Town Centres

Final Report

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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 2013, 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

This was a two phase study. In the first phase, face-to-face research was conducted on-street with a sample of about 300 visitors to each of 12 town centres.

- **Central London**: Oxford Street/Regent Street*
- **Inner London**: Clapham Junction, Clapham Old Town
- **Outer London**[1]: Barking*, Bexleyheath, Ealing, Enfield Town*, Hornchurch, Kingston*, Richmond*, Uxbridge*, Walthamstow*

In the second phase, face-to-face research was conducted on-street with a sample of about 300 visitors to each of 14 town centres.

- **Central London**: Oxford Street/Regent Street*
- **Inner London**: Eltham, Lewisham*, Woolwich*
- **Outer London**: Bromley, Enfield Town*, Hayes, Harlesden, Ilford, Kingston*, Romford, Stratford, Walthamstow*, Wimbledon*

The cycle boosters were undertaken at seven of the town centres in each phase (marked with an *):

Fieldwork for the first phase was conducted between 6 October and 9 November 2014. 3,536 interviews were conducted, about 300 at each town centre plus 374 cycle booster interviews.

Fieldwork for the second phase was conducted between 6 March and 21 April 2015, avoiding the Easter school holidays. 4,224 interviews were conducted, about 300 at each town centre plus 355 cycle booster interviews.

Mini Hollands

Three of the town centres, covered in both phases, were chosen as they are part of the Mini-Holland programmes being rolled in the London Boroughs of Enfield, Kingston and Waltham Forest.

[1] Using definition of Outer London Boroughs used by the London Plan team

It is designed to provide outer London boroughs with investment in cycling facilities to encourage an increase in cycling particularly for the 77% of short car trips that could be cycled. The idea is that the selected areas would become as cycle friendly as their Dutch counterparts, hence the name.

The schemes typically feature Superhubs, redesigns of the town centres, cycle routes (eg superhighways, greenways and riverside routes) and marketing initiatives particularly targeting those who are less likely to cycle.

A summary of the key initiatives in each of the boroughs is given below:

- **Kingston** – A major cycle hub, plaza outside Kingston station will be transformed. New cycling routes including a Thames Riverside Broadway.
- **Enfield** – redesign of Enfield town centre with segregated superhighways, three cycle hubs and greenway routes.
- **Waltham Forest** – A semi-segregated Superhighway route and a range of measures in residential areas creating cycle friendly, low-traffic neighbourhoods.

For each Mini-Holland town centre there was a control for each phase as follows:

Mini-Holland town centre	Phase 1 control	Phase 2 control
Walthamstow	**Barking**	Woolwich
Enfield Town	Uxbridge	**Lewisham**
Kingston	**Richmond**	Wimbledon

Bold = the 'control' recommended by the TfL Cycling team

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 80% it was one of the purposes and for two thirds the main purpose. Eating and drinking out was also important being mentioned by a fifth but was only the main purpose for 6%.

- Time Spent in Town Centre
  - 72% of visitors were planning to spend at least one hour in the town centre with 50% spending between one and three hours.
  - Those who walked and cycled to the area tended to spend less time in the town centre. The proportions planning to spend more than an hour in the town centre who travelled by access mode were train/Tube (84%), car (75%) and bus (73%) were, walk (60%) and cycle (60%).

- Frequency of Visiting
  - 79% 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 (51% visit five days a week or more) followed by bus users (31%) Car users visit least often (17%)

- Shopping and Expenditure in the Area
  - 49% were shopping for groceries and food, 34% were shopping for clothes or footwear, 27% were eating out and 10% were using a service.
  - The average spend was £39 on the day of interview, slightly more than the usual spend per visit: £34. The average spend per week was £73. The average The mean monthly spend was £293
  - Average spend per visit by mode was car £47, train/Tube £47, bus £30, walk £25 and cycle £25.
  - Average spend per week by mode was walk £92, bus £71, car £71, cycle £65 and train/Tube £50
  - Average spend per month by mode was walk £370, bus £284, car £283, cycle £259 and train/Tube £201.

