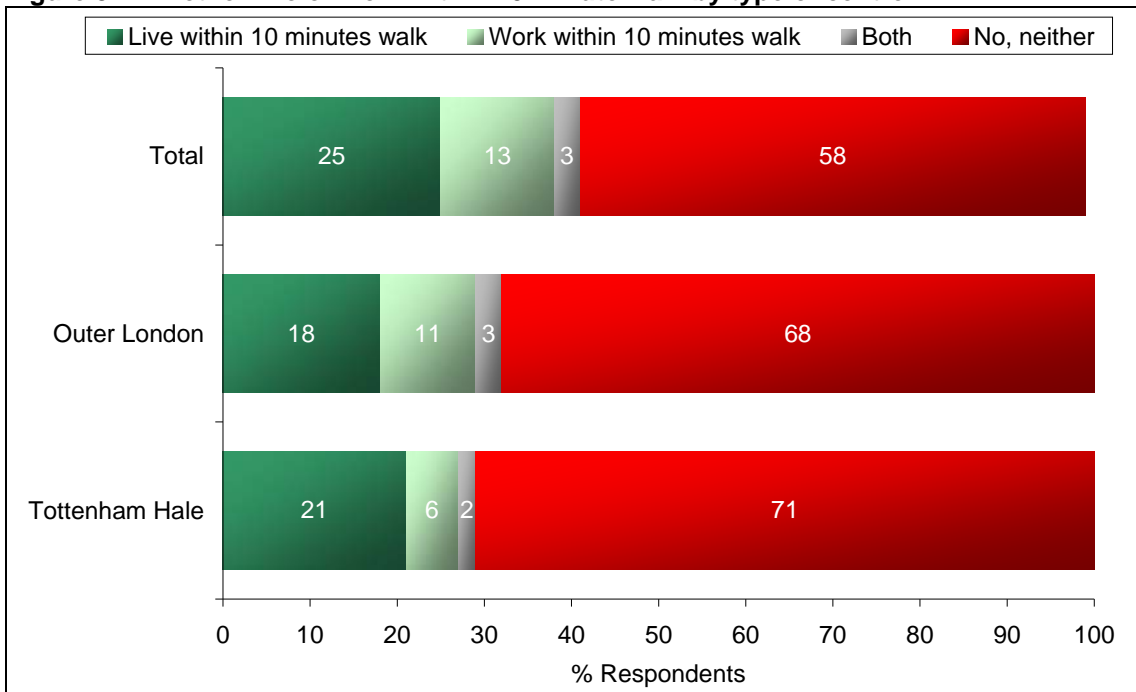
Base: Tottenham Hale 164; Outer London 1,515; Total 4,185

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[19] 21% live and 2% live and work

Reasons for visiting

All visitors were recruited on the basis that they were shopping, using a service or doing both in the retail park. Shopping was the predominant purpose and the main reason for visiting for almost nine in ten visitors. Eating and drinking out was also important, being mentioned by 20%, but was only the main purpose for 3%. All reasons and the main reasons for visiting the area are as shown in Table 34.

Table 34: Reasons for visiting retail park

	All purposes %	Main purpose %
Shopping	92	87
Eating/drinking out	20	3
Visiting friends and relatives	9	5
Work here	4	3
Window shopping	3	1
Other social/leisure	1	1
General recreation	1	1
Base	**164**	**164**

Table 35 shows the reasons for visiting according to the type of centre. Unsurprisingly, comparisons between centres suggest that those visiting the Tottenham Hale Retail Park were more likely to be doing so for shopping than those visiting other centres. They were also somewhat more likely to be visiting friends and/or relatives.

Table 35: Reasons for visit by type of centre

	Retail Park		All		Outer London	
	All purposes %	Main purpose %	All purposes %	Main purpose %	All purposes %	Main purpose %
Shopping	92	87	75	60	82	66
Eating/drinking out	20	3	23	7	23	6
Using service	-	-	20	9	19	8
Work here	4	3	10	9	8	7
Live here	0	0	7	3	5	1
Visiting friends and relatives	9	5	5	3	4	3
Personal business	-	-	5	3	4	2
Window shopping	3	1	4	1	5	1
Using public amenity	-	-	4	2	4	2
Other social/leisure	1	1	3	2	2	1
Travelling through the area	-	-	2	1	2	1
General recreation	1	1	1	*	1	*
Dropping off/picking up friend or relative	-	-	1	*	1	*
Delivering goods	0	0	*	*	*	0
Buying petrol	0	0	*	0	*	0
Other	0	0	1	1	1	1
Weighted base)	**164**	**164**	**4,185**	**4,185**	**1,515**	**1,515**

* = less than 0.5%

- = not applicable

4.3   Time Spent

The majority (87%) said they were planning to spend at least half an hour in the retail park with 57% spending between 30 and 59 minutes.

Figure 52: Time spent in retail park
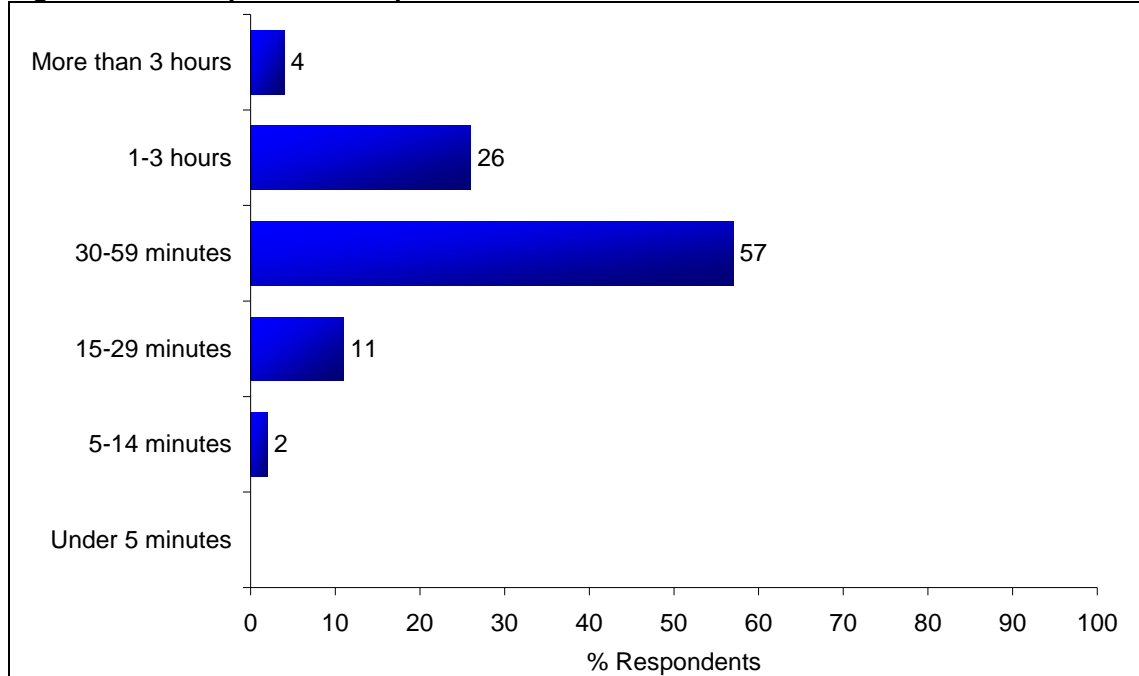
Base: Tottenham Hale: 164

Those in Tottenham Hale were notably more likely to spend *less* time in the area; only three in ten would be spending one hour or more in the area. This compares with 79% in outer London and 69% in total.

Figure 53: Time spent by type of centre
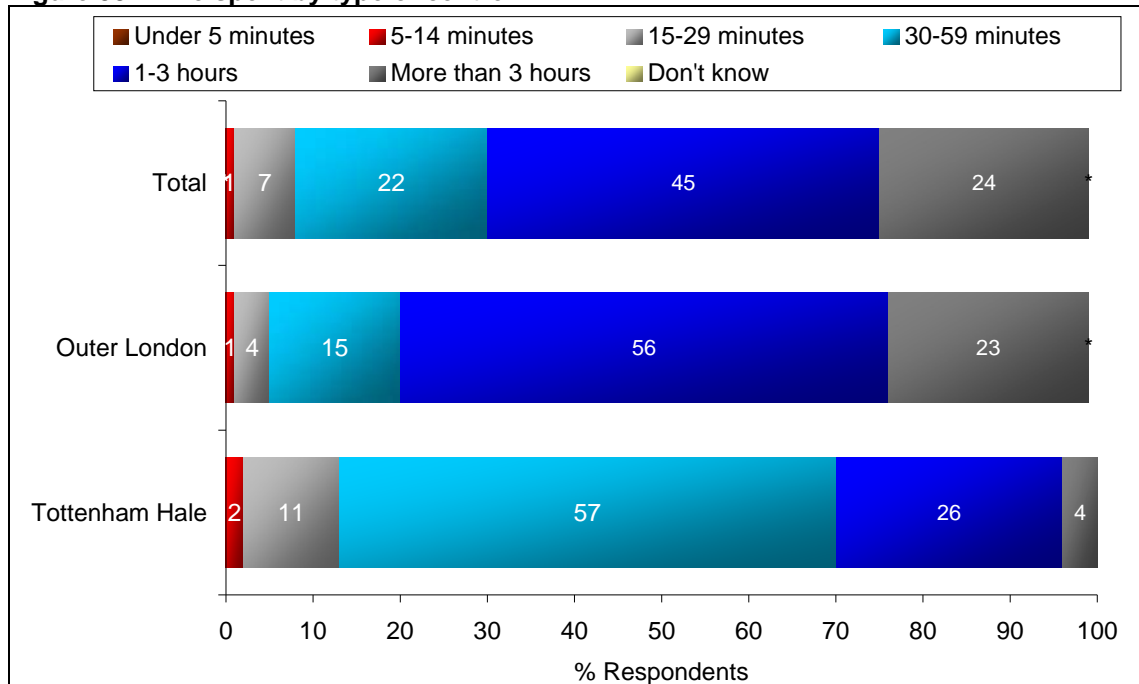
Base: Total 4,185; Outer London 1,515; Tottenham Hale 164
* = less than 0.5%

4.4 Frequency of Visiting

Just over half visit the Tottenham Hale Retail Park on a regular basis; 55% visit the area once a week or more often as shown in Figure 54. Around one in ten (9%) visit the retail park five or more days a week.

Figure 54: Frequency of visiting retail park
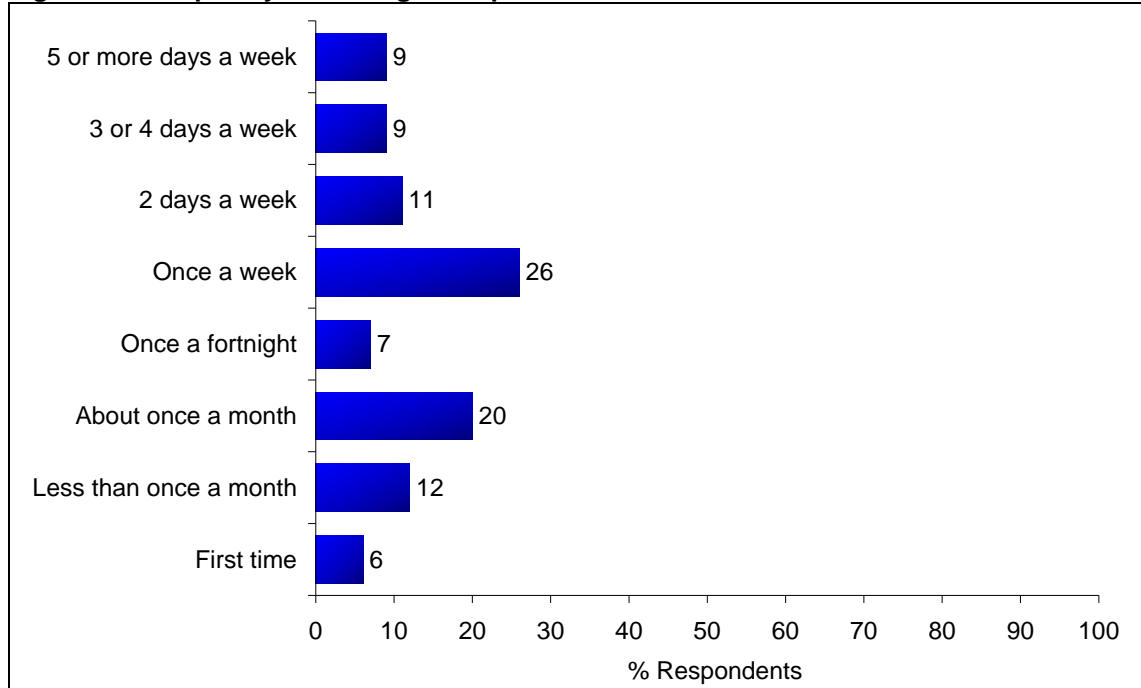
Base: Tottenham Hale: 164

The average number of visits per month was 5.5. Tottenham Hale was visited much less frequently than other centres in Outer London (average number of visits 9.8 per month) and when compared with the total (11.2).

Figure 55: Frequency of visiting area by type of centre
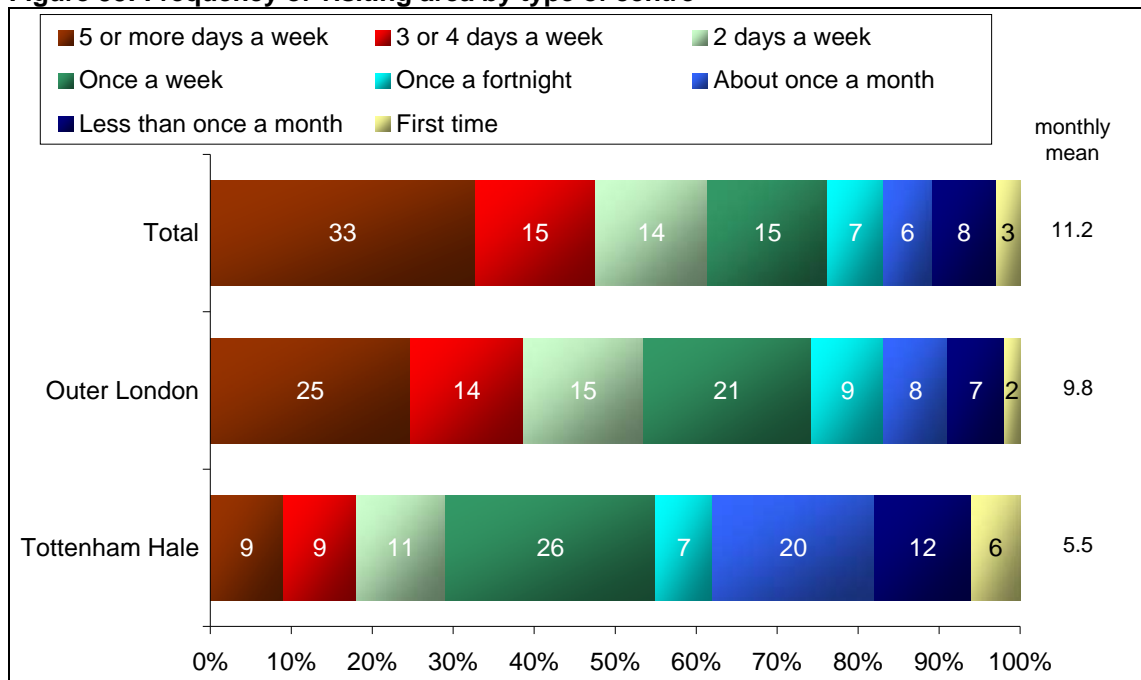
Base: Total 4,185; Outer London 1,515; Tottenham Hale 164

4.5 Mode of Transport

Mode used

Driving a car, van or lorry was the mode of transport used by the highest proportion of visitors (37%). One in four walked to the retail park, 17% used the bus, 9% used the tube/Underground and 7% used the train, as shown in Figure 56.

Figure 56: Mode of access to area
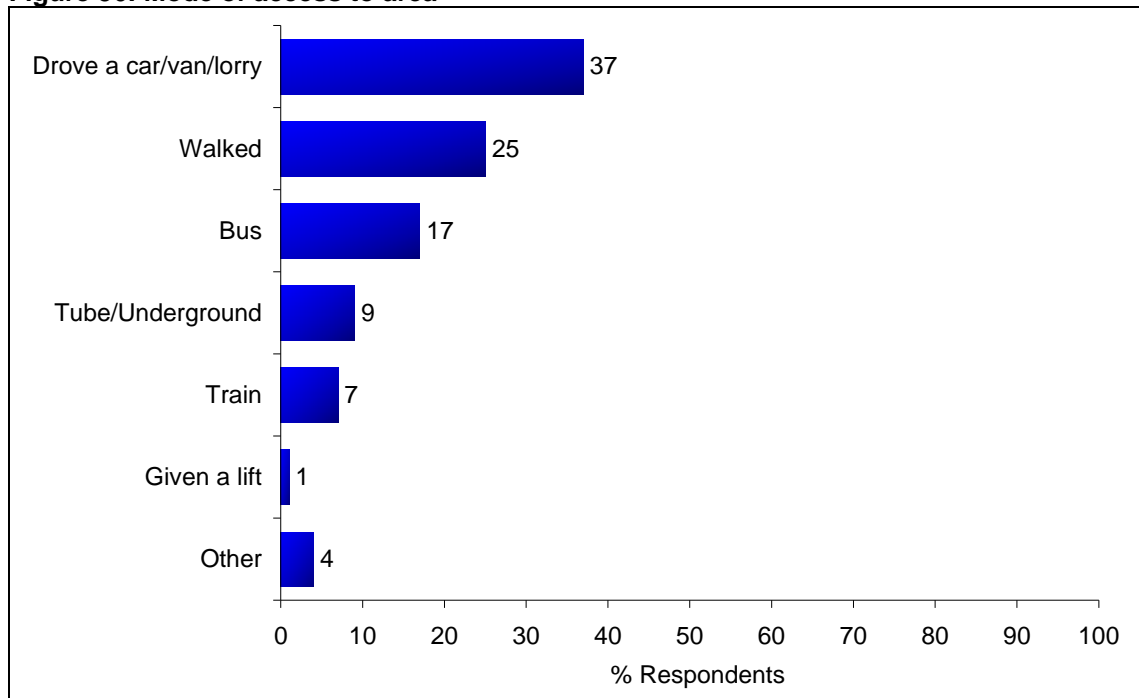
Base: Tottenham Hale: 164

When compared with other types of centres, those visiting Tottenham Hale Retail Park were notably more likely to drive to reach the centre. More than one third drove to Tottenham Hale (37%), compared with 20% of those visiting a centre in Outer London and 12% of the total. By comparison, bus was more commonly used by those visiting Outer London (39%) and the total (34%) than those visiting Tottenham Hale (17%).