- Mode of Transport
  - 35% use bus to access the town centre, 27% walk, 16% drove, 10% use train, 7% use the Tube and 2% cycle
  - The main reason for using each mode is: **car:** easier/more convenient (28%), **bus:** cheaper (22%), **train/Tube:** quicker (51%), **cycle:** cheaper (19%) and **walk:** live very close by (34%)
  - Walking was the most frequently used mode. The weekly mean frequency for the different modes was: walk 4.0, bus 3.0, bicycle 2.7, train/Tube 1.9 and car 1.9
  - 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 7.0 respectively on a scale from 0, very dissatisfied to 10, very satisfied).

- Attitudes to and Use of Bus
  - 78% sometimes use the bus to travel in the area of the town centre
  - Bus use is largely unchanged compared to twelve months ago
  - Bus customers were most positive about the ease of getting on and off the bus (mean score of 8.06[2]) and the convenience of bus stops (7.98). Bus users were least satisfied with the level of crowding on the bus (7.35). Ratings for all aspects are at their highest level
  - The top four factors that would encourage greater use of the bus were more regular/frequent buses (17%), more reliable buses (15%), faster journeys (13%) and direct bus routes (11%).

- Attitudes towards Town Centres

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

- The main ways that the town centres could be improved were 'better range of shops' (28%), 'more pleasant/greener environment' (25%), 'cleaner streets' (22%) and 'improve shops/better quality shops' (21%). 15% said nothing could be done
- 73% of town centre visitors felt very safe and 24% felt fairly safe during the day. Only 26% said they felt very safe and 34% fairly safe during the evening/after dark. 21% didn't go out then
- The best rated aspects of the town centres overall were 'ease of walking around' and 'graffiti and fly posting'. The worst rated aspects were 'ease of cycling', 'trees and plants' and 'traffic noise'
- The average ratings of the mean scores for the 14 town centres show that, overall, Kingston has the best rating on the aspects followed by Bromley, Harlesden, Hayes and Oxford Street/Regent Street. The three lowest rated town centres are Lewisham, Eltham and Ilford.

- Oxford Street/Regent Street
  - Oxford Street is visited because of its shopping facilities: 45% considered it to be the best shopping area, 20% were visiting a particular shop and 14% cited 'more/better/ bigger range of shops'
  - 34% were aware of the changes to travel around Tottenham Court Road
  - Of those who were aware 49% knew it was because of building rail/Crossrail station
  - 41% 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.

Cycle boosters key results 2015

- Shopping was the main reason for visiting the town centres: for 71% it was one of the purposes and for 58% the main purpose. Services were used by 21% and it was the main reason for visiting for 10%. Eating and drinking out was also important being mentioned by 21% but was only the main purpose for 8%.

- 59% said they were planning to spend at least one hour in the town centre with 46% spending between one and three hours.

- The majority of cyclists visit the town centre on a regular basis with 80% visiting the area once a week or more often.

- 73% cycle to the town centre once a week or more. Bus was the most used 'other' mode with 55% of cyclists mentioning it. 27% of bicycle users also sometimes walk to the town centres and 20% use a private vehicle.

- The main things that encouraged / influenced their choice to cycle there that day were 'dedicated cycle paths' (42%) and 'cycle lanes on the roads' (40%).

- 38% of cyclists visiting the town centres were shopping for groceries and food. A quarter were shopping for clothes or footwear, 16% were eating out.

- The average spend was £29 on the day of interview which was higher than the usual spend per visit (£27). The average spend per week was £55 and the average spend per month was £218. This is less than the £259 for the non booster cycle sample.

Mini Hollands

- Cyclists in each Mini Hollands town centre (Enfield Town, Kingston and Walthamstow) were more likely than other visitors to live or work more than 10 minutes walk from the town centre.

- Cyclists were much less likely to be shopping than visitors by other modes although it was still the predominant purpose, particularly in Kingston and Walthamstow.

- Visitors to Enfield Town spent less time and visitors to Kingston and Walthamstow spent longer than visitors to outer London town centres.

- Cyclists in Enfield Town and Walthamstow visit the town centre more often than overall visitors to the town centres, whereas the reverse is the case for Kingston.

- Bus use in Enfield Town (37%) and Walthamstow (35%) was similar to Outer London town centres overall (36%) but in Kingston (30%) it was lower. Walk was much higher in Walthamstow (38%) than elsewhere (22%-28%).

- In Enfield Town the main improvements that would encourage cycling were 'more cycle lanes on the roads' (30% compared to 14% overall) and 'more dedicated cycle paths' (23% compared to 15% overall). 53% said nothing would encourage them to cycle (compared to 65% overall). In Walthamstow the main improvements were also 'more cycle lanes on the roads' (27% compared to 14% overall) and 'more dedicated cycle paths' (24% compared to 15% overall). 61% said nothing would encourage them to cycle (compared to 65% overall). The Kingston sample was similar to Outer London town centres.

- The average spend per week was £72 at outer London town centres. Enfield Town was lower at £61 per week whereas Kingston (£82) and Walthamstow (£86) were higher. Cyclists spent less than visitors overall at each of the Mini-Holland town centres.

1. INTRODUCTION

1.1 Background

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

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

The research is designed to provide data on who uses town centres with the key descriptor being the mode used to access the town centre. The research is designed to explore, for users of different modes, the time spent in the centre, frequency of visit, key activities and spend. It is also designed to understand town centre users' attitudes towards buses and cycling and how use of those modes could be increased. The research will also explore how town centre users believe town centres can be improved.

In addition the research covered three Mini-Holland town centres and provides travel and attitudinal information on the pre-implementation Mini-Holland town centres and their control sites.

This research follows previous town centres studies in 2013, 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, walk and cycle 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
- to explore perceptions of different modes, and specific attitudes to bus use and bus service provision.

The results from both phases of this study are presented side by side are also compared to results from previous Town Centres studies.

2. METHODOLOGY

2.1 Introduction

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

There were two phases of the research with the first phase covering 12 locations and the second phase covering 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 or were the sites of the planned Mini-Hollands. The locations were (sites covered in both phases are shaded):

Phase 1	Phase 2
Barking	Bromley
Bexleyheath	Eltham
Clapham Junction	Enfield Town
Clapham Old Town	Harlesden
Ealing	Hayes
Enfield Town	Ilford
Hornchurch	Kingston
Kingston	Lewisham
Oxford Street/Regent Street	Oxford Street/Regent Street
Richmond	Romford
Uxbridge	Stratford
Walthamstow	Walthamstow
	Wimbledon
	Woolwich

At seven of the sites in each phase cycle booster shifts were undertaken.

Phase 1	Phase 2
Barking	Enfield Town
Enfield Town	Kingston
Kingston	Lewisham
Oxford Street/Regent Street	Oxford Street/Regent Street
Richmond	Walthamstow
Uxbridge	Wimbledon
Walthamstow	Woolwich

Kingston and Oxford Street/Regent Street were also surveyed in 2014, 2013, 2011, 2009 and 2004. Bromley was also surveyed in 2013, 2011, 2009 and 2004.

Harlesden was also surveyed in 2013, 2011 and 2004

Clapham Junction was also surveyed in 2011 and 2009. Enfield was also surveyed in 2009 and 2014. Ealing was also surveyed in 2013 and 2011. Romford was also surveyed in 2013 and 2009.

Barking, Clapham Old Town, Eltham, Hayes, Lewisham, Uxbridge and Wimbledon were surveyed for the first time in one of the two phases.

For analysis purpose these were grouped as follows:

	Phase 1	Phase 2
Central London	Oxford Street/Regent Street	Oxford Street/Regent Street
Inner London	Clapham Junction, Clapham Old Town	Eltham, Lewisham, Woolwich
Outer London	Barking, Bexleyheath, Ealing, Enfield Town, Hornchurch, Kingston, Richmond, Uxbridge, Walthamstow	Bromley, Enfield Town, Hayes, Harlesden, Ilford, Kingston, Romford, Stratford, Walthamstow, Wimbledon

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

	Phase 1	Phase 2
International	Oxford Street/Regent Street	Oxford Street/Regent Street
Metropolitan	Ealing, Kingston, Uxbridge	Bromley, Ilford, Kingston, Romford
Major	Barking, Bexleyheath, Clapham Junction, Enfield Town, Richmond, Walthamstow	Eltham, Enfield Town, Lewisham, Stratford, Walthamstow, Wimbledon, Woolwich
District	Clapham Old Town, Hornchurch	Hayes, Harlesden

2.2 Method

Face-to-face interviews using a Computer Aided Personal Interview (CAPI) questionnaire programmed for Android tablets were undertaken.