Figure 57: Mode of access to area by type of centre

Legend:
- Bus
- Walked
- Drove a car/van/lorry
- Tube/Underground
- Train
- Bicycle
- Given a lift
- Other
- Taxi/minicab
- Drove a motorbike/moped/scooter
- Drove a delivery vehicle
- Barclays Cycle Hire

Type of centre	Bus	Walked	Drove a car/van/lorry	Tube/Underground	Train	Others
Total	34	27	12	13	9	2 2*
Outer London	39	21	20	5	9	2 2*
Tottenham Hale	17	25	37	9	7	*1 5 *
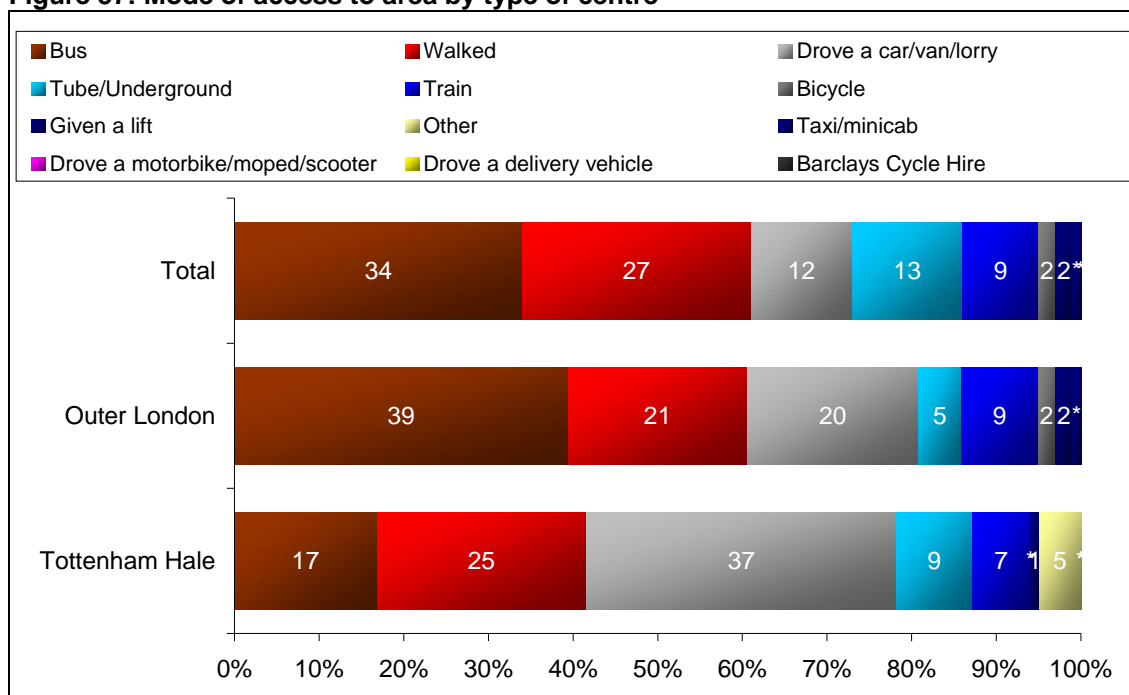
Base: Total 4,185; Outer London 1,515; Tottenham Hale 164
* = less than 0.5%

Why Modes used

Respondents were shown a showcard with possible reasons for choosing to travel by the particular mode used to access the area. Table 36 below shows the findings. The most frequently mentioned reasons for choosing to travel by that particular mode were a perception that the mode chosen was quicker (54% mentioned this reason) and easier/more convenient (mentioned by 49%). Other common reasons for choosing the mode of transport included that the mode was more direct (26%) and/or more relaxing/comfortable (21%).

Table 36: Reasons for using chosen method of transport rather than any other method of transport to access area

	%
Quicker	54
Easier/more convenient	49
More direct	26
More relaxing/comfortable	21
Cheaper/less expensive	14
Live very close by	13
Going to more than one place	13
Had heavy bags/shopping to carry	12
Only method possible	4
Safer	4
Need/enjoy exercise/healthy	2
Weather issues	2
Avoids parking difficulties	1
No car/can`t drive	1
Travelling with children	1
Other	2
base	**164**

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

Table 37: Reasons for using chosen method of transport rather than any other method of transport to access area by main modes

	Total	Car	Bus	Train/ tube	Walk
Quicker	54	56	46	63	54
Easier/more convenient	49	54	39	67	41
More direct	26	18	32	41	22
More relaxing/comfortable	21	21	14	30	22
Cheaper/less expensive	14	10	39	4	12
Live very close by	13	2	*	*	39
Going to more than one place	13	28	7	7	*
Had heavy bags/shopping to carry	12	20	18	4	2
Safer	4	2	*	22	*
Only method possible	4	5	11	*	2
Weather issues	2	2	7	*	2
Need/enjoy exercise/healthy	2	*	*	*	7
Avoids parking difficulties	1	*	*	4	*
Travelling with children	1	3	*	*	*
No car/can't drive	1	*	4	4	0
Other	2	2	0	0	5
Base	**164**	**61**	**28**	**27**	**41**

* = less than 0.5%

The fact that the means of transport was 'quicker' was the most frequently mentioned among most modes (except for train/tube where 'easier/more convenient' was a slightly more popular reason). Notable differences among the different modes are that drivers were much more likely than others to cite 'going to one place' (28%, compared with 7% of both bus and train/tube users and no walkers) as a reason. Many more car (20%) and bus users (18%) mentioned having heavy bags or shopping to carry as a reason than train/tube users (4%) and those who walked (2%). The fact that the journey was cheaper was also a key reason for bus users (39%), while this was not the case for others. Train/tube users were more likely to cite their choice as 'easier/more convenient' (67%), 'more direct' (41%) and 'safer' (22%) than others. Among those who walked to the retail park, the fact that they lived close by was a key reason for their choice (39%); this reason was only mentioned by 2% of those who drove and none of the bus users or walkers.

It is worth noting that, compared to the total sample, visitors to Tottenham Hale Retail Park were more likely to:

- travel by car because it is easier/more convenient (54% compared to 34% of the total)
- travel by bus because it is quicker (46% compared to 32% of the total) or easier/more convenient (39% cf 26%)
- travel by train/tube because it is easier/more convenient (67% cf 26%) or more relaxing/comfortable (30% cf 10%) or safer (22% cf 3%)
- walk because it is quicker (54% cf 37%), easier/more convenient (41% cf 11%) or more relaxing/comfortable (22% cf 5%),

The **main** reasons for choosing to travel by the particular mode used to access the area are shown in Table 38. The main reasons are ease/convenience (24%) and that the chosen mode was quicker (23%).

Table 38: Main reason for using chosen method of transport rather than any other method of transport to access area

	%
Easier/more convenient	24
Quicker	23
Live very close by	12
Going to more than one place	9
More direct	7
More relaxing/comfortable	7
Cheaper/less expensive	6
Had heavy bags/shopping to carry	6
Only method possible	4
Need/enjoy exercise/healthy	1
Weather issues	1
Travelling with children	1
Other	1
Base	**164**

Other modes of transport used sometimes

Just over half (54%) did not use any modes other than the one they used to access the retail park.

Walking and buses were the most used 'other' modes; 15% sometimes walked to Tottenham Hale while 13% sometimes used the bus. One in ten sometimes made the journey by tube/Underground. One in six (16%) car users sometimes walked to the retail park, similar to the proportions of bus (18%) and train/tube users (19%).

Car users and walkers were least likely to sometimes use other means of transport to access the retail park (66% and 56% respectively did not do so, compared with 36% of bus users and 37% of train users).

Figure 58: Other modes of access sometimes used
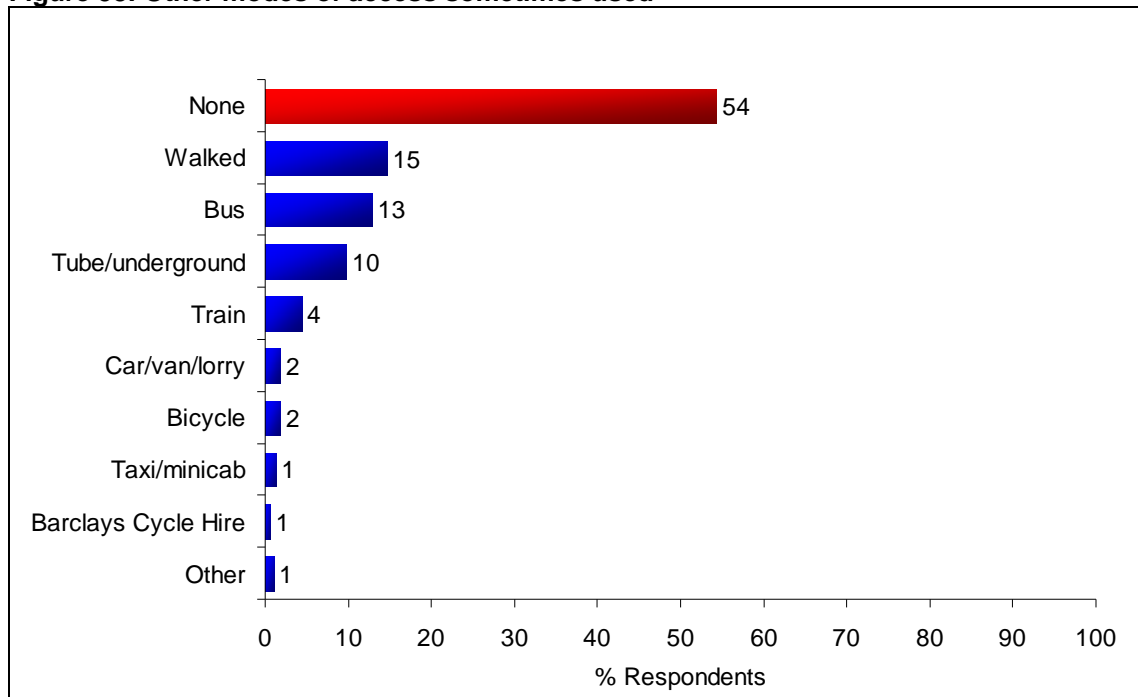
Base: Tottenham Hale: 164

Tottenham Hale Retail Park visitors were less likely to use other means of transport to the one they used on the day of the interview than other Outer London visitors; 46% of Tottenham Hale Retail Park visitors used other modes compared with 59% of Outer London visitors. Bus was the most frequently mentioned mode sometimes used by Outer London visitors (25%), while only 10% sometimes walked.

Frequency of mode use

Respondents were asked how often they travelled to Tottenham Hale Retail Park using the means of transport they used that day. As shown in Figure 59 over half (55%) travelled to the retail park at least once a week using the same means of transport, although this varied by mode. Walkers were much more likely to visit frequently (85% did so at least once a week), while train/tube users were least likely to do so (27%). The latter group were the most likely to say it was their first visit to the retail park (11%, compared with 5% of car users, 4% of bus users and 2% of walkers).

Figure 59: Frequency of using mode to travel to this area
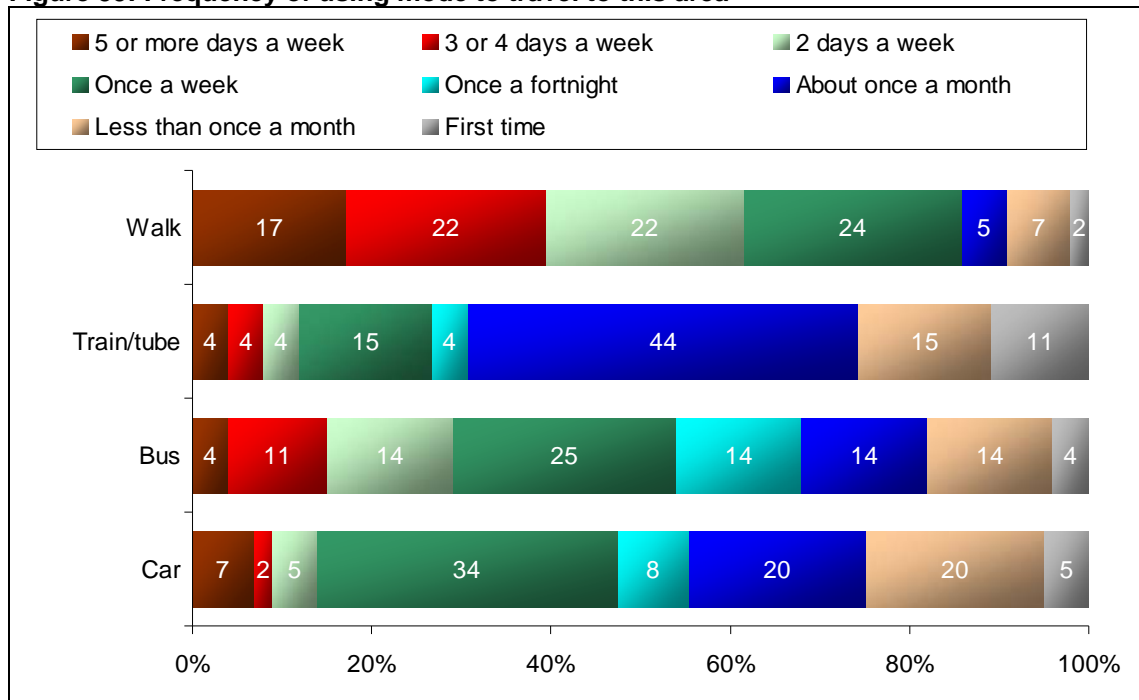
Base: Tottenham Hale: car 61, bus 28, train/tube 27, walk 41

When compared with the total sample, Tottenham Hale Retail Park visitors make fewer visits than respondents do to other town centres, as discussed in Section 4.4. People who walk (either to Tottenham Hale or to other town centres) do so more frequently than other users, but visitors on foot to Tottenham Hale Retail Park make fewer visits. For example, 17% of walkers to Tottenham Hale Retail Park visit at least five times a week compared to 49% of walkers to other town centres.

Parking

Those who had driven to the retail park (61 people) were asked about parking in the area and ease of access to the area by car. Almost all (97%) had parked in the Tottenham Hale Retail Park.

Car users' satisfaction with parking

Almost all car drivers were satisfied with the number of parking spaces provided at Tottenham Hale (mean score of 8.6 on a scale from 0, very dissatisfied to 10, very satisfied) and most were satisfied with the ease of access to retail park by car (mean scores of 7.2) as shown in Figure 60.

Figure 60: Satisfaction with ease of access to the area by car and number of parking spaces provided in this area
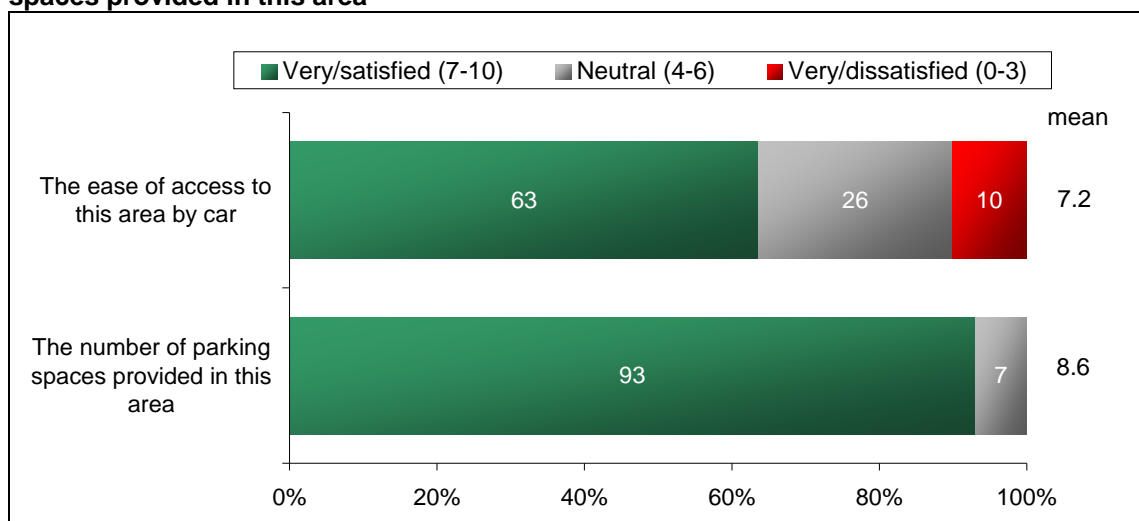
Base: those who drove to Tottenham Hale (61)

Car drivers to Tottenham Hale Retail Park were notably more satisfied with the number of parking spaces than were visitors to Outer London town centres and the total, but were less satisfied with the ease of access to their area by car.

Figure 61: Satisfaction with ease of access to the area by car and number of parking spaces provided in this area by type of area
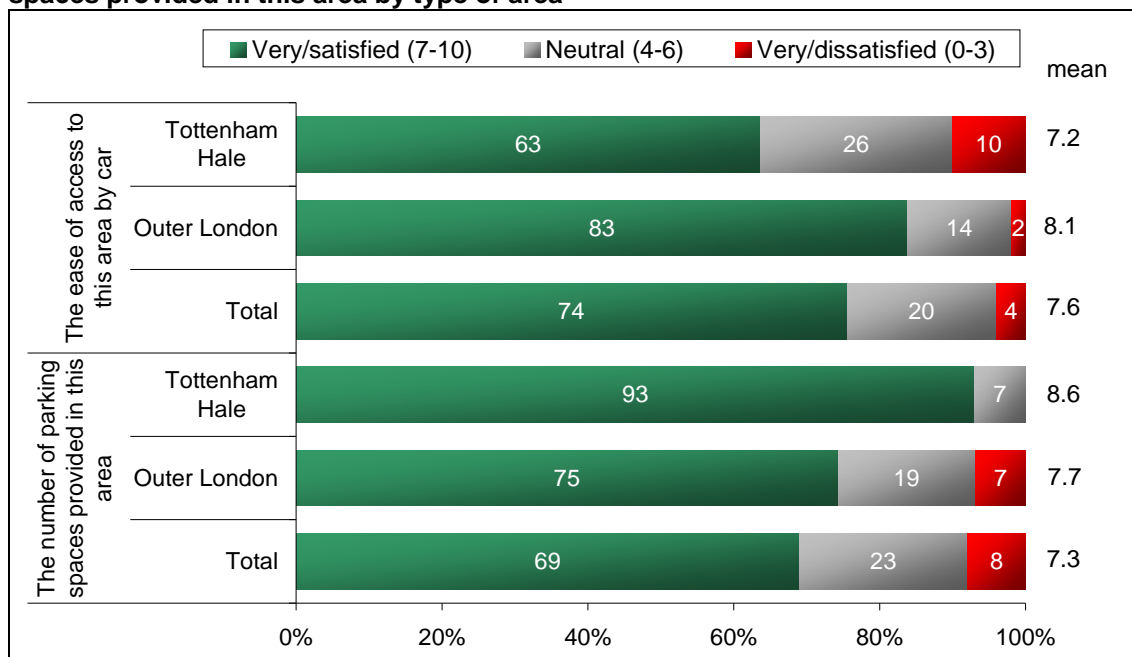
Base: those who had driven to area: Total 597; Outer London 344; Tottenham Hale 61

4.6 Attitudes to and Use of Bus

Bus users' satisfaction

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

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

Figure 62 shows the results for those who travelled to Tottenham Hale Retail Park by bus.

Although generally positive about all the different aspects of travel by bus in the area, bus users were least satisfied with value for money (mean score 6.9 on a scale of 0 to 10 were 0 = very dissatisfied and 10 = very satisfied). Bus customers were most positive the length of time the journey took (mean score of 8.3), the ease of getting on and off the bus (mean score 8.7), length of time waited for the bus (mean score 8.1) and the convenience of bus stops (mean score 8.3).

Figure 62: Satisfaction with aspects of bus travel in the area
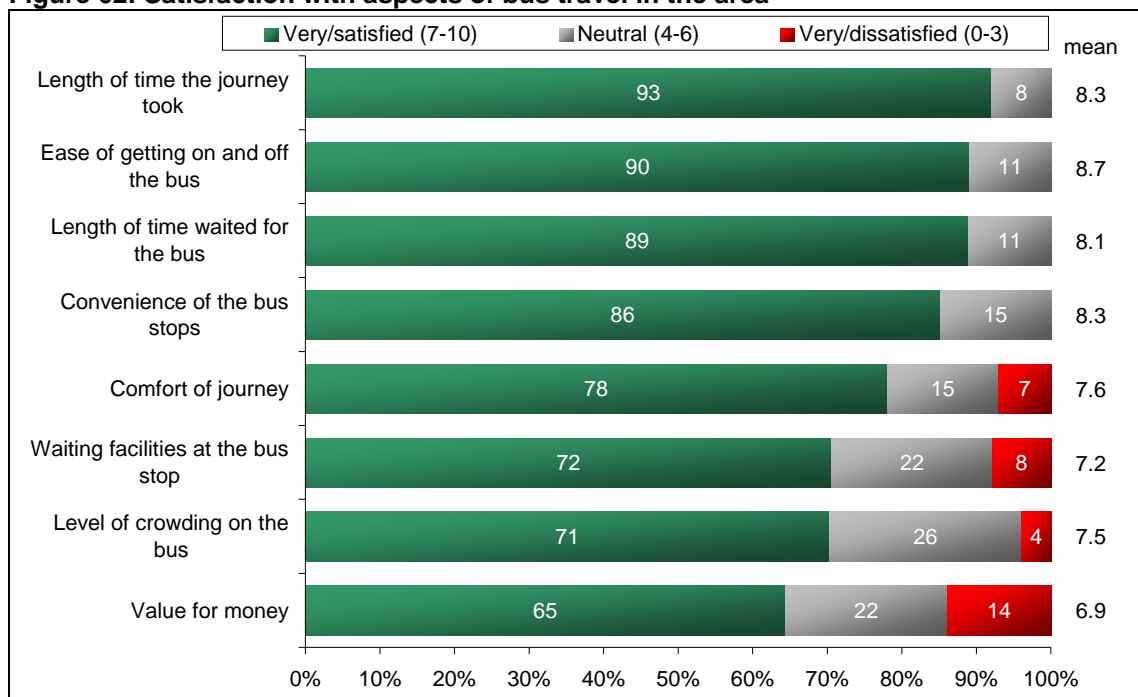
Base: 28 who travelled by bus to Tottenham Hale

Analysis by type of town centre shows that those in the Tottenham Hale Retail Park have the highest satisfaction scores for all aspects except 'waiting facilities at the bus stop', 'comfort of journey' and 'value for money'.

Table 39: Summary of means scores for aspects of travel by bus in area by town centre

	Retail Park	Total	Outer London
Ease of getting on and off the bus	8.68	7.98	8.26
Convenience of the bus stops	8.32	7.71	8.06
Length of time the journey took	8.29	7.46	7.76
Comfort of journey	7.57	7.40	7.61
Length of time waited for the bus	8.07	7.20	7.47
Waiting facilities at the bus stop	7.18	7.08	7.19
Level of crowding on the bus	7.50	7.00	7.14
Value for money	6.89	6.83	7.36

Mean scores calculated on a scale from 0 very dissatisfied to 10 very satisfied
Grey shading indicates highest score.

4.7 Attitudes towards Retail Park

Visitors were asked in what way the area could be improved. The suggestions most often mentioned were 'better range of shops' (mentioned by 49%) and to 'improve shops/better quality shops' (30%).

One in five respondents (21%) thought that there was nothing that could be done to improve the retail park.

When asked what the single most important improvement to be made was, 'better range of shops' was the main priority as shown in Table 40.

Table 40: Priorities for improvements to the area

	All respondents	
	All mentions %	Most important %
Nothing	21	-
Better range of shops	49	22
Improve shops/better quality shops	30	8
More leisure facilities	25	9
More shops	23	9
More public spaces	16	2
Longer shop opening hours	16	5
Improve pedestrian environment	16	3
More pleasant/greener environment	12	4
Remove undesirable element/more policing	8	2
Reduce pollution	6	0
More/easier parking	5	2
Better bus service	5	1
Improve cycle facilities	1	0
Improve access to bus stop locations	1	0
Other	15	12
base	**164**	**164**

4.8 Use of Other Shopping Centres

Tottenham Hale Retail Park visitors were asked whether they ever visit other shopping centres in and around London (as shown in a showcard). As shown in Figure 63, six in

ten do so, similar to the proportion for Outer London visitors (62%), but less than all respondents (70%). Nearly half (48%) visit Westfield Stratford, by far the most frequently mentioned other shopping centre.

Figure 63: Other shopping centres ever visited (prompted)
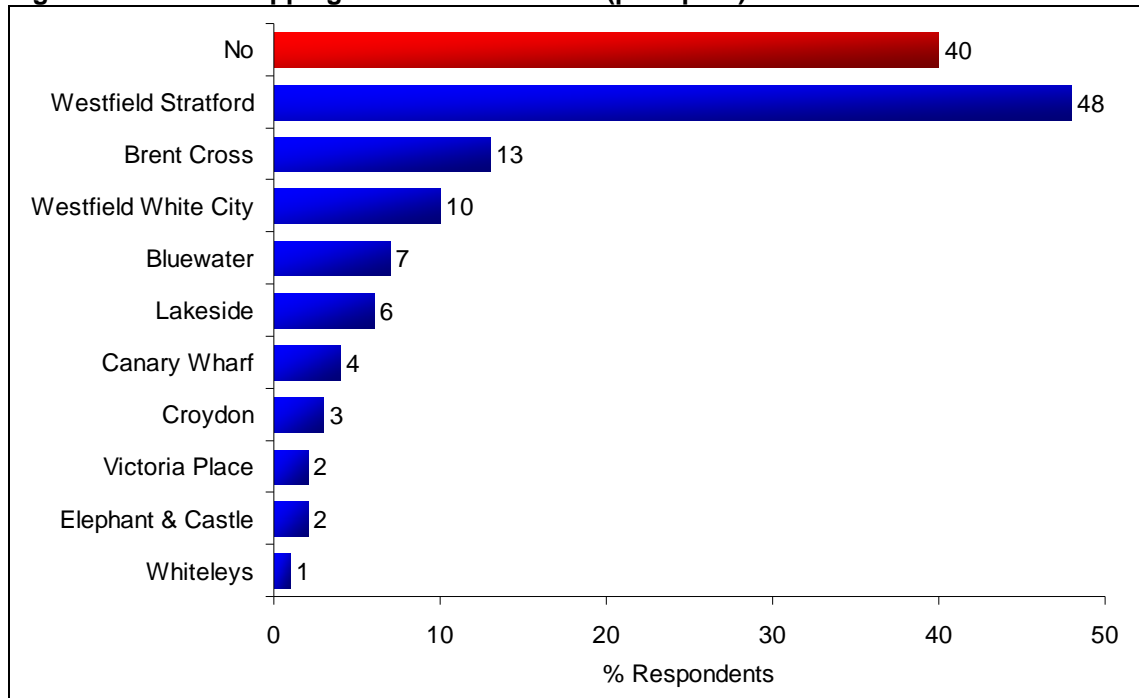
Base: Tottenham Hale: 164

Tottenham Hale Retail Park visitors are much more likely to go to Westfield Stratford (48%) than the total sample (34%) or Outer London visitors (21%), both of which are more likely to visit other shopping centres as well. For example 30% of the total sample and 29% of outer London visitors visit Westfield Stratford while the respective proportions visiting Lakeside are 17% and 16%.

Tottenham Hale Retail Park visitors who travelled by bus and those who walked were less likely to visit other shopping centres (39% and 54% respectively) than train/tube users (67%) and car users (72%).

4.9   Shopping and Expenditure in the Area

Respondents were shown a showcard and asked to indicate the range of thing they were shopping for or services they were using. As shown in Figure 64, Tottenham Hale Retail Park visitors were most likely to be shopping for clothing or footwear (35%), a similar proportion to those in outer London (39%). However, they were less likely to shop at Tottenham Hale Retail Park for food/groceries (33%) than those in outer London (42%), but more likely to be looking for stationery/books/CDs/DVDs/leisure goods (24%) and other household goods (18%) than those in outer London (11% and 9% respectively).

Figure 64: Range of things shopped for and services used

Category	% Respondents
Clothing or footwear	35
Food/groceries	33
Stationery/books/CDs/DVDs/leisure goods	24
Other household goods	18
Pharmaceuticals/toiletries	18
Eating in a café or restaurant	16
Major household goods	10
Take-away food	10
Luxury goods	7
Confectionery, tobacco, newspapers	6
Services	2
Wine, beer, spirits	2
Other	1
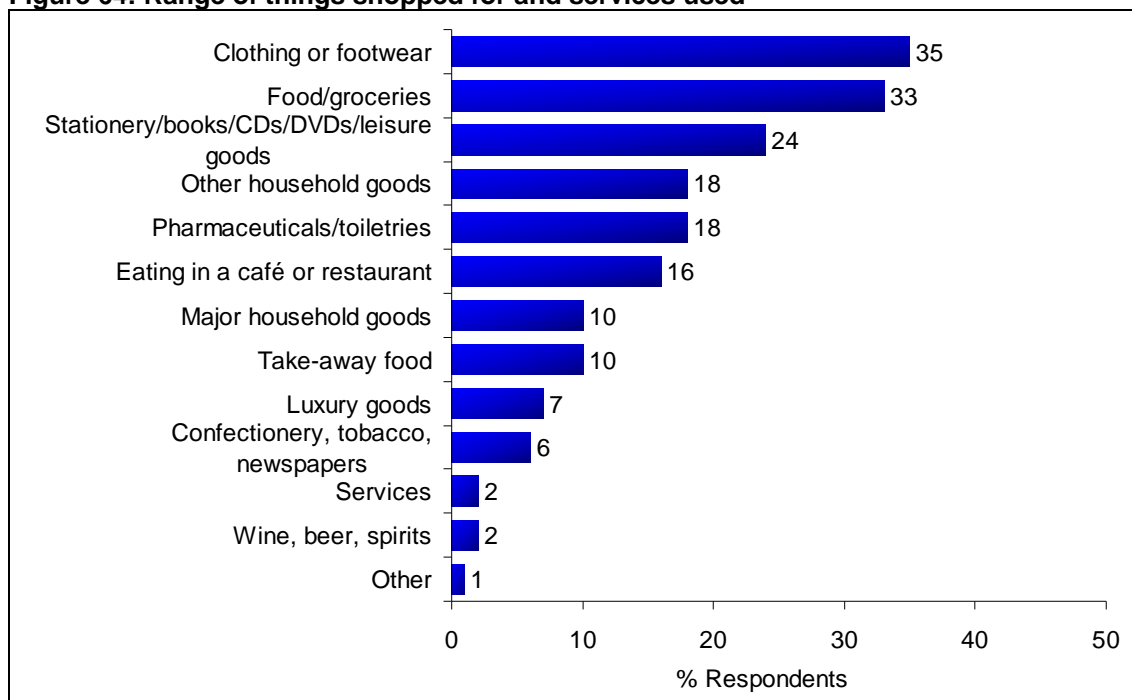
Base: Tottenham Hale: 164

Similar proportions went to Tottenham Hale Retail Park to eat in a café or restaurant as did visitors to outer London town centres (16% and 17% respectively).

4.10 Average Spend

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

Overall the average spend on the day of the interview was £41, the same as the average spend per visit (£41). The average spend per week was £42 and the average spend per month was £167.

Table 41: Average spend today, per visit and per week and per month

	Spend today %	Average spend per visit %	Average total spend per week* %	Average total spend per month* %
Nothing	1	3	3	3
Under £5	10	8	12	2
£5-£19.99	25	19	30	6
£20-£49.99	33	39	22	20
£50-£99.99	22	25	24	17
£100+	8	6	9	51
Mean	**£41**	**£41**	**£42**	**£167**
Base	**150**	**140**	**140**	**140**

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

Compared with the total and Outer London, visitors to Tottenham Hale Retail Park were slightly bigger spenders. They spent slightly more on the day and per visit than the total sample (£41 compared to £37 and £34 respectively), the same as Outer London visitors on the day (£41) and slightly more than outer London visitors on a typical visit (£41 compared to £35).

Table 42: Average spend today, per visit. per week and per month by type of centre

	Tottenham Hale Retail Park				Total				Outer London			
	Spend today %	Average spend per visit %	Average total spend per week* %	Average total spend per month* %	Spend today %	Average spend per visit %	Average total spend per week* %	Average total spend per month* %	Spend today %	Average spend per visit %	Average total spend per week* %	Average total spend per month* %
Nothing	1	3	3	3	5	2	2	2	5	1	1	1
Under £5	10	8	12	2	11	9	7	2	10	9	8	1
£5 - £19.99	25	19	30	6	31	33	21	5	27	31	23	5
£20 - £49.99	33	39	22	20	30	33	25	9	30	34	27	11
£50 - £99.99	22	25	24	17	15	14	25	15	18	16	26	16
£100+	8	6	9	51	8	6	19	68	10	5	15	65
Mean	**£41**	**£41**	**£42**	**£167**	**£37**	**£34**	**£69**	**£277**	**£41**	**£35**	**£60**	**£242**
Base[1]	**150**	**140**	**140**	**140**	**4,094**	**3,949**	**3,947**	**3,947**	**1466**	**1409**	**1,411**	**1,411**

[1] except refused and don't know

Spend by Mode

As found among the total sample, those who travelled by car were higher spenders on the day of the interview, spending an average of £64, higher than the average spend among all respondents (£41). In fact, six in ten car users spent £50 or more. The average spend among visitors to Tottenham Hale Retail Park who travelled by bus, train/tube or on foot was similar (£29, £32, £27 respectively). These figures are shown in Table 43.

Table 43: Average spend by mode on day

	Car %	Bus %	Train/Tube %	Walked %
Nothing	0	4	4	0
Under £5	8	8	16	13
£5 - £19.99	8	44	24	33
£20 - £49.99	25	28	40	45
£50 - £99.99	45	12	8	8
£100+	15	4	8	3
Mean	**£64**	**£29**	**£32**	**£27**
Base[1]	**53**	**25**	**25**	**40**

[1] except refused and don't know

A similar pattern was found in the average spend per visit, with 63% of car drivers/passengers spending an average of £50 or more per visit.

With respect to the overall average spend per visit, car drivers/passengers spend £60, (higher than the £46 average spend among the total sample), train/tube passengers £36, bus customers £29 and those who walk £29.

Table 44: Average spend by mode per visit

	Car %	Bus %	Train/Tube %	Walked %
Nothing	4	4	4	0
Under £5	4	12	8	11
£5 - £19.99	8	20	21	27
£20 - £49.99	21	52	38	54
£50 - £99.99	50	8	25	5
£100+	13	4	4	3
Mean	**£60**	**£29**	**£36**	**£29**
Base[1]	**48**	**25**	**24**	**37**

[1] except refused and don't know

On average, those who walk or are car drivers/passengers spend more per week (£54 and £51 respectively) than those who use the bus (£27) or travel by train/tube (£17).

Table 45: Average total spend per week by mode

	Car %	Bus %	Train/Tube %	Walked %
Nothing	4	4	4	0
Under £5	10	4	21	14
£5 - £19.99	23	48	50	16
£20 - £49.99	19	28	17	24
£50 - £99.99	31	12	8	32
£100+	13	4	0	14
Mean	**£51**	**£27**	**£17**	**£54**
Base[1]	**48**	**25**	**24**	**37**

[1] except refused and don't know

The total average spend per month by mode (see Table 46) shows that average spend is highest for those who walked (£215) or were a car driver/passenger (£206), followed by those who travelled by bus (£110) and those who used a train/tube (£67).

Table 46: Average total spend per month by mode

	Car %	Bus %	Train/Tube %	Walked %
Nothing	4	4	4	0
Under £5	2	0	8	0
£5 - £19.99	4	4	8	8
£20 - £49.99	19	28	33	11
£50 - £99.99	15	24	25	11
£100+	56	40	21	70
Mean	**£206**	**£110**	**£67**	**£215**
Base[1]	**48**	**25**	**24**	**37**

[1] except refused and don't know

It should be noted that visitors may use a number of different modes to access the area, but this calculation is based on the mode used on the day of the interview.

4.11 Online Shopping

Just under half (48%) of Tottenham Hale Retail Park visitors shop by internet, slightly lower than among all respondents (52%) and Outer London visitors (53%). Car users were the most likely to do so (59%) and bus users least likely (32%). Around four in ten of those who travelled by train/tube (41%) and on foot (44%) do so.

Three quarters (76%) of those who shop online buy books/CDs/DVDs/leisure goods and a similar proportion (73%) buy clothing or footwear.