At each town centre interviewing was conducted at three[3] Enumeration Points (EPs) in order to ensure that all parts of the centre were included and all types of visitor were covered.

[3] except Bexleyheath, Harlesden and Richmond where there were two EPs

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)). See Appendix E.

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).

Fieldwork for the first phase was conducted between 6 October and 9 November 2014. Fieldwork for the second phase was conducted between 6 March and 21 April 2015, avoiding the Easter school holidays.

In the first phase 3,536 interviews were conducted and in the second phase 4,224 interviews were conducted as follows:

First Phase	n	Second Phase	n
Barking	294	Bromley	302
Bexleyheath	296	Eltham	303
Clapham Junction	292	Enfield Town	310
Clapham Old Town	291	Harlesden	294
Ealing	291	Hayes	308
Enfield Town	293	Ilford	302
Hornchurch	291	Kingston	307
Kingston	290	Lewisham	302
Oxford Street/Regent Street	296	Oxford Street/Regent Street	303
Richmond	296	Romford	307
Uxbridge	311	Stratford	297
Walthamstow	295	Walthamstow	296
		Wimbledon	294
		Woolwich	299

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.

Weighting

The target distribution of interviews was 70% weekday, 20% Saturday and 10% Sunday. The achieved interview distribution was 70% weekday, 22% Saturday and 8% Sunday in the first phase and 75% weekday, 19% Saturday and 7% Sunday.

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

Questionnaire

The questionnaire was based on the one used in the previous Town Centre surveys.

In the first phase, in order to measure the impact of the planned improvements at a number of the town centres a question was added to measure the current perceptions of the town centre with respect to:

- attractiveness
- traffic noise
- a relaxing place to be
- ease of crossing the main road
- air quality
- ease of walking around
- graffiti and fly posting
- litter
- pavement condition
- seating areas
- trees and plants.

A question on ratings of the bus priority measures was dropped.

In the second phase the following main changes were made:

- Those who did not access the town centre on foot or by cycle were asked if they also walked or cycled (for 5 minutes or more) as part of their trip. A similar question was asked concerning other modes used to travel to the town centre.

- ‘Bus stops feel safer’ was added as a category for the question asking what would encourage bus use in the area

- ‘ease of cycling’ was added to the rating question on aspects of the area
- ‘Better cycle routes to / through the town centre’ was added as a category for the question asking what would encourage cycle use in the area
- A new question was added for cyclists which asked: “Which of the things shown on the screen encouraged you [or influenced your choice] to cycle here today?”
- A series of questions were added on whether noticed improvements to pedestrian facilities, cyclist facilities and urban realm/landscape in the town centre area and if so, whether they encouraged walking, cycling or visits respectively

A copy of the paper version of the final Phase 1 and Phase 2 questionnaires are included in Appendix A.

3. FINDINGS

3.1 Introduction

This chapter sets out the findings for the two phases of the 2014-2015 Town Centre study.

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

First phase (2014)
- Barking
- Bexleyheath
- Clapham Junction
- Clapham Old Town
- Ealing
- Enfield Town
- Hornchurch
- Kingston
- Oxford Street/Regent Street
- Richmond
- Uxbridge
- Walthamstow

Second phase (2015)
- Bromley
- Eltham
- Enfield Town
- Harlesden
- Hayes
- Ilford
- Kingston
- Lewisham
- Oxford Street/Regent Street
- Romford
- Stratford
- Walthamstow
- Wimbledon
- Woolwich

The weighted overall sample size was 3,536 in the first phase and 4,224 in the second phase.

Changes over time

A similar research approach and questionnaire has been used in the last six phases of town centres studies (2015, 2014, 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 six studies. As only two town centres have been covered in all five surveys (very dark grey shading), one for 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 six surveys.

It should be noted that when looking at the data showing comparisons over time that the nature of the town centres covered are different and therefore changes such as average spend may partially be driven by that.