Figure 65: Goods shopped for online
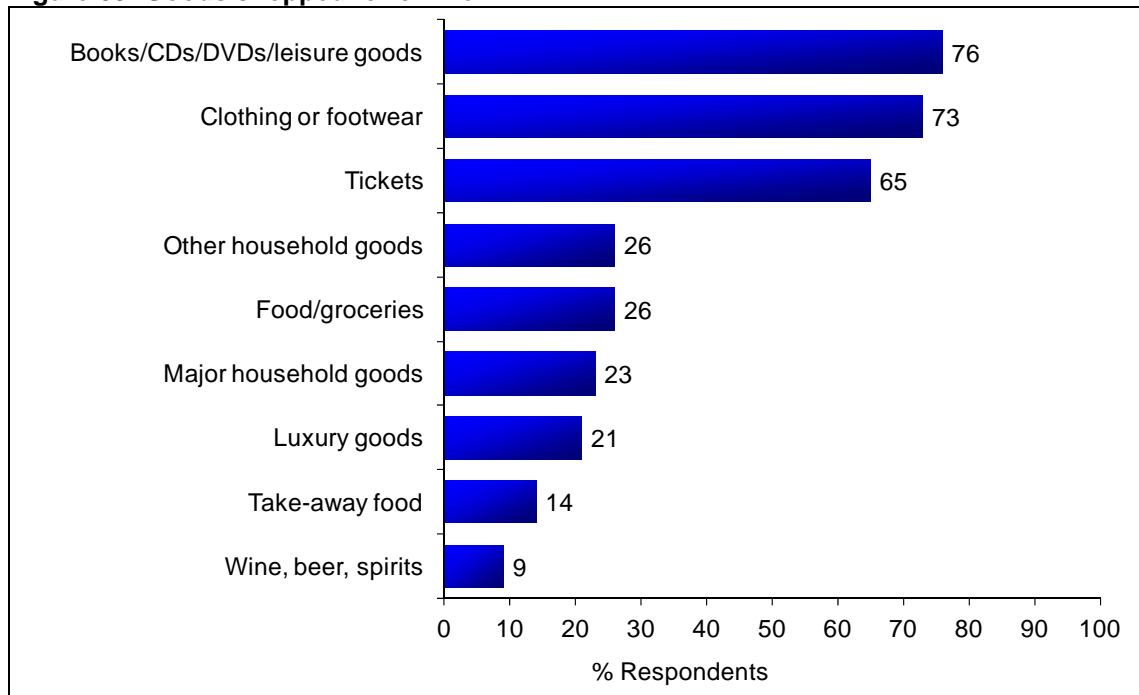
Base: 78 Tottenham Hale visitors who shop on online

While Tottenham Hale Retail Park visitors were less likely to shop online than those visiting outer London centres, they were more likely to purchase a wider range of types of goods online. For example, 76% of Tottenham Hale Retail Park visitors buy books/CDs/DVDs/leisure goods compared with 65% of Outer London visitors and the respective figures for clothing/footwear are 73% and 62%.

Figure 66 shows a comparison of the type of goods shopped for online and in the Tottenham Hale Retail Park. As with the total sample and Outer London visitors, online predominates for books/CDs/DVDs/leisure goods, clothing/footwear, tickets, household goods and luxury goods. The retail park predominates for food/groceries.

Figure 66: Comparison of goods shopped for online and in Tottenham Hale Retail Park
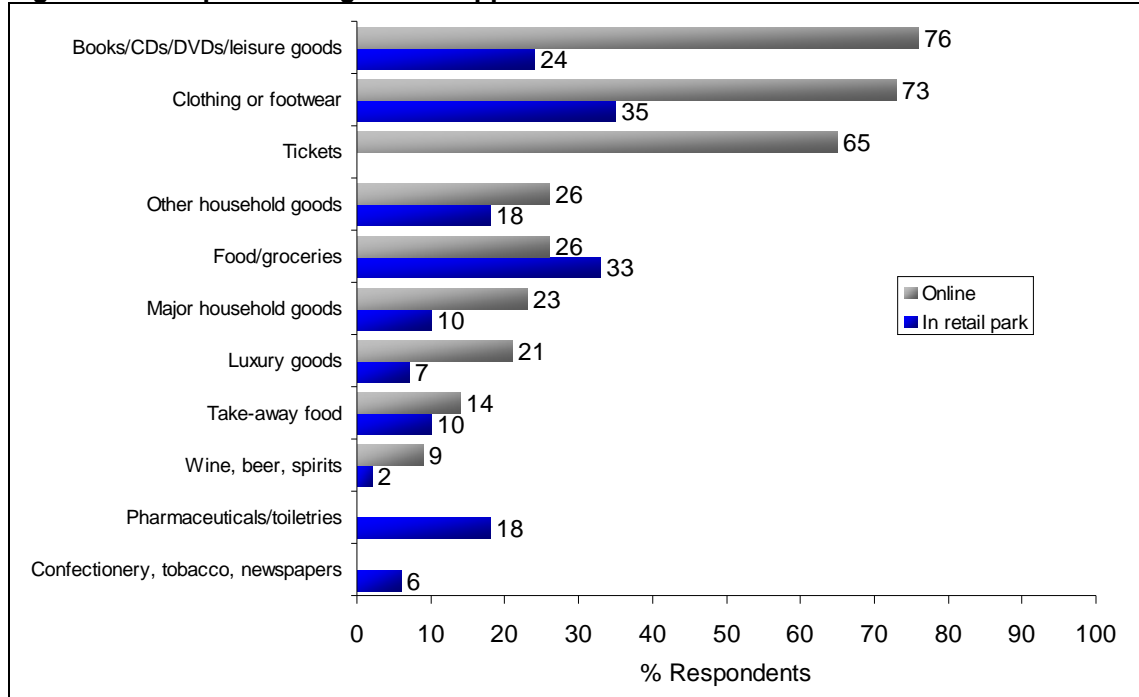
Base: 78 Tottenham Hale visitors who shop online and 164 who shop in the retail park

4.12 Respondent Characteristics

Gender

Just over half (53%) of Tottenham Hale Retail Park visitors were female, fewer than the total sample (58%) and Outer London visitors (63%).

Age

There was a spread of ages for the Tottenham Hale Retail Park sample, with roughly similar proportions in the four age groups under 55 years.

Figure 67: Age
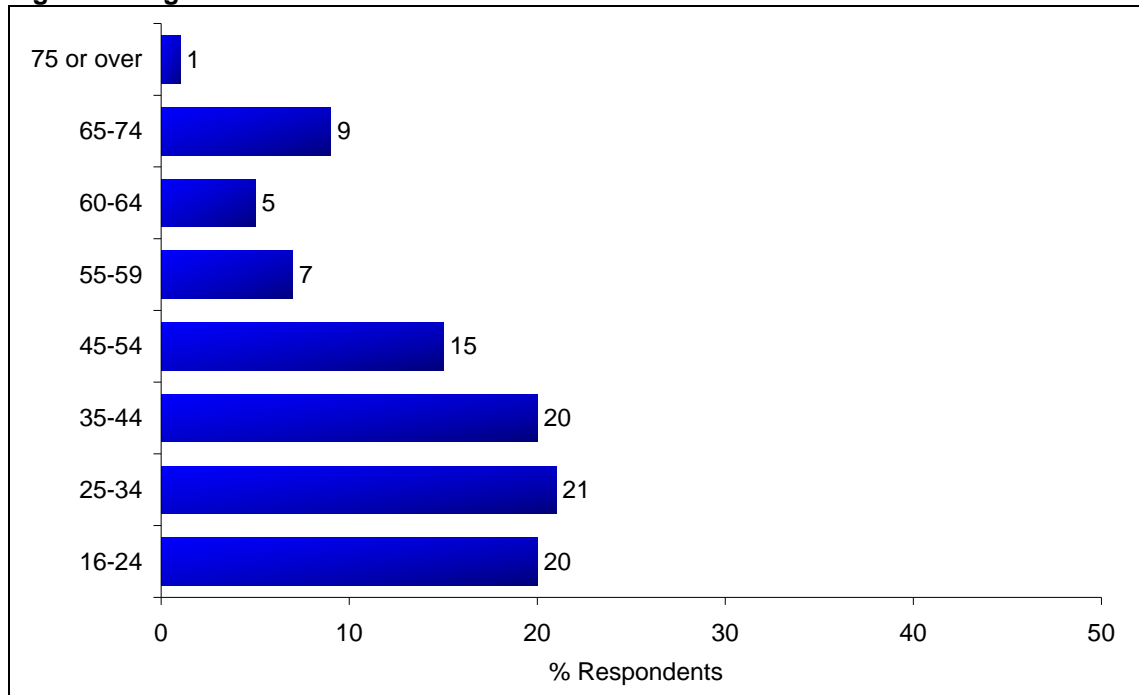
Base: Tottenham Hale: 164

The age profile of visitors to Tottenham Hale Retail Park was similar to that of the total and Outer London town centres as shown in Figure 68 below.

Figure 68: Age by type of centre
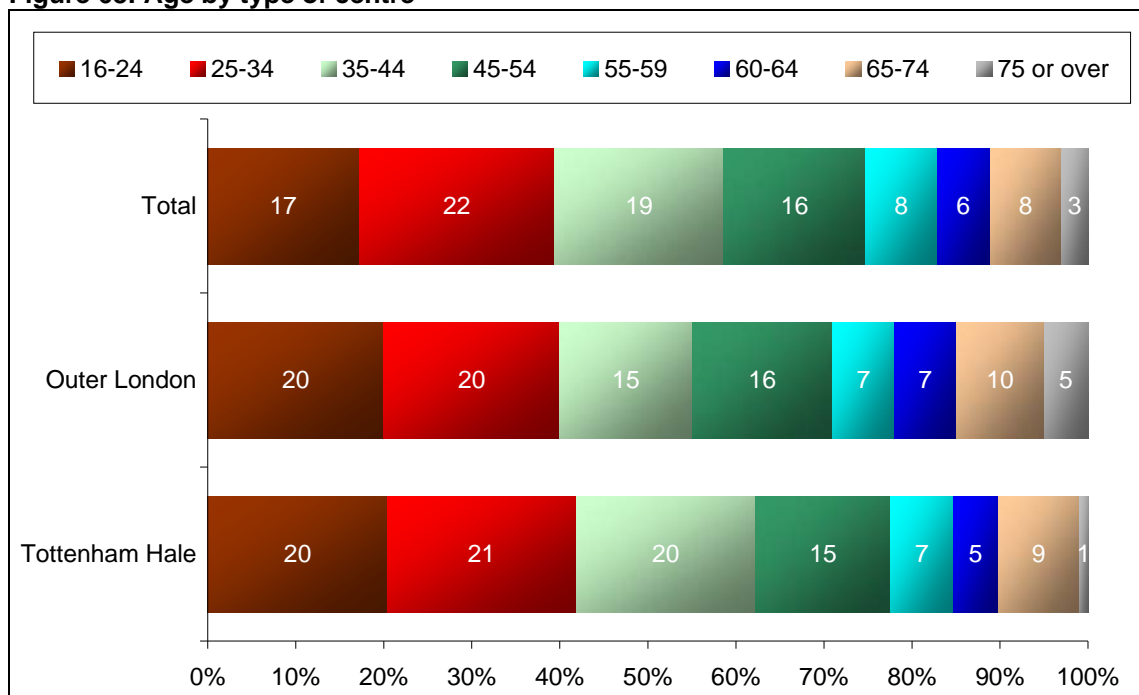
Base: Tottenham Hale 164; Outer London 1,515; Total 4,185

Ethnicity

Just over half of the sample (55%) is from a White background, 17% from an Asian background and 15% from a Black background as shown in Figure 69 below.

Figure 69: Ethnicity
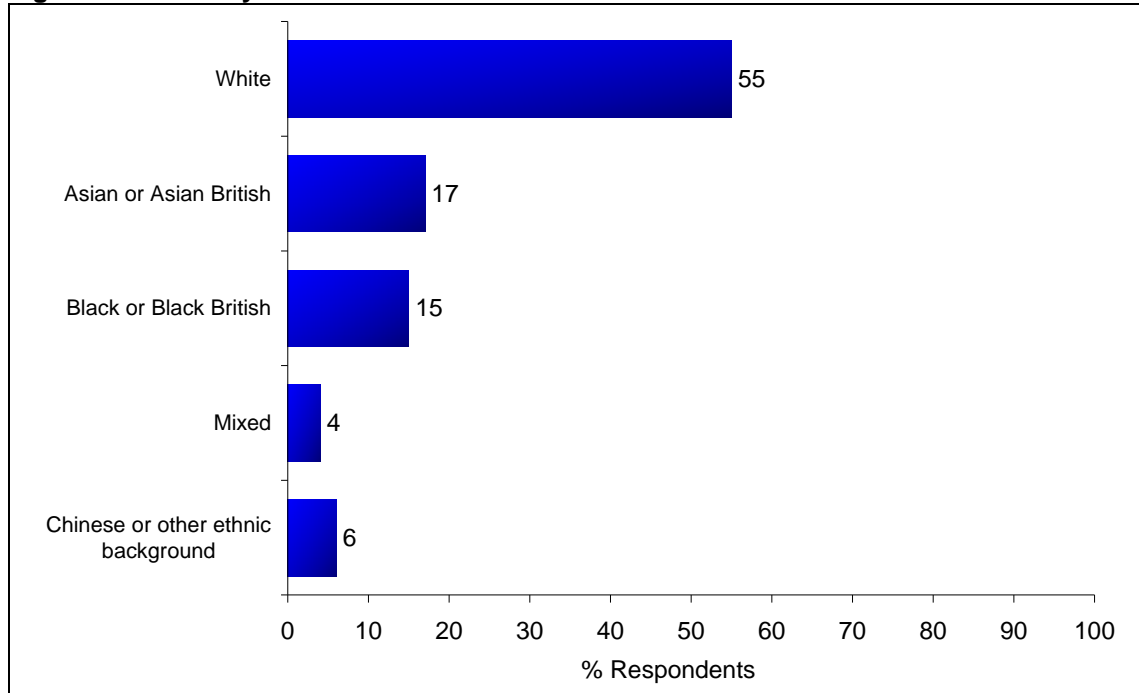
Base: Tottenham Hale: 164

Analysis by type of town centres shows that Tottenham Hale Retail Park has a higher proportion of non-White visitors than Outer London town centres or the total; 55% of visitors to Tottenham Hale are White, compared with 65% of the total and 77% of those visiting Outer London centres.

Figure 70: Ethnicity by type of centre
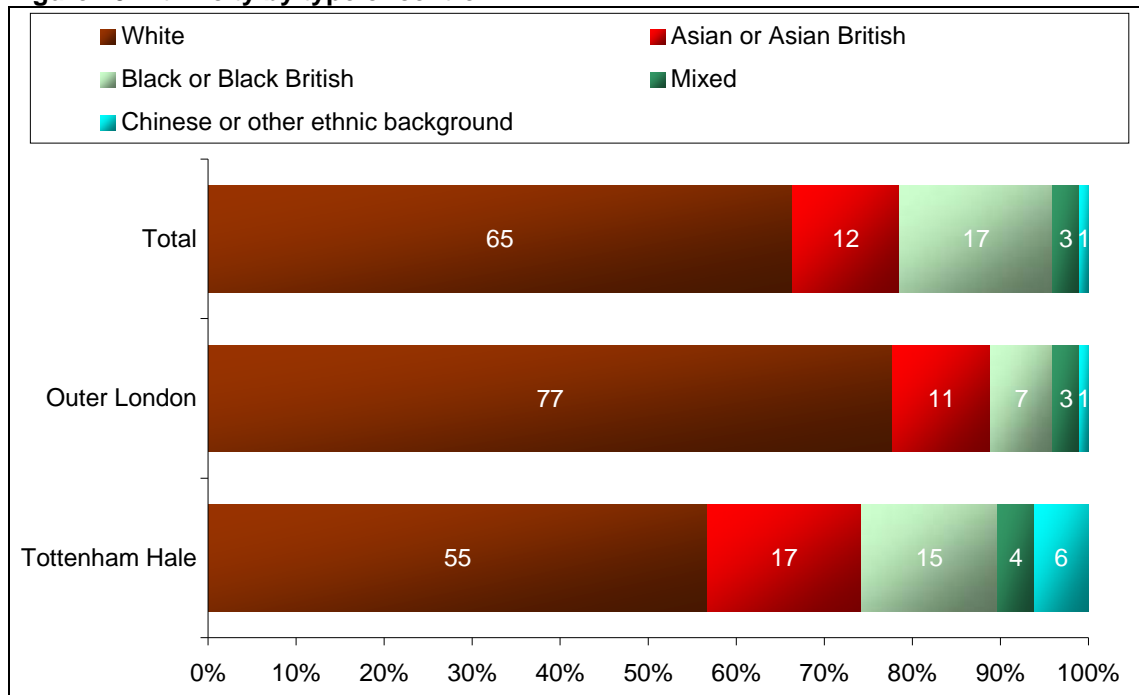
Base: Tottenham Hale 164; Outer London 1,515; Total 4,185

Employment status

Most of those who took part in the survey were employed either full time (54%) or part time (7%). Fifteen per cent were retired and 10% were full time students.

Figure 71: Employment status
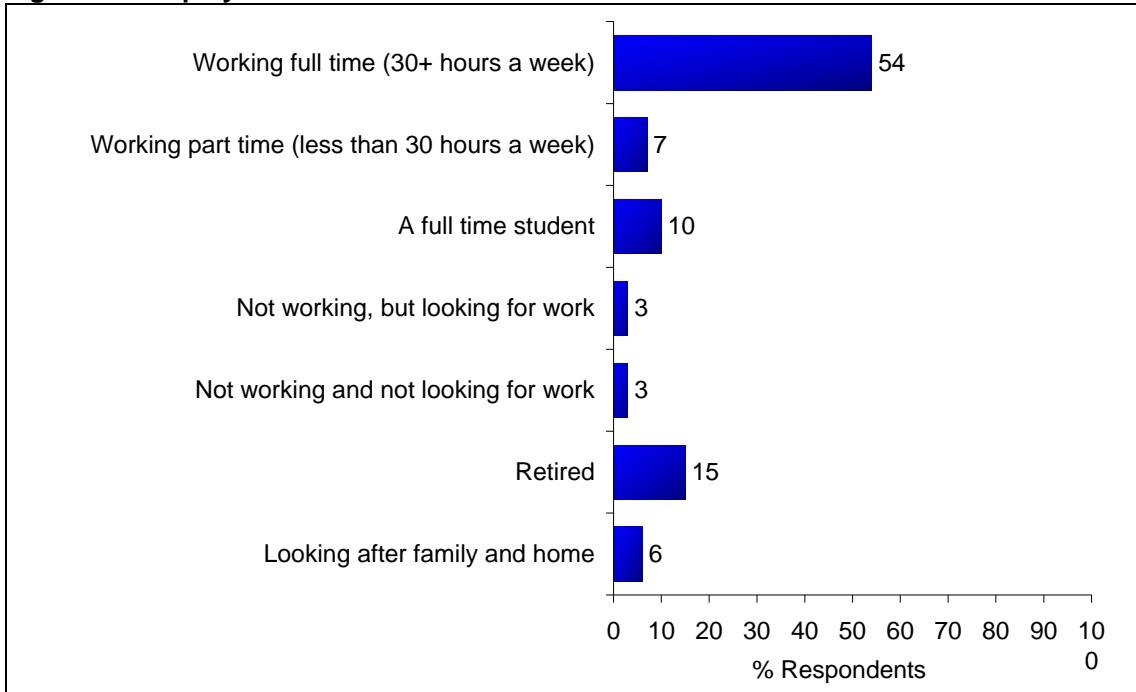
Base: Tottenham Hale: 164

Those in Tottenham Hale Retail Park were the most likely to be employed full time; more than half (54%) of those surveyed at the retail park were employed full time, compared with 45% of the total and 41% of those surveyed in an Outer London town centre. However, they were less likely to be working part time when compared with other centres.

Figure 72: Employment status by type of centre
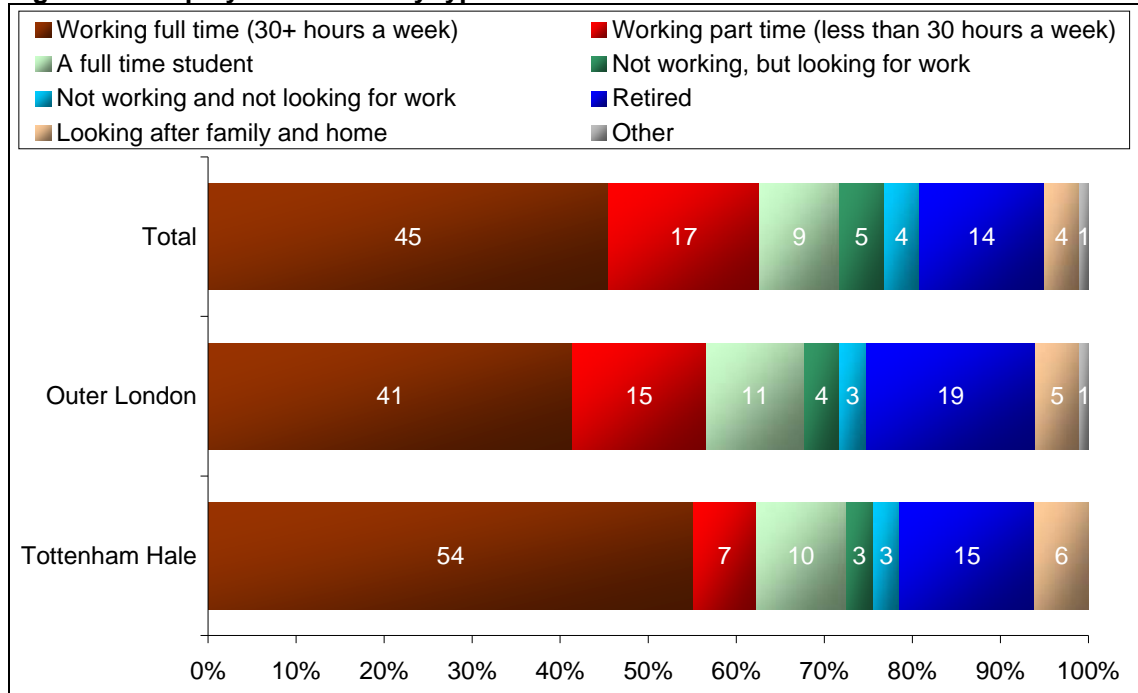
Base: Tottenham Hale 164; Outer London 1,515; Total 4,185

Household income

Over half the Tottenham Hale Retail Park sample (56%) said they were the chief income earner of the household. This proportion was slightly higher than for the total (51%) and those surveyed in Outer London (47%).

Table 47: Whether chief income earner of household by type of centre

	Tottenham Hale %	Total %	Outer London %
Yes, respondent is Chief Income Earner	56	51	47
No, someone else	40	46	50
Refused	1	2	2
Base	**164**	**4,185**	**1,515**

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

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

Table 48: Gross annual household income before deductions by type of centre

	Tottenham Hale %	Total %	Outer London %
Under £5,000	0	2	3
£5,000-£9,999	1	4	4
£10,000-£14,999	5	5	4
£15,000-£19,999	7	5	4
£20,000-£24,999	7	6	4
£25,000-£34,999	15	10	8
£35,000-£49,999	10	10	10
£50,000-£74,999	5	8	9
£75,000-£99,999	1	3	3
£100,000 or over	0	2	2
Don't know	18	21	22
Refused	28	24	25
Base	**164**	**4,185**	**1,515**

Household size

The median household size was three, representing 27% of households. Twelve per cent of respondents lived alone.

Figure 73: Number of people in household
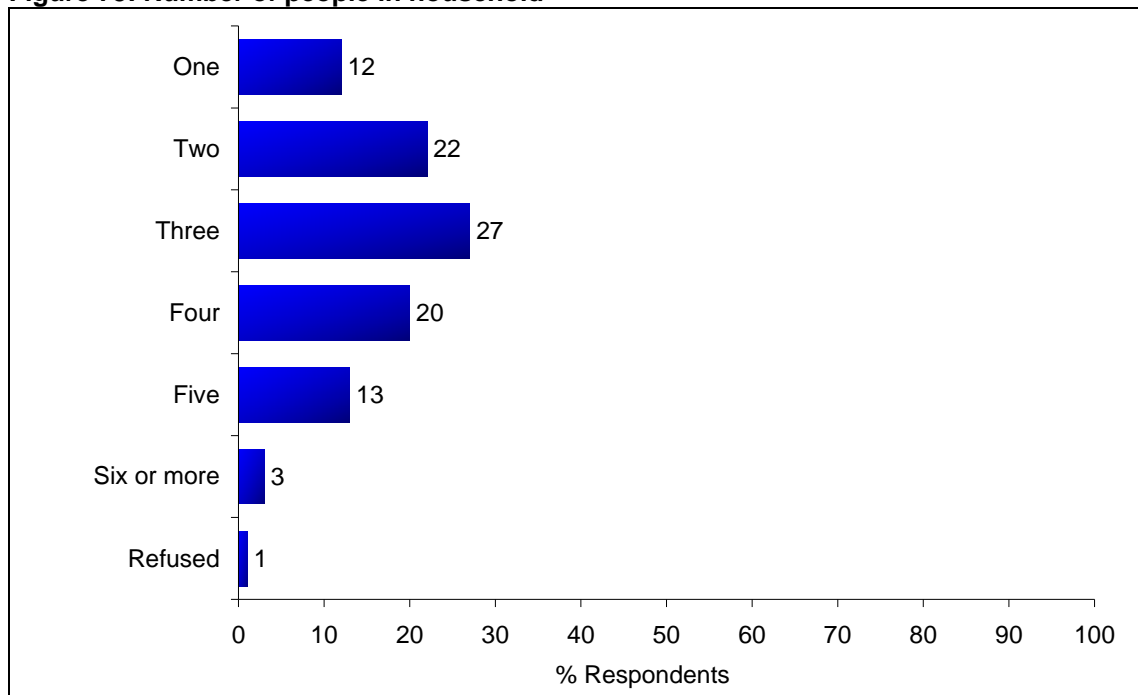
Base: Tottenham Hale: 164

Visitors to Tottenham Hale Retail Park were less likely to live alone; 12% lived alone compared with 16% of the total and 17% of visitors to Outer London town centres.

Figure 74: Number of people in household by type of centre
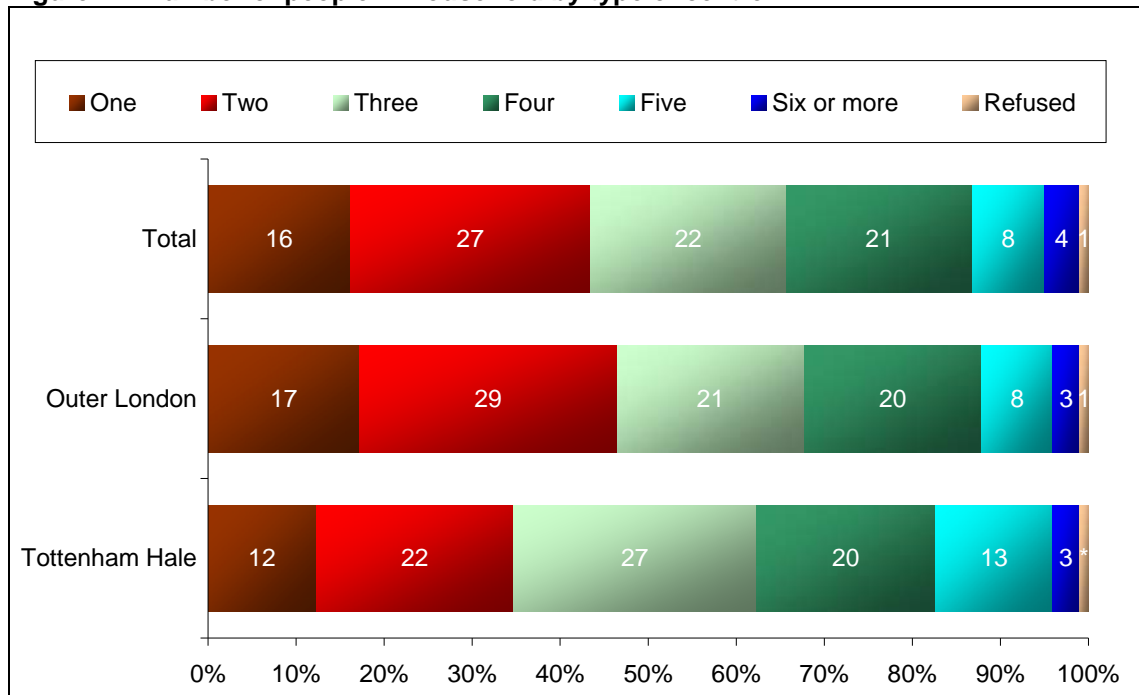
Base: Tottenham Hale 164; Outer London 1,515; Total 4,185

Access to a Car

Less than half of those surveyed at Tottenham Hale Retail Park (42%) said they had access to a car that they could have used to travel to the retail park.

Car access was higher in the Outer London town centres (53%) than in Tottenham Hale Retail Park (although a much higher proportion at Tottenham Hale Retail Park actually used the car to access the area on the day of interview).

Figure 75: Access to a car by type of centre
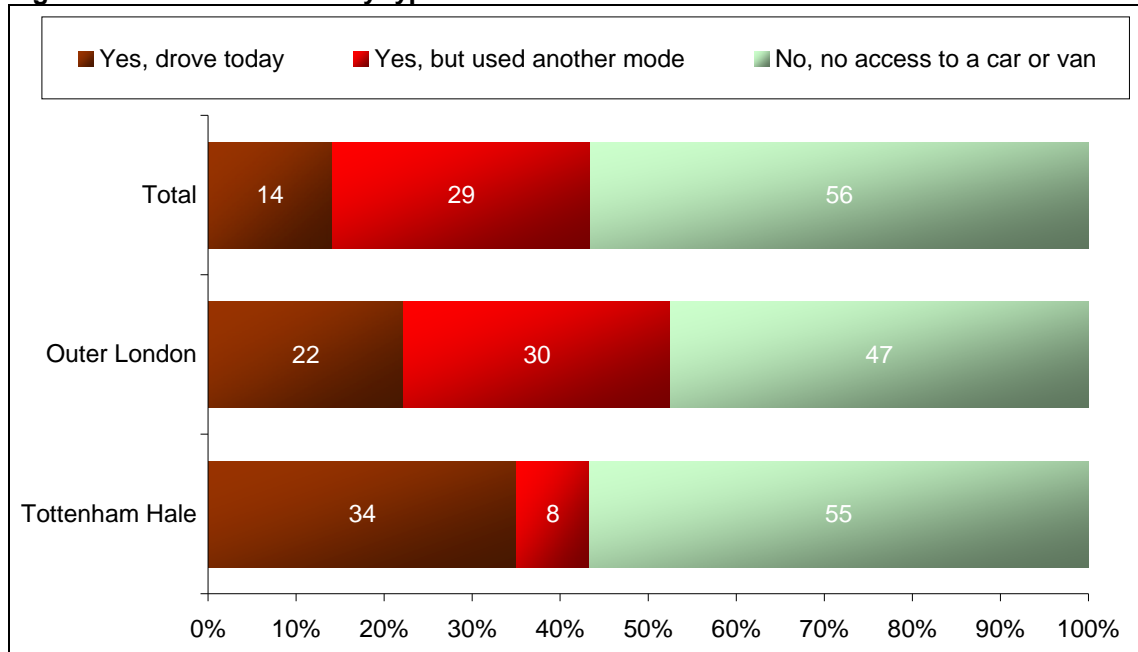
Base: Tottenham Hale 164; Outer London 1,515; Total 4,185

Where visitor lives

Overall, 90% of Tottenham Hale Retail Park visitors lived in London: 26% in Inner London Boroughs[20] and 54% in Outer London Boroughs (mostly Haringey).

A relatively large proportion of Tottenham Hale Retail Park visitors come from Inner London compared to the overall Outer London town centres sample.

Figure 76: Where live by type of centre
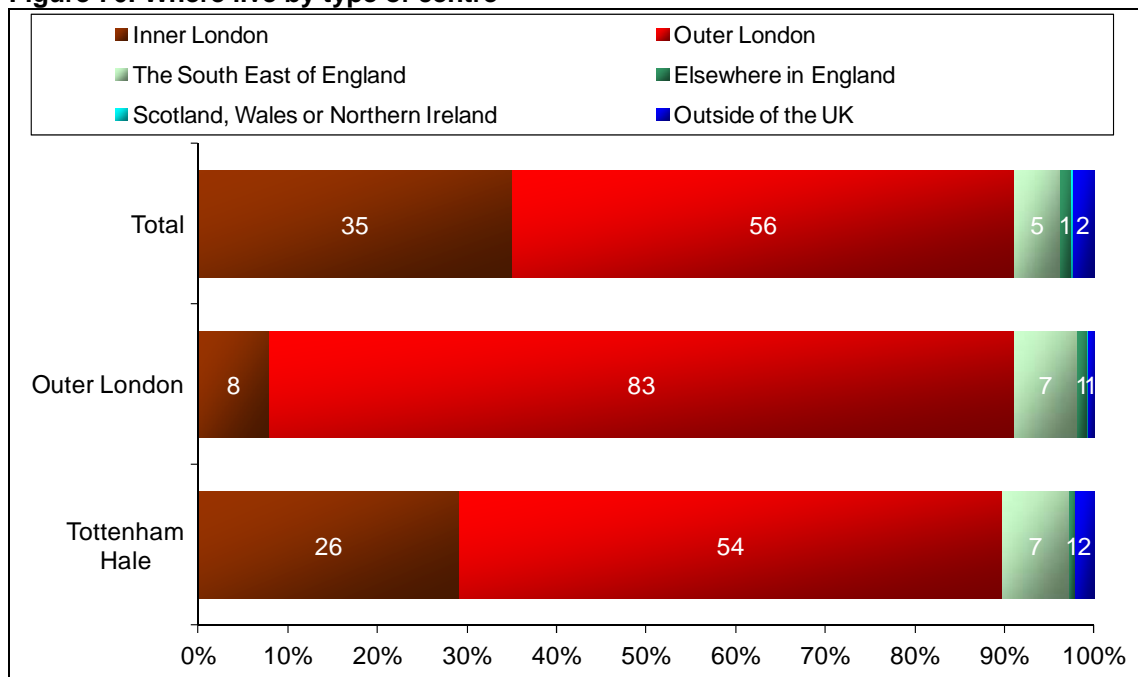
Base: Tottenham Hale 164; Outer London 1,515; Total 4,185

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

Physical and Mental Impairments

Eight per cent of the Tottenham Hale Retail Park sample had a long-term physical or mental disability which limits daily activities or work they could do.

Table 49: Long term physical or other impairment which limits daily activities or the work that can be done, including problems due to age by type of centre

	Tottenham Hale %	Total %	Outer London %
No, none	92	93	91
Mobility impairment	4	4	6
Visual impairment	0	1	1
Hearing impairment	2	1	1
Learning disability	1	*	1
Mental health condition	0	1	1
Serious long term illness	2	1	1
Other	0	*	1
Base	**164**	**4,171**	**1,507**

* = less than 0.5%

One per cent of the Tottenham Hale Retail Park sample uses a wheelchair, the same proportion as in Outer London. Less than 0.5% of the overall sample do so.

Ninety five per cent found it easy or very easy to move around the area.

Table 50: Ease of moving around the area

	Tottenham Hale %	Total %	Outer London %
very easy	72	63	71
easy	23	32	23
neither easy nor difficult	2	3	3
difficult	3	2	1
very difficult	0	0	0
Base	**164**	**4,171**	**1,507**

Whether carrying anything

Over half of the Tottenham Hale Retail Park visitors were carrying shopping bags or using a shopping trolley (56%) and 7% had a buggy or pram.

Table 51: Whether respondent carrying anything

	Tottenham Hale %	Total %	Outer London %
Shopping bag(s)/shopping trolley	56	55	57
Buggy/pram	7	2	3
Carrying a child/baby	3	1	1
Suitcase/rucksack	1	7	6
Other large/awkward object	1	1	1
Nothing	38	37	36
Base	**164**	**4,171**	**1,507**

5. HACKNEY

5.1 Introduction

At Hackney town centre, because of the planned pedestrianisation of Narrow Way leading to the rerouting of some buses some additional research was undertaken. This comprised:

- A booster of 150 interviews to the visitor survey and some additional questions
- Fifteen interviews with retail and catering outlet managers in the town centre
- An interview with the Town Centre Manager.

The key findings of these are reported on below. It should be noted that 'after' surveys are planned for the Autumn of 2013 and the key interest will be in the change of behaviour and attitudes following the pedestrianisation of Narrow Way. Therefore, much the reporting for this stage is mainly to highlight existing behaviours and attitudes.

5.2 Visitor Survey Additional Questions

The data on Hackney town centre visitors is subsumed within the main findings in Chapter 3 with town centre specific data shown in Appendix B.

There were some additional questions for Hackney town centre respondents which were intended to focus on the impact of the pedestrianisation of Narrow Way specifically with respect to access by bus users.

These are:

- For bus users:
  - bus number used
  - Which stop got off at
  - Satisfaction with the amount of time it took to walk from the bus stop to where you wanted to go today'
- Which roads visited or planned to visit.