Table 1: Town centres surveyed in 2004, 2009, 2011, 2103, 2014 and 2015

	2004	2009	2011	2013	2014	2015
Aldgate				✓		
Barking					✓	
Bethnal Green				✓		
Bexleyheath			✓		✓	
Bromley	✓	✓	✓	✓		✓
Camberwell		✓	✓			
Chingford		✓				
Clapham Junction		✓	✓		✓	
Clapham Old Town					✓	
Croydon		✓	✓			
Dalston	✓					
Ealing			✓	✓	✓	
Eltham	✓					✓
Enfield		✓			✓	✓
Feltham	✓					
Greenwich			✓			
Hackney		✓	✓	✓		
Harlesden	✓		✓	✓		✓
Harrow	✓		✓			
Hayes						✓
High Street Kensington	✓	✓				
Hornchurch				✓	✓	
Hounslow				✓		
Ilford	✓					✓
Kingsland High Street				✓		
Kingston	✓	✓	✓	✓	✓	✓
Lewisham						✓
Neasden		✓				
Oxford Street/Regent St	✓	✓	✓	✓	✓	✓
Peckham	✓					
Richmond		✓			✓	
Romford		✓		✓		✓
Shepherds Bush				✓		
Stratford			✓			✓
Uxbridge					✓	
Walthamstow					✓	✓
Wembley		✓				
Wimbledon						✓
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

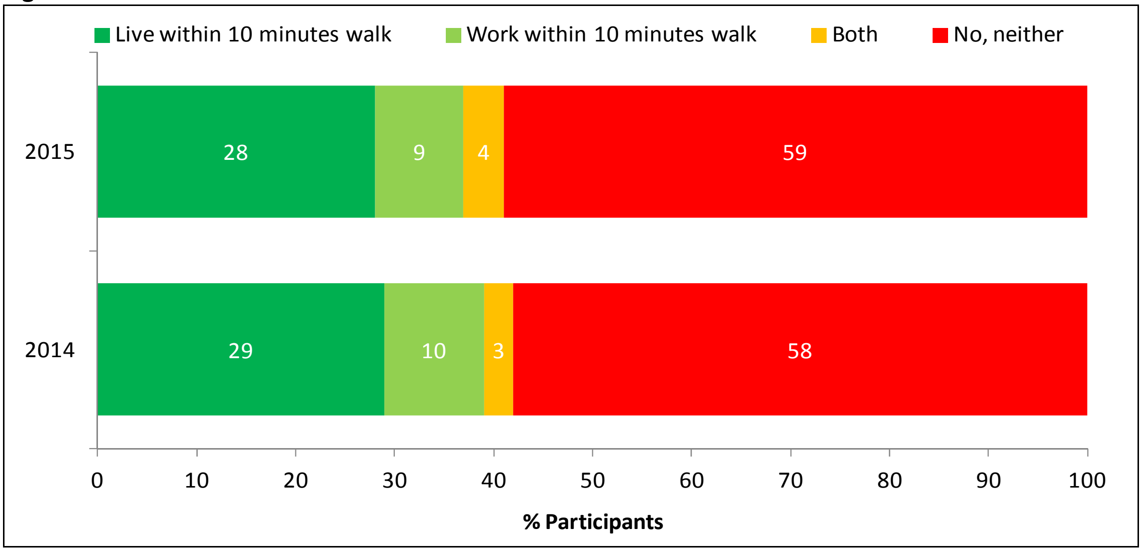
Summary

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

Shopping was the main reason for visiting the town centres: for four fifths it was one of the purposes and for about two thirds the main purpose. Eating and drinking out was also important being mentioned by about a fifth but was only the main purpose for 6% in 2015.

The town centres are used by both those who live and work in the area and by visitors from outside the area. The majority (58% in 2014 and 59% in 2015) do not live or work within 10 minutes walk of the town centre but 32% live in the area and 13% work in within 10 minutes walk of the town centre.