Bus Usage

Two hundred of the 463 Hackney respondents used a bus to access the town centre. The main bus numbers used were the 30, 38, 55, 106 and 254:

	%
• 30	18
• 38	10
• 55	10
• 106	10
• 254	10
• 253	9
• 48	7
• 242	7
• 277	6
• 276	5
• D6	5
• 236	4
• 394	3
• W15	1

Base: 200 who used bus to visit area

Bus users were shown the map below and asked at which bus stop they got off.
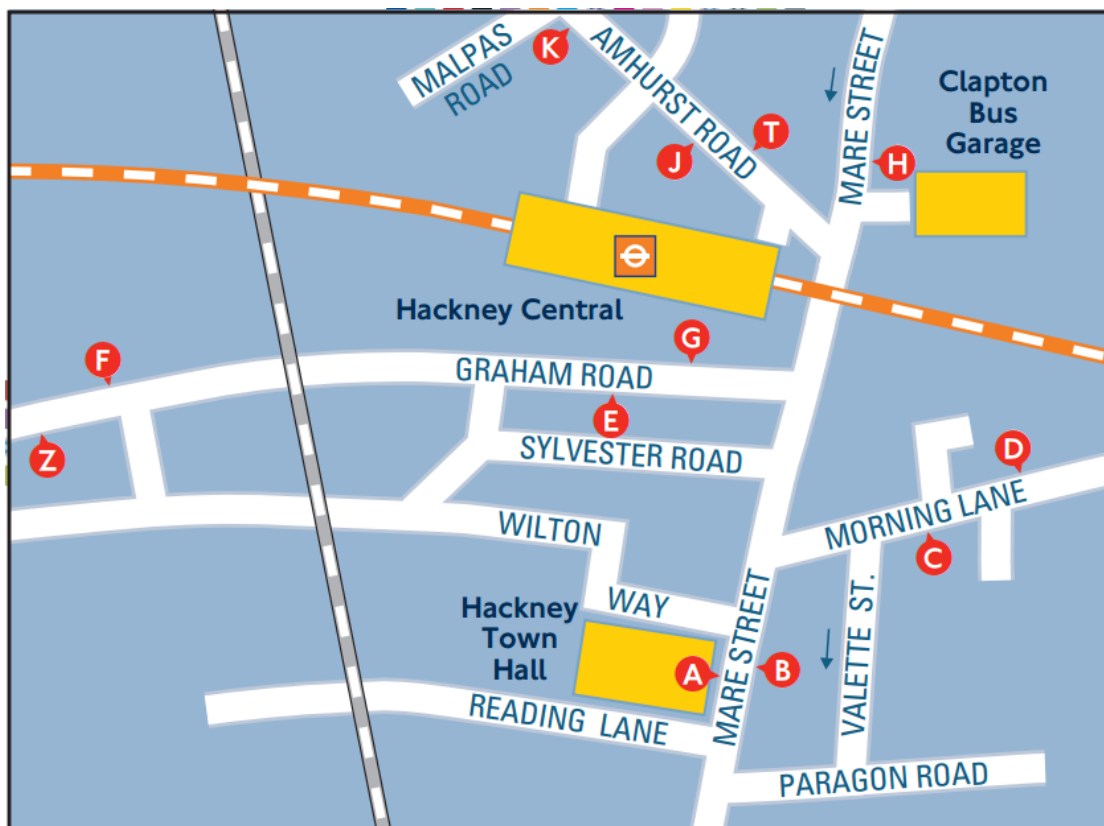
The main bus stops used were H (at the bottom of Narrow Way), A and B (at the bottom of Mare Street, near the town hall) and J (on Amhurst Road):

	%
• H	24
• A	19
• B	13
• J	12
• G	7
• T	7
• E	5
• D	4
• K	4
• F	3
• C	2
• Z	1
• Bus stop not on map	2

Base: 200 who used bus to visit area

The satisfaction with the amount of time it took to walk from the bus stop to where they wanted to go today on a scale of 0 to 10 were 0 = very dissatisfied and 10 = very satisfied was probed. Overall, 65% were satisfied or very satisfied. The mean score was 7.1.

Figure 77: Satisfaction with the amount of time it took to walk from the bus stop to where they wanted to go today
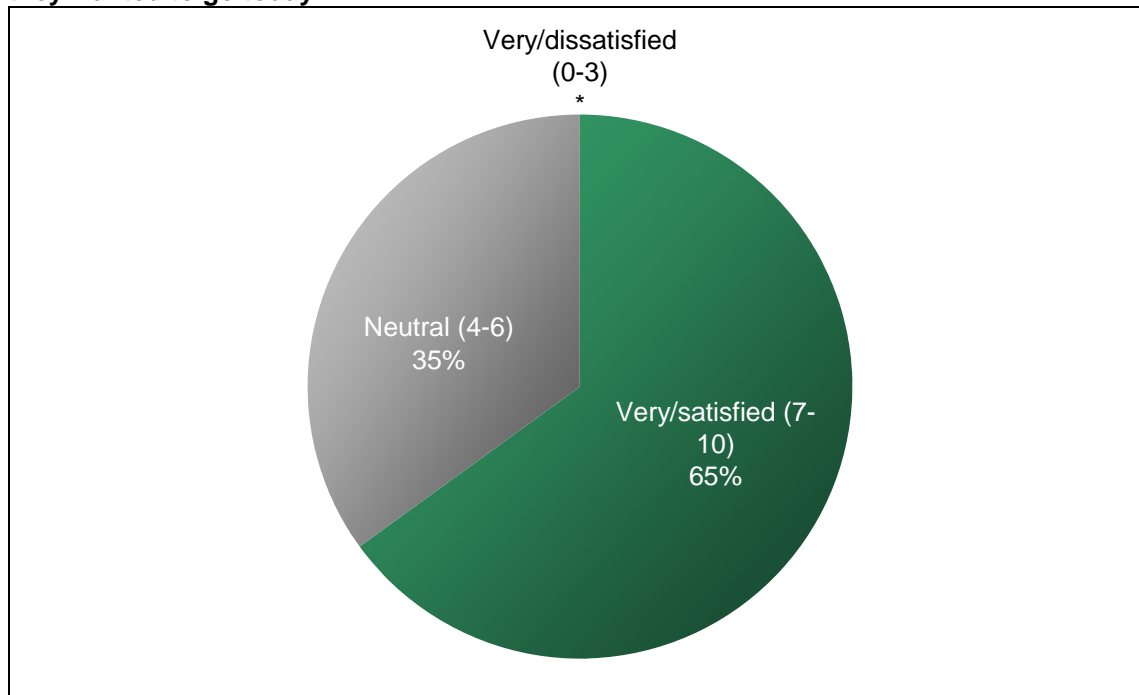
Base: 200 who used bus to visit area

Which roads visited or planned to visit

Visitors to Hackney town centre were shown the map below and asked which of the six marked roads they had visited or planned to visit. More than one road could be mentioned so percentages sum to more than 100%.

Over six tenths (61%) visited or planned to visit Mare Street (south) and 55% Mare Street (north)/Narrow Way. Nearly a third (31%) visited or planned to visit Amhurst Road.

	%
• Mare Street (south)	61
• Mare Street (north)	55
• Amhurst Road	31
• Morning Lane	23
• Graham Road	12
• Dalston Lane	7

Base: 462

5.3 Business Interviews

Fifteen interviews were undertaken face-to-face with managers of retail and catering establishments in Mare Street (both the northern part 'Narrow Way' and the southern part).

This section sets out the key findings from those interviews. As the sample size is only fifteen we show numbers and not percents.

Nature of Business

Eight interviews were conducted with managers of catering establishments while the remaining seven interviews were conducted with retail managers.

Eleven out of the 15 establishments at which interviews were conducted at, had less than ten employees.

- Sole trader   1
- 2 – 4   4
- 5 – 9   6
- 10 – 20   2
- 20+   2

Five establishments had been at their address in Hackney for ten years or more and a further five had been based at their address for between five and ten years. Two businesses had only been at their current address for less than one year.

- Less than 1 year   2
- 1 to 2 years   2
- 2 to 5 years   1
- 5 to 10 years   5
- 10 to 20 years   4
- Over 21 years   1

Access

The majority of respondents thought that 'most' of their customers travelled to the area by bus or on foot. Ten respondents thought that 'most' customers travelled to the area by bus while seven thought that 'most' would travel by foot (ie they live and/or work locally). Nearly all respondents thought that 'very few' customers would travel to the area by car while eight respondents thought that 'very few' would arrive by bicycle.

Table 52: How customers travel to the area

	Most	Some	Very Few	None
Car	0	1	14	0
Bus	10	5	0	0
Bicycle	0	3	8	4
On foot	7	6	2	0

None of the establishments at which interviews were conducted had off street parking for customers, staff, deliveries or visitors.

Eight out of the fifteen respondents said that vehicles visiting their premises would park in a car park.

- Side road   1
- Car park   8
- Other   6

There was high dissatisfaction with the number of parking spaces provided in the Hackney area; fourteen out of fifteen respondents were either 'very dissatisfied' or 'dissatisfied'.

Attitudes towards ease of access to the area by car were typically negative. Ten out of fifteen were either 'very dissatisfied' or 'dissatisfied' with the ease of access by car. Satisfaction was high for ease of access to the area by bus.

Table 53: Satisfaction with number of parking spaces and ease of access to the area by car and bus

	Satisfaction with number of parking spaces provided in area	Satisfaction with ease of access to area by car	Satisfaction with ease of access to area by bus
Very dissatisfied	12	9	0
Dissatisfied	2	1	0
Neither	1	1	0
Satisfied	0	4	8
Very Satisfied	0	0	7

Satisfaction with the bus service was generally very high. All respondents were either 'satisfied' or 'very satisfied' with the frequency of buses, location of bus stops, information provision on bus stops and the condition of bus stops.

Table 54: Satisfaction with bus service in Hackney

	Frequency of buses	Speed of travel on the bus	Location of bus stops	Information provision on bus stops	Condition of bus stops
Very dissatisfied	0	0	0	0	0
Dissatisfied	0	1	0	0	0
Neither	0	1	0	0	0
Satisfied	4	4	3	5	4
Very Satisfied	11	9	12	9	11
Not stated				1	

Attitudes to the area

When asked to think about driving in the area, the majority (ten out of fifteen) were 'satisfied' or 'very satisfied' with the speed of travel in Hackney. However, in terms of the location and number of places to park, a high proportion (twelve out of fifteen) were either 'dissatisfied' or 'very dissatisfied'.

Table 55: Satisfaction with driving in Hackney

	Speed of travel, congestion and delays	Location and number of places to park
Very dissatisfied	1	7
Dissatisfied	2	5
Neither	2	0
Satisfied	6	0
Very Satisfied	4	3

Satisfaction was high in terms of walking around Hackney. Respondents were generally satisfied with the width of the pavement, the availability of seating, the number and the suitability of pedestrian crossings and with the ease of movement within the area. Three out of the fifteen respondents, however, were dissatisfied the availability of seating.

Table 56: Satisfaction with walking in Hackney

	Width of pavement	Availability of seating	Number and suitability of pedestrian crossings	Ease of movement within area
Very dissatisfied	0	0	1	0
Dissatisfied	1	3	0	0
Neither	0	1	0	2
Satisfied	7	7	9	10
Very Satisfied	7	4	5	3

Satisfaction with the area as a whole was generally high, particularly so for the plants and trees along the street, the risk of accident on the road, the spaces to meet people and chat, the cleanliness of the area and the range of local shopping and other facilities (eg post office, newsagents, cafes etc.) – at least ten out of the fifteen respondents were either 'satisfied' or 'very satisfied' with these areas.

Satisfaction was lowest for the noise and air quality of the area.

Table 57: Satisfaction with the area as a whole

	Attractiveness of the area	Air quality	Noise	Plants and trees along the street	Risk of accident on the road
Very dissatisfied	1	1	1	2	2
Dissatisfied	3	4	6	1	1
Neither	2	4	2	0	2
Satisfied	7	3	5	9	6
Very Satisfied	2	2	1	3	4
Not Stated		1			

Table 58: Satisfaction with the area as a whole

	Spaces to meet people and chat	Range of local shopping and other facilities	Attractiveness and quality of local shopping and other facilities	Cleanliness and freedom from litter of the pavement
Very dissatisfied	2	2	3	1
Dissatisfied	1	2	1	2
Neither	0	0	2	1
Satisfied	9	10	8	9
Very Satisfied	3	1	0	2
Not Stated			1	

How local area can be improved

Despite high satisfaction with the range of local shops and other facilities, a better range and an improved quality of shops were two of the three most frequent suggestions made by respondents to improve the local area. A high proportion of respondents also expressed a desire for more and easier parking.

- Better range of shops 12
- More/easier parking 9
- Improve shops/better quality shops 6
- Cleaner streets 5
- Remove undesirable element/more policing 5
- Less traffic 4
- Improved cycle facilities 4
- More shops 3
- More leisure facilities (eg restaurants, bars, cinemas etc.) 3
- More pleasant/greener environment 3
- More public spaces 3
- Improve pedestrian environment 3
- Longer shop opening hours 2
- Reduce pollution 2
- Better bus service 2
- Improve access to bus stop locations 1
- Other 3

When asked which of these they considered most important, five out of fifteen respondents thought that having a better range of shops to be most important whilst a similar proportion thought that more/easier parking was most important.

- Better range of shops 5
- More/easier parking 5
- Improve shops / better quality shops 1
- More shops 1
- Cleaner streets 1
- Improved cycle facilities 1
- Other 1

Best and worst aspects of the area

The bus transport links and the frequency of bus services were considered the best aspect of the area, followed by the mix of cultures in the community.

- Bus transport links and frequency of services 7
- Mix of cultures in the community 4
- Uniqueness of the area 2
- Vibrancy of the area 1
- Affordable house/rental prices 1

The mix of cultures in the community was considered the second best aspect of the area.

- Mix of cultures in the community   5
- Affordable house/rental prices   2
- Attractiveness of the area   2
- Vibrancy of the area   1
- Range and quality of shops and businesses   1
- Bus transport links and frequency of services   1
- Ease of movement on foot   1
- None   1

Six out of fifteen respondents thought the risk of crime (both day and night) was the worst aspect of the area.

- Personal security - risk of crime (day and night)   6
- Attractiveness of area   1
- Range and quality of shops and businesses   1
- Safety from traffic when crossing road   1
- Other   5
- None   1

5.4   An interview with the Town Centre Manager

The town centre manager for Hackney, Hannah Dalgleish, was interviewed to ascertain her views on the town centre as a whole and specifically on the impacts of the proposed pedestrianisation.

The interview was conducted by telephone on 10 April 2013.

The town centre manager was responsible for:

- the private sector development in the town
- coordinating the development and regeneration within the town centre
- delivering a series of projects to support the regeneration of the town.

She was happy with the bus service and the train provision –the introduction of the London Overground service had worked very well including the provision of a lift in the station.

The only people she doesn't think were well provided for were cyclists – they were currently cycling the wrong way up Mare Street. So an extension of the Cycle Superhighway would be appreciated.

She said there was a lack of parking facilities for cars. Currently there were only 30 car parking spaces. She didn't know whether it was expensive or cheap to park. They were currently considering opening the Town Hall car park at weekends for car parking.

Pedestrianisation of Narrow Way was mentioned unprompted within five minutes of the interview starting. She said it was being trialled in June for six months. Her view was that if footfall increases or remains static it will remain.

She said it was being trialled in order to reduce congestion and the high levels of air pollution caused by buses. All the chain shops supported it – independents were split with several quite opposed to it.

However, bus stops were only being moved 25 metres down the road so it was not that significant.

The pedestrianised area would be encouraged to have cafes with space outside for people to sit down. It should become a much nicer area.

Also cyclists should be allowed to cycle down each side. She stressed it was a trial and they would have to wait and see the results of it.

She felt that the area was well served by public transport – plenty of buses and good coverage. She would like more Countdown signs at bus stops though as there were currently only a few.

APPENDIX A

Paper Version of Questionnaire

LOCATION:

1. Aldgate	9. Hounslow
2. Bethnal Green	10. Kingston
3. Bromley	11. Oxford Street/Regent Street
4. Ealing Broadway	12. Romford Town
5. Hackney	13. Shepherds Bush
6. Harlesden	14. Twickenham
7. Kingsland High Street	15. Wood Green
8. Hornchurch	

**Town Centres Survey
2013**

EP:
1
2
3

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

Introduction

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

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

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

Q2. Have you, or will you, be using any of the shops or facilities in this area, or are you just passing through, for example on your way to work?
1.   Yes, have/will be using shops/facilities
2.   No, just passing through **IF LOCATION = 11 CONTINUE; OTHERWISE THANK AND CLOSE**

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

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

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

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

Details of visiting area

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

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

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

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

Mode of transport

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

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

Q7B **IF Q7= 5 (BUS) AND LOCATION = 5 (HACKNEY)** Which bus number did you use?

1	30	8	253
2	38	9	254
3	48	10	276
4	55	11	277
5	106	12	394
6	236	13	D6
7	242	14	W15
		15	Other **WRITE IN** ………………………….

Q7C **IF Q7 = 5 (BUS) AND LOCATION = 5 (HACKNEY)** Which stop did you get off at? **SHOW HACKNEY BUSES SHOWCARD**

1	A	7	G
2	B	8	H
3	C	9	J
4	D	10	T
5	E	11	K
6	F	12	Z
		13	Bus top not on map

Q7D **IF LOCATION = 5 (HACKNEY)** Which of the roads on this map have you visited or do you plan to visit today? **SHOW HACKNEY ROAD MAP. CODE ALL MENTIONED**

1	Mare Street (north)	4	Graham Road
2	Mare Street (south)	5	Amhurst Road
3	Morning Lane	6	Dalston Lane

Q8. How frequently do you use **[MODE OF TRANSPORT ATQ7]** to travel to this area?

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

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

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

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

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

IF Q7 = 5 (BUS) AND LOCATION = 5 (HACKNEY)

9	The amount of time it took to walk from the bus stop to where you wanted to go today'	0	1	2	3	4	5	6	7	8	9	10

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

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

………………………………………………………………………

Q12. **IF MORE THAN ONE ANSWER AT Q11 ASK** And which ONE reason best describes why you decided to use that method? Circle code in column Q11 Above for one reason only

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

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

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

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

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

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

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

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

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

Q17B Have you used any pedestrian information signs in this area today?
1 Yes   2 No **GO TO Q18B**

Q17C How easy did you find it to use the signs?
1 very easy   4 difficult
2 easy   5 very difficult
3 neither easy nor difficult

Q17D Was the information on the signs helpful?
1 Yes   2. No

Q18B How safe do you feel in this neighbourhood during the day?
1 Very safe   4 Very unsafe
2 Fairly safe   5 Never go out in the day
3 A bit unsafe

Q18C How safe do you feel in this neighbourhood during the evening/after dark?
1 Very safe   4 Very unsafe
2 Fairly safe   5 Never go out in the evening
3 A bit unsafe

Q18E In the past year, would you say you have seen more, less or about the same amount of uniformed police officers (that is, police men and women and Police Community Support Officers) in this local neighbourhood?
1 More   3 Less
2 About the same   4 Don't know

Q18F **IF CYCLIST (Q7 = 8 OR 9 OR Q9 = 6 OR 7) ASK:** How safe do you feel when cycling in this neighbourhood?
1 Very safe   3 A bit unsafe
2 Fairly safe   4 Very unsafe

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

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

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

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

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

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

Shopping and expenditure in the area

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

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

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

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

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

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

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

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

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

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

		A	1ST
1	More shops	1	1
2	Better range of shops	2	2
3	Improve shops / better quality shops	3	3
4	Longer shop opening hours	4	4
5	More leisure facilities e.g. restaurants, bars, cinemas etc	5	5
6	More pleasant/greener environment	6	6

7	Cleaner streets	7	7
8	Reduce pollution	8	8
9	More public spaces	9	9
10	Remove undesirable element/more policing	10	10
11	Less traffic	11	11
12	High street should be pedestrianised	12	12
13	Improve pedestrian environment	13	13
14	More/easier parking	14	14
15	Better bus service	15	15
16	Improve access to bus stop locations	16	16
17	Improved cycle facilities	17	17
18	Other	18	18
19	Nothing	19	
20	Don't know	20	20

Oxford Street/Regent Street only – others go to Q29A

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

**DO NOT PROMPT.
CODE ALL MENTIONED**

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

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

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

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

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

QX6 Have you used the diagonal crossing at Oxford Circus?

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

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

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

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

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

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

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

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

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

Q29D Do you do internet shopping?

1	Yes	2	No **GO TO Q30**

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

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

Classification

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

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

Q30A	How easy did you find moving around this area?		
	1 very easy	4	difficult
	2 easy	5	very difficult
	3 neither easy nor difficult		

Q31.	Do you use a wheelchair for travelling?		
	1 Yes	3	Refused
	2 No		

Q32.	Is the respondent carrying any of the following…? **CODE BY OBSERVATION**		
	1 Shopping bag(s) / shopping trolley	4	Suitcase / rucksack
	2 Buggy / pram	5	Other large / awkward object
	3 Carrying a child / baby	6	Nothing

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

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

Q34. **RECORD GENDER**

1	Male	2	Female

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

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

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

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

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

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

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

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

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

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

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

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

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

1	Yes	2	No

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

1   Yes   2   No

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

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

Respondent name: ....

Telephone: home:...............................work:...
Thank you
I confirm that this interview was conducted under the terms of the MRS code of conduct and is completely confidential

Interviewer's signature:...

APPENDIX B

Key Results by Town Centre

Demographic profile

Table 59: Gender by town centre

	Aldgate %	Bethnal Green %	Bromley %	Ealing Broadway %	Hackney %	Harlesden %	Kingsland High Street %	Hornchurch %	Hounslow %	Kingston %	Oxford Street/ Regent Street %	Romford Town %	Shepherds Bush %	Wood Green %
Male	54	48	36	38	43	48	46	34	42	33	39	37	44	41
Female	46	52	64	62	57	52	54	66	58	67	61	63	56	59
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**	**301**	**297**

Table 60: Age by town centre

	Aldgate %	Bethnal Green %	Bromley %	Ealing Broadway %	Hackney %	Harlesden %	Kingsland High Street %	Hornchurch %	Hounslow %	Kingston %	Oxford Street/ Regent Street %	Romford Town %	Shepherds Bush %	Wood Green %
16-24	13	14	17	23	15	17	14	9	18	25	17	17	23	20
25-34	25	22	19	22	21	26	26	18	20	19	29	18	28	21
35-44	19	21	14	13	26	21	17	19	18	16	20	13	18	30
45-54	22	12	19	15	19	15	18	19	17	13	16	14	14	17
55-59	11	10	7	7	7	9	7	10	6	6	9	9	5	6
60-64	3	8	10	6	4	4	7	8	6	6	4	9	5	2
65-74	3	8	9	10	6	7	7	14	9	10	3	11	4	4
75 or over	1	3	4	4	2	2	2	3	5	3	1	7	3	1
Refused	0	*	1	*	*	0	*	0	*	1	0	*	*	0
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**	**301**	**297**

* = less than 0.5%

Table 61: Ethnicity by town centre

	Aldgate %	Bethnal Green %	Bromley %	Ealing Broadway %	Hackney %	Harlesden %	Kingsland High Street %	Hornchurch %	Hounslow %	Kingston %	Oxford Street/ Regent Street %	Romford Town %	Shepherds Bush %	Wood Green %
White	71	59	85	74	50	29	49	86	54	88	78	83	52	54
Mixed Background	14	20	6	10	9	19	17	3	32	4	6	4	17	11
Asian or Asian British	8	12	5	11	37	47	29	8	10	2	11	6	20	28
Black or Black British	4	5	1	5	4	3	3	2	2	3	2	2	8	4
Chinese or Any Other	1	3	2	1	*	1	1	*	2	1	2	1	2	1
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**	**301**	**297**

* = less than 0.5%

Table 62: Employment Status by town centre

	Aldgate %	Bethnal Green %	Bromley %	Ealing Broadway %	Hackney %	Harlesden %	Kingsland High Street %	Hornchurch %	Hounslow %	Kingston %	Oxford Street/ Regent Street %	Romford Town %	Shepherds Bush %	Wood Green %
Working full time (30+ hours a week)	67	41	41	42	46	38	47	35	41	42	61	36	46	49
Working part time (less than 30 hours a week)	12	17	17	17	22	19	17	23	15	15	16	13	16	22
A full time student	8	7	6	14	9	10	6	4	11	16	10	7	11	11
A part time student	0	1	0	1	0	1	*	0	*	1	*	0	1	0
Not working, but looking for work	4	5	4	3	5	9	6	4	5	2	2	5	7	7
Not working and not looking for work	2	7	5	3	4	6	4	4	4	2	3	3	5	2
Retired	3	16	19	16	11	11	14	23	16	18	7	25	10	7
Looking after family and home	1	4	5	4	2	6	4	6	6	2	1	5	3	2
Other	0	1	1	0	0	1	*	1	1	*	*	2	*	*
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**	**301**	**297**

* = less than 0.5%

Table 63: Income by town centre

	Aldgate %	Bethnal Green %	Bromley %	Ealing Broadway %	Hackney %	Harlesden %	Kingsland High Street %	Hornchurch %	Hounslow %	Kingston %	Oxford Street/ Regent Street %	Romford Town %	Shepherds Bush %	Wood Green %
Under £5,000	3	3	2	3	1	2	1	*	5	2	*	4	3	5
£5,000-£9,999	3	6	5	4	4	3	6	2	4	3	1	4	4	3
£10,000-£14,999	5	8	6	3	5	3	7	3	3	2	2	4	7	6
£15,000-£19,999	4	4	3	2	5	7	5	4	6	5	4	5	8	7
£20,000-£24,999	6	6	1	5	8	8	9	8	6	5	3	4	5	8
£25,000-£34,999	12	12	8	6	12	10	16	11	7	7	9	10	10	11
£35,000-£49,999	13	12	12	6	8	7	8	9	12	11	10	11	9	8
£50,000-£74,999	12	3	13	8	5	2	7	9	8	10	16	7	12	3
£75,000-£99,999	5	1	3	2	1	2	1	2	2	7	6	3	2	2
£100,000 or over	3	*	2	5	*	*	1	*	1	2	5	*	3	*
Don't know	13	24	22	21	28	25	10	26	22	20	21	23	15	18
Refused	20	19	23	34	22	29	28	25	25	24	21	19	21	29
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**	**301**	**297**

* = less than 0.5%

Table 64: Number of people in household by town centre

	Aldgate %	Bethnal Green %	Bromley %	Ealing Broadway %	Hackney %	Harlesden %	Kingsland High Street %	Hornchurch %	Hounslow %	Kingston %	Oxford Street/ Regent Street %	Romford Town %	Shepherds Bush %	Wood Green %
One	11	22	14	22	17	15	20	12	16	17	13	16	21	15
Two	34	26	34	26	22	19	23	37	23	30	30	32	19	31
Three	18	19	19	21	26	26	24	19	23	23	26	20	22	25
Four	22	20	20	18	23	24	20	23	17	22	20	22	20	19
Five	8	6	8	9	8	10	7	7	13	4	5	5	9	6
Six or more	4	4	3	3	2	5	5	3	6	3	5	1	8	4
Refused	*	1	1	2	1	0	*	0	1	1	1	1	1	*
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**	**301**	**297**

* = less than 0.5%

Table 65: Access to a car by town centre

	% Aldgate	% Bethnal Green	% Bromley	% Ealing Broadway	% Hackney	% Harlesden	% Kingsland High Street	% Hornchurch	% Hounslow	% Kingston	% Oxford Street/ Regent Street	% Romford Town	% Shepherds Bush	% Wood Green
Yes, drove today	3	7	25	12	4	10	7	36	14	27	3	30	5	8
Yes, but used another mode	38	23	32	31	23	26	25	23	30	34	42	20	24	37
No - no access to a car or van	57	69	41	54	73	63	68	41	55	37	55	46	70	56
Refused	0	*	*	2	*	*	*	*	1	1	1	*	0	0
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**	**301**	**297**

* = less than 0.5%

Table 66: Mobility by town centre

	% Aldgate	% Bethnal Green	% Bromley	% Ealing Broadway	% Hackney	% Harlesden	% Kingsland High Street	% Hornchurch	% Hounslow	% Kingston	% Oxford Street/ Regent Street	% Romford Town	% Shepherds Bush	% Wood Green
No, none	94	88	89	92	95	94	93	90	90	93	98	90	92	98
Mobility impairment	3	8	6	3	2	5	3	8	6	5	1	8	5	*
Visual impairment	0	1	*	1	*	*	1	1	1	1	*	0	*	0
Hearing impairment	1	1	*	2	1	1	2	0	2	*	1	1	2	1
Learning disability	*	1	1	1	0	*	0	1	*	0	*	*	*	*
Mental health condition	*	*	2	*	*	0	1	1	2	1	0	1	1	*
Serious long term illness	*	1	2	1	1	1	1	0	1	1	0	1	1	*
Other	*	1	1	1	*	*	*	0	1	1	0	*	0	0
Refused	1	0	*	0	0	0	0	*	0	0	0	*	0	0
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**	**301**	**297**

* = less than 0.5%

Table 67: Whether use wheelchair for travelling by town centre

	% Aldgate	% Bethnal Green	% Bromley	% Ealing Broadway	% Hackney	% Harlesden	% Kingsland High Street	% Hornchurch	% Hounslow	% Kingston	% Oxford Street/ Regent Street	% Romford Town	% Shepherds Bush	% Wood Green
Yes	*	0	1	1	*	*	1	*	1	1	*	*	0	0
No	98	100	99	99	99	99	99	99	99	98	99	99	100	100
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**	**301**	**297**

* = less than 0.5%

Table 68: Whether carrying anything by town centre

	% Aldgate	% Bethnal Green	% Bromley	% Ealing Broadway	% Hackney	% Harlesden	% Kingsland High Street	% Hornchurch	% Hounslow	% Kingston	% Oxford Street/ Regent Street	% Romford Town	% Shepherds Bush	% Wood Green
Shopping bag(s)/shopping trolley	28	54	60	43	52	63	53	62	54	61	61	65	46	62
Buggy/pram	0	2	4	2	2	1	4	5	3	5	1	3	2	1
Carrying a child/baby	*	2	1	1	*	2	1	0	*	1	0	1	0	*
Suitcase/rucksack	10	6	4	5	12	9	4	5	5	11	7	6	7	11
Other large/awkward object	*	2	1	1	1	1	0	1	1	1	1	1	1	*
Nothing	61	36	34	49	35	26	39	32	38	30	33	29	47	28
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**	**301**	**297**

* = less than 0.5%

Table 69: Ease of moving around the area

	% Aldgate	% Bethnal Green	% Bromley	% Ealing Broadway	% Hackney	% Harlesden	% Kingsland High Street	% Hornchurch	% Hounslow	% Kingston	% Oxford Street/ Regent Street	% Romford Town	% Shepherds Bush	% Wood Green
very easy	71	52	72	80	37	46	54	56	61	74	73	71	74	56
easy	22	41	23	15	58	48	39	34	32	22	23	23	23	42
neither easy nor difficult	4	3	3	3	4	6	5	4	5	1	2	4	1	2
difficult	2	3	2	1	*	*	2	5	1	2	2	1	2	0
very difficult	0	*	*	0	0	0	0	*	*	0	0	0	0	0
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**	**301**	**297**

* = less than 0.5%

Table 70: Where live

	% Aldgate	% Bethnal Green	% Bromley	% Ealing Broadway	% Hackney	% Harlesden	% Kingsland High Street	% Hornchurch	% Hounslow	% Kingston	% Oxford Street/ Regent Street	% Romford Town	% Shepherds Bush	% Wood Green
Inner London[21]	54	90	17	9	88	4	88	1	3	5	34	4	66	31
Outer London[22]	24	8	72	84	11	95	12	96	92	79	21	88	28	64
The South East of England	15	2	11	4	*	*	*	3	2	13	12	6	3	1
Elsewhere in England	3	*	*	2	*	1	*	*	1	1	7	1	1	1
Scotland, Wales or Northern Ireland	*	*	*	*	*	*	*	*	*	*	1	*	*	*
Outside of the UK	4	*	*	1	1	*	*	*	1	1	25	*	1	1
Weighted base	**284**	**289**	**302**	**308**	**300**	**289**	**287**	**307**	**305**	**297**	**292**	**297**	**297**	**295**

* = less than 0.5%

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[21] Inner London = Camberwell, Clapham Junction, Greenwich, Hackney, Enfield, Stratford
[22] Outer London = Bromley, Bexleyheath, Croydon, Ealing, Harlesden, Harrow, Kingston, Wood Green

Purpose of visit

Table 71: Main purpose mentioned for visiting the town centre by town centre

	% Aldgate	% Bethnal Green	% Bromley	% Ealing Broadway	% Hackney	% Harlesden	% Kingsland High Street	% Hornchurch	% Hounslow	% Kingston	% Oxford Street/ Regent Street	% Romford Town	% Shepherds Bush	% Wood Green
Shopping	18	52	60	60	51	70	60	69	66	70	67	73	55	64
Using service	11	12	8	11	13	9	8	7	13	4	2	6	10	7
Using public amenity	3	3	4	1	2	2	1	1	1	1	*	2	1	3
Eating/drinking out	21	6	5	5	6	4	5	10	7	8	5	5	11	8
Other social/leisure	1	2	2	1	3	1	1	3	1	1	2	1	3	2
Buying petrol	0	0	0	0	0	1	0	*	0	0	0	0	*	0
Delivering goods	0	*	2	1	0	*	2	1	*	2	2	1	0	3
Window shopping	1	3	2	3	6	6	2	2	2	*	2	3	1	3
Personal business	1	1	*	0	1	*	*	1	0	*	0	1	*	*
General recreation	7	6	*	2	7	1	8	1	2	2	0	1	2	1
Live here	31	7	11	8	5	4	11	3	5	8	14	5	10	5
Work here	2	3	1	4	*	0	*	*	0	0	1	0	*	0
Travelling through the area	2	4	2	4	5	2	2	2	3	2	3	2	3	2
Visiting friends and relatives	0	*	0	1	0	0	0	1	0	1	0	0	1	0
Dropping off/picking up friend or relative	2	1	1	1	*	*	0	0	0	1	1	*	1	1
Other	18	52	60	60	51	70	60	69	66	70	67	73	55	64
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**	**301**	**297**

* = less than 0.5%

Mode of Access to area today

Table 72: Modes used to access each area by town centre

	% Aldgate	% Bethnal Green	% Bromley	% Ealing Broadway	% Hackney	% Harlesden	% Kingsland High Street	% Hornchurch	% Hounslow	% Kingston	% Oxford Street/ Regent Street	% Romford Town	% Shepherds Bush	% Wood Green
Drove a car/van/lorry	2	4	24	12	3	10	7	33	10	25	1	30	4	7
Drove a motorbike/moped/ scooter	0	*	0	*	*	*	0	0	0	*	1	0	0	0
Drove a delivery vehicle	0	1	0	0	0	0	0	0	0	0	0	0	0	0
Given a lift	1	2	3	*	1	1	*	4	3	3	0	3	1	1
Bus	21	24	43	34	43	39	30	31	41	36	12	43	31	46
Tube/Underground	38	12	0	18	1	2	3	*	7	0	62	0	30	14
Train	16	3	14	4	17	2	12	*	3	14	14	11	8	4
Bicycle	3	1	1	4	1	*	7	0	2	2	*	1	1	*
Barclays Cycle Hire	1	0	0	0	0	0	0	0	0	0	0	0	0	0
Walked	17	52	14	27	32	44	40	29	33	19	7	11	25	28
Taxi/minicab	*	*	1	*	*	1	*	1	*	1	2	1	*	1
Other	*	1	*	*	*	*	1	*	0	1	1	0	0	0
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**	**301**	**297**

* = less than 0.5%

1. 6% = tram

Frequency of visiting centre

Table 73: Frequency of visiting town centre by town centre

	% Aldgate	% Bethnal Green	% Bromley	% Ealing Broadway	% Hackney	% Harlesden	% Kingsland High Street	% Hornchurch	% Hounslow	% Kingston	% Oxford Street/ Regent Street	% Romford Town	% Shepherds Bush	% Wood Green
5 or more days a week	61	41	22	33	34	41	40	30	24	28	17	18	35	35
3 or 4 days a week	10	17	13	16	17	20	17	20	13	8	5	17	12	23
2 days a week	6	16	16	11	17	14	15	18	16	13	4	19	9	14
Once a week	7	14	18	20	17	13	14	17	23	19	6	24	13	10
Once a fortnight	2	4	12	6	5	6	5	7	8	10	6	8	5	7
About once a month	2	5	7	6	5	2	3	5	11	11	15	6	9	4
Less than once a month	8	2	10	6	4	3	5	3	3	10	32	8	9	4
First time	4	1	1	2	1	1	1	1	2	1	14	1	7	2
Weekly mean	**3.9**	**3.3**	**2.3**	**2.9**	**3.0**	**3.4**	**3.3**	**2.9**	**2.4**	**2.4**	**1.4**	**2.3**	**2.7**	**3.2**
Monthly mean	**15.7**	**13.4**	**9.0**	**11.4**	**12.1**	**13.6**	**13.1**	**11.7**	**9.6**	**9.4**	**5.4**	**9.1**	**10.9**	**12.6**
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**	**301**	**297**

* = less than 0.5%

Average Spend

Table 74: Average spend today by town centre

	% Aldgate	% Bethnal Green	% Bromley	% Ealing Broadway	% Hackney	% Harlesden	% Kingsland High Street	% Hornchurch	% Hounslow	% Kingston	% Oxford Street/ Regent Street	% Romford Town	% Shepherds Bush	% Wood Green
Nothing	5	8	5	8	6	6	4	3	6	2	3	4	2	6
Under £5	24	16	12	13	7	5	13	7	10	12	5	5	11	9
£5-£19.99	42	38	26	32	33	42	36	28	31	24	16	23	33	34
£20-£49.99	19	29	28	26	39	32	34	37	33	29	14	33	30	32
£50-£99.99	6	5	21	13	12	10	10	20	14	18	27	23	13	15
£100+	3	3	9	8	2	4	2	4	6	15	36	12	11	5
Mean (£)	**21**	**22**	**41**	**33**	**28**	**28**	**26**	**35**	**33**	**48**	**87**	**48**	**41**	**30**
Weighted base[1]	**279**	**286**	**286**	**299**	**299**	**298**	**290**	**303**	**297**	**290**	**286**	**295**	**295**	**295**

1. except refused and don't know

Table 75: Average spend per visit by town centre

	% Aldgate	% Bethnal Green	% Bromley	% Ealing Broadway	% Hackney	% Harlesden	% Kingsland High Street	% Hornchurch	% Hounslow	% Kingston	% Oxford Street/ Regent Street	% Romford Town	% Shepherds Bush	% Wood Green
Nothing	4	2	1	2	6	2	1	1	1	*	3	2	3	3
Under £5	29	9	15	9	5	4	11	4	8	9	4	3	9	4
£5-£19.99	40	48	24	39	40	39	38	28	37	27	15	25	32	29
£20-£49.99	18	33	31	29	39	41	34	39	37	32	15	41	29	43
£50-£99.99	2	3	15	13	7	11	13	22	11	18	21	22	14	16
£100+	2	2	7	2	2	3	1	3	4	9	30	4	7	2
Mean (£)	**17**	**21**	**37**	**27**	**25**	**29**	**26**	**35**	**32**	**40**	**84**	**38**	**36**	**33**
Weighted base[1]	**266**	**279**	**268**	**281**	**296**	**296**	**287**	**292**	**293**	**276**	**251**	**289**	**279**	**291**

* = less than 0.5%

1. except refused and don't know

Table 76: Average total spend per week by town centre

	% Aldgate	% Bethnal Green	% Bromley	% Ealing Broadway	% Hackney	% Harlesden	% Kingsland High Street	% Hornchurch	% Hounslow	% Kingston	% Oxford Street/ Regent Street	% Romford Town	% Shepherds Bush	% Wood Green
Nothing	4	2	1	2	6	2	1	1	1	*	3	2	4	3
Under £5	10	6	11	6	8	3	9	5	9	8	12	6	8	4
£5-£19.99	30	19	31	23	14	13	18	13	22	24	34	18	22	13
£20-£49.99	27	27	20	30	26	24	22	25	27	29	23	26	26	22
£50-£99.99	13	29	22	24	27	30	26	25	29	25	14	32	24	26
£100+	15	17	16	16	19	28	23	32	12	13	14	17	16	32
Mean (£)	**57**	**65**	**56**	**58**	**69**	**87**	**73**	**98**	**58**	**62**	**59**	**68**	**61**	**92**
Weighted base[1]	**267**	**279**	**269**	**282**	**295**	**296**	**287**	**293**	**293**	**278**	**250**	**289**	**278**	**290**

* = less than 0.5%

1. except refused and don't know

Table 77: Average total spend per month by town centre

	% Aldgate	% Bethnal Green	% Bromley	% Ealing Broadway	% Hackney	% Harlesden	% Kingsland High Street	% Hornchurch	% Hounslow	% Kingston	% Oxford Street/ Regent Street	% Romford Town	% Shepherds Bush	% Wood Green
Nothing	4	2	1	2	6	2	1	1	1	*	3	2	4	3
Under £5	2	1	*	1	3	*	2	*	2	1	7	1	4	1
£5-£19.99	7	5	9	4	5	2	6	4	6	4	4	4	3	2
£20-£49.99	8	8	15	8	6	5	7	5	10	11	17	9	12	5
£50-£99.99	24	12	20	16	9	9	14	13	15	17	20	12	14	10
£100+	55	72	55	68	71	81	70	78	66	66	48	72	64	78
Mean (£)	**226**	**260**	**226**	**233**	**276**	**350**	**291**	**391**	**231**	**246**	**238**	**272**	**243**	**368**
Weighted base[1]	267	279	269	282	295	296	287	293	293	278	250	289	278	290

* = less than 0.5%

1. except refused and don't know

Improvements to town centres

Table 78: Main priority for improvements in each area by town centre

	Aldgate %	Bethnal Green %	Bromley %	Ealing Broadway %	Hackney %	Harlesden %	Kingsland High Street %	Hornchurch %	Hounslow %	Kingston %	Oxford Street/ Regent Street %	Romford Town %	Shepherds Bush %	Wood Green %
Nothing	13	7	28	20	7	5	8	6	18	39	31	32	22	14
More shops	15	3	4	3	2	2	4	3	1	1	2	4	1	2
Better range of shops	12	15	8	22	27	16	12	32	17	4	1	9	4	16
Improve shops / better quality shops	5	10	10	10	15	9	12	17	11	7	3	5	6	14
Longer shop opening hours	1	2	6	5	1	2	2	3	4	4	3	5	1	3
More leisure facilities	3	4	5	4	4	3	3	2	4	4	1	1	5	2
More pleasant/greener environment	6	7	7	3	10	7	11	8	2	7	4	5	6	5
Cleaner streets	10	9	6	7	6	10	13	4	10	6	6	11	12	6
Reduce pollution	5	6	1	1	*	1	2	1	3	2	6	1	8	3
More public spaces	1	3	1	1	2	1	4	1	1	1	2	1	3	2
Remove undesirable element/more policing	4	9	4	4	12	18	7	3	11	4	2	9	4	7
Less traffic	6	6	4	5	3	11	5	4	3	2	20	1	11	11
High street should be pedestrianised	2	2	*	2	3	0	3	2	2	1	6	*	2	2
Improve pedestrian environment	4	4	2	1	*	3	2	1	1	1	4	2	2	3
More/easier parking		4	4	3	4	5	3	3	1	4	1	1	2	4
Better bus service	4	*	2	1	1	2	2	*	2	3	1	2	1	2
Improve access to bus stop locations	0	1	1	0	*	0	0	*	1	1	0	*	1	*
Improve cycle facilities	2	1	1	1	2	1	3		2	2	1	1	2	1
Other	3	2	4	3	1	3	3	8	2	4	3	6	4	1
Don't know	4	4	1	4	2	1	*	3	3	4	4	4	4	1
Weighted base	291	290	304	307	300	299	289	308	306	298	296	300	301	297

* = less than 0.5%
Shaded boxes indicate top mentions in each town centre

APPENDIX C

Response and Weighting Factors

Response and Weighting Factors

Response

The total number of interviews was 4,185 (an average of 299 in each area[23]).

Weighting factors

In order to reflect the distribution of the results by day as achieved in earlier phases of the Town Centres research the data were weighted so that 70% of the results were from weekdays, 20% from Saturdays and 10% from Sundays. The unweighted bases were 73% weekday, 19% Saturday and 8% Sunday.

Values used for calculating average spend:

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

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

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

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[23] Note that Hackney had a booster of 150 interviews so there were 463 interviews in total there, but these have been weighted to 300 for the purpose of the overall reporting

Appendix D

Retail Park Sampling Method

Methodology and Recruitment Method

Interviewing was conducted at six Enumeration Points (EPs) in order to ensure all parts of the retail park were included and all types of visitor will be covered.

Table 79: Map or Tottenham Retail Park showing EPs

At each EP interviewers walked along the pavement in front of the store fronts to intercept shoppers using more than one outlet as follows:

- EP1 covers Costa, JD, Boots and Next
- EP2 covers Greggs, EE, Subway, O2 and Burger King
- EP3 covers Currys and Argos
- EP4 covers Poudworld, Asda living, PC World and Lidl
- EP5 covers Comet, Staples, CarpetRight and Halfords
- EP6 covers B&Q, Garden centre and Carphone Warehouse

The fieldwork shift schedule is shown below.

		EP for first 3 hours	EP for second 3 hours
Wednesday, 27-Mar-13	8-2pm	1	4
Thursday, 28-Mar-13	8-2pm	2	5
Tuesday, 02-Apr-13	12-6pm	4	1
Wednesday, 03-Apr-13	8-2pm	3	6
Wednesday, 03-Apr-13	12-6pm	5	2
Thursday, 04-Apr-13	12-6pm	6	3
Saturday, 06-Apr-13	10-4pm	1	4
Saturday, 06-Apr-13	12-6pm	2	5
Sunday, 07-Apr-13	11-5pm	3	6

APPENDIX E

Paper version of Retail Park Questionnaire

Interviewer name:		Interviewer no:		Date:		Time:	

Introduction

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

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

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

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?
    3.   Yes, have/will be using shops/facilities
    4.   No, just passing through **THANK AND CLOSE**

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

		Q3	Q4
1	Shopping	1	1
2	Eating/drinking out..	1	4
3	Other social/leisure	1	5
4	Buying petrol...	1	6
5	Delivering goods	1	7
6	Window shopping	1	8
7	General recreation	1	10
8	Work here..	1	12
9	Visiting friends and relatives...	1	14
10	Other **CODE AND TYPE IN**	1	16

AT LEAST ONE OF 1 – 6 MUST BE CODED

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

Details of visiting area

Q5. **SHOW MAP** How often do you visit this retail park?

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

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

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

Mode of transport

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

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

Q8. How frequently do you use **[MODE OF TRANSPORT AT Q7]** to travel to this retail park?
1   5 or more days a week
2   3 or 4 days a week
3   2 days a week
4   Once a week
5   Once a fortnight
6   About once a month
7   Less than once a month
8   First time
9   Don't know

Q9. What other modes do you use to travel to this retail park? **MULTICODE**
1   Car / van / lorry
2   Motorbike / moped / scooter
3   Bus
4   Tube / Underground
5   Train
6   Bicycle
7   Barclays Cycle Hire
8   Walk all the way
9   Taxi / minicab
10   Other **TYPE IN** ………………………….

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

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

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

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

……………………………………………………………………

Q12. **IF MORE THAN ONE ANSWER AT Q11 ASK** And which ONE reason best describes why you decided to use that method? Circle code in column Q12 Above for one reason only

Q21. **ASK IF DROVE OR WAS GIVEN LIFT (Q7 CODES 1-4), OTHERWISE GO TO Q23** Where did you park your vehicle? Was it… read out
1   Off street residential parking
2   Off street private parking (eg driveway)
3   Off street municipal/NCP car park
4   In retail park
5   On main road
6   On side road
7   In filling station forecourt
8   Other place
9   Don't know

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

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

Shopping and expenditure in the area

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

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

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

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

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

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

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

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

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

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

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

All

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

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

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

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

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

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

Q29D Do you do internet shopping?

1 Yes	2 No **GO TO Q30**

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

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

Classification

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

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

Q30A   How easy did you find moving around this retail park?

1	very easy		4	difficult
2	easy		5	very difficult
3	neither easy nor difficult			

Q31. Do you use a wheelchair for travelling?

1	Yes		3	Refused
2	No			

Q32. Is the respondent carrying any of the following…? **CODE BY OBSERVATION**

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

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

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

Q34. **RECORD GENDER**

1	Male		2	Female

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

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

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

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

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

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

Q37. Do you have access to a car or van that you could have used for your journey to this area today?

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

Q38. Are you the chief income earner your household? That is the person with the largest income whether from employment pensions, state benefits, investments or any other sources (if equal income is claimed for 2 or more people, refer to the eldest)

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

Q39. What is your total gross annual household income? This is income from work and any other sources such as benefits and pensions, before deductions e.g. income tax, National Insurance. **SHOWCARD 19**

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

Q40. Thank you very much for taking part in this survey. If necessary may we recontact you about this study?

1	Yes	2	No

Q41. Transport for London may be carrying out further research about transport in London. Would it be OK for a research company working on their behalf to contact you again in the future for research purposes?

1	Yes	2	No

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

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

Respondent name: ....

Telephone: home:.. work:...

Thank you

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

Interviewer's signature: ....

APPENDIX F

Hackney Business Questionnaire

Good morning/afternoon/evening. My name is ….. and I am carrying out research for Transport for London into Hackney Town Centre.

This research is conducted under the terms of the MRS code of conduct and is completely confidential. If you would like to **confirm** Accent's credentials please call the MRS free on 0500 396999. You do not have to answer questions you do not wish to and you can terminate the interview at any point

INTERVIEWER, Seek out the person responsible for the shop or business (proprietor/manager/senior staff) and collect contact details:

Business name:	
Address:	
Phone	

Q1.   The first few questions are about your business. What is the nature of the business?
1   Retail
2   Catering

Q2.   How many people does your company employ at this address?
1.   sole trader
2.   2-4
3.   5-9
4.   10-20
5.   20+

Q3.   How many years has the company been based at this address?
1.   Less than 1 year
2.   1 to 2 years
3.   2 to 5 years
4.   5 to 10 years
5.   10 to 20 years
6.   Over 21 years
7.   Don't know

Access

Q4.   I am now going to ask some questions about how your customers arrive at your premises.

Approximately what proportion of your customers do you think travel to this area by car (or other private transport)?
1.   Most
2.   Some
3.   Very few
4.   None

Q5.   Approximately what proportion of your customers do you think travel to this area by bus?
1.   Most
2.   Some
3.   Very few
4.   None

Q6.   Approximately what proportion of your customers do you think travel to this area by bicycle?
1.   Most
2.   Some
3.   Very few

4. None

Q7. Approximately what proportion of your customers do you think travel to this area on foot (ie they live or work locally)?
1. Most
2. Some
3. Very few
4. None

Q8. Do you have an off street parking area for your customers, deliveries, staff or visitors?
1. Yes
2. No

Q9. Where do vehicles visiting your premises park or stop? **CODE ALL MENTIONED**

a.	Main road	1
b.	Service area to rear	1
c.	Service road (at front)	1
d.	Side road	1
e.	Car park	1
f.	Other (please write in)	1
g.	Not applicable	1

Q10. How satisfied are you with the number of parking spaces provided in this area?
1. Very dissatisfied
2. Dissatisfied
3. Neither
4. Satisfied
5. Very satisfied

Q11. How satisfied are you with the ease of access to this area by car?
1. Very dissatisfied
2. Dissatisfied
3. Neither
4. Satisfied
5. Very satisfied

Q12. How satisfied are you with the ease of access to this area by bus?
1. Very dissatisfied
2. Dissatisfied
3. Neither
4. Satisfied
5. Very satisfied

Q13. On a five point scale where 1 = very dissatisfied and 5 = very satisfied and thinking about bus services in this area how satisfied are you with the following aspects:

	Very dis-satisfied 1	Dis-satisfied 2	Neither 3	Satisfied 4	Very Satisfied 5	Don't know 9
a) Frequency of buses						
b) Speed of travel on the bus						
c) Location of bus stops						
d) Information provision on bus stops						
e) Condition of bus stops						

Q14. Now, thinking about driving, how satisfied are you with the following aspects of this area:

	Very dis-satisfied 1	Dis-satisfied 2	Neither 3	Satisfied 4	Very Satisfied 5	Don't know 9
a) Speed of travel, congestion and delays						
b) Location and number of places to park						

Q15. Now, thinking about walking in this area how satisfied are you with the following aspects:

	Very dis-satisfied 1	Dis-satisfied 2	Neither 3	Satisfied 4	Very Satisfied 5	Don't know 9
a) Width of the pavement						
b) Availability of seating						
c) Number and suitability of pedestrian crossings						
d) Ease of movement within this area						

Q16. Now, thinking about this area as a whole, how satisfied are you with the following aspects?

	Very dis-satisfied 1	Dis-satisfied 2	Neither 3	Satisfied 4	Very Satisfied 5	Don't know 9
a) Attractiveness of the area						
b) Air quality						
c) Noise						
d) Plants and trees along the street						
e) Risk of accident on the road						
f) Spaces to meet people and chat						
g) Range of local shopping and other facilities (eg post office, newsagent, cafes etc.)						
h) Attractiveness and quality of local shopping and other facilities						
i) Cleanliness and freedom from litter of the pavement						

Local Area

Q17. In what ways do you think this area could be improved? **SHOW MAP. CODE ALL MENTIONED IN COLUMN A BELOW. SHOWCARD A**

Q18. Which of these would be the most important? **PROBE FOR MOST IMPORTANT AND CODE IN 1ST COLUMN**

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

Q19. What is the best aspect of this area? **SHOWCARD B**
1. Uniqueness of the area
2. Attractiveness of the area
3. Space to meet people and chat
4. Vibrancy of the area (many people and activities on the street)
5. Mix of cultures in the community
6. Affordable house/rental prices
7. Range and quality of shops and businesses
8. Close to schools, hospital or other services
9. Bus transport links and frequency of services
10. Convenient for access by car
11. Convenient for cycling
12. Ease of movement on foot (pavement provision and crossings)
13. Environment (noise, air and greenery)
14. Personal security - risk of crime (day and night)
15. Safety from traffic when crossing the road

Q20. And the second best aspect?
1. Uniqueness of the area
2. Attractiveness of the area
3. Space to meet people and chat
4. Vibrancy of the area (many people and activities on the street)
5. Mix of cultures in the community
6. Affordable house/rental prices
7. Range and quality of shops and businesses
8. Close to schools, hospital or other services
9. Bus transport links and frequency of services
10. Convenient for access by car
11. Convenient for cycling
12. Ease of movement on foot (pavement provision and crossings)
13. Environment (noise, air and greenery)
14. Personal security - risk of crime (day and night)
15. Safety from traffic when crossing the road
16. None

Q21.   What is the worst aspect of this area? **SHOWCARD B**
1.   Uniqueness of the area
2.   Attractiveness of the area
3.   Space to meet people and chat
4.   Vibrancy of the area (many people and activities on the street)
5.   Mix of cultures in the community
6.   Affordable house/rental prices
7.   Range and quality of shops and businesses
8.   Close to schools, hospital or other services
9.   Bus transport links and frequency of services
10.   Convenient for access by car
11.   Convenient for cycling
12.   Ease of movement on foot (pavement provision and crossings)
13.   Environment (noise, air and greenery)
14.   Personal security - risk of crime (day and night)
15.   Safety from traffic when crossing the road
16.   None

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

SYSTEM INFORMATION
Time interview completed:

Appendix G

Town Centre Manager Topic Guide