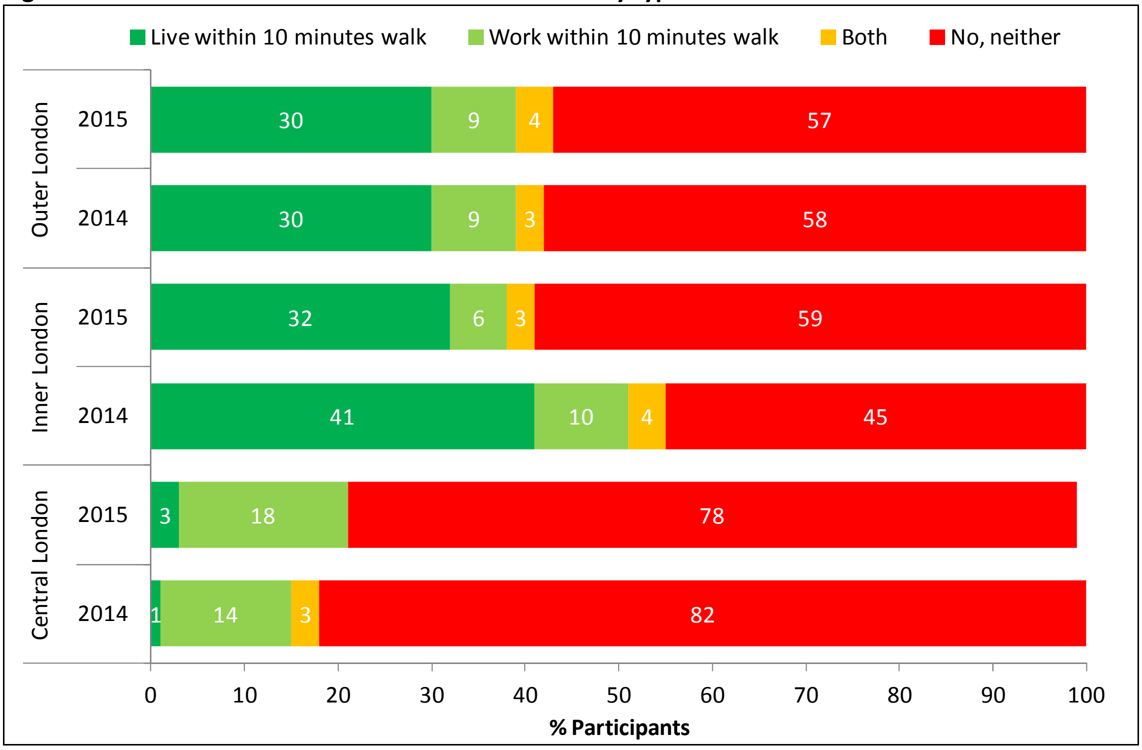
Figure 1: Whether live or work within 10 minutes walk



Weighted base: all respondents: 2015: 4,224; 2014: 3,536

Figure 2 shows that in 2015 those visiting Inner London town centres were less likely to live within 10 minutes of the centre 32% than in 2014. Those visiting Central London (Oxford Street/Regent Street) were least likely to live within 10 minutes of the centre but most likely to work within 10 minutes of the centre. Oxford Street/Regent Street was the location most likely to attract visitors from a wider catchment area (over three quarters more than 10 minutes walk away).

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



Weighted base: Central London 2015: 299, 2014: 294; Inner London 2015: 904, 2014: 582; Outer London 2015: 3,021, 2014: 2,660

Comparison over time

There is little change since 2013.

	2015	2014	2013	2011	2009	2004
Live/work within 10 minutes walk	41%	42%	41%	37%	38%	41%
Neither	59%	58%	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[4]. Shopping was the predominant purpose and the main reason for visiting for about two thirds of visitors. Eating and drinking out was also important, being mentioned by a fifth as one of the reasons for visiting but was only the main purpose for between 6% and 7%. All reasons and the main reasons for visiting the area are as shown in Table 2.

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

Table 2: Reasons for visiting town centre

	All purposes		Main purpose	
	2015 %	2014 %	2015 %	2014 %
Shopping	81	80	67	64
Eating/drinking out	19	22	6	7
Using service	16	18	8	8
Work here	8	10	7	9
Live here	6	8	2	4
Using public amenity	4	4	2	1
Visiting friends and relatives	4	4	2	3
Window shopping	2	3	*	1
Personal business	2	3	1	2
Other social/leisure	4	2	2	1
General recreation	*	1	1	*
Travelling through the area	2	1	1	*
Delivering goods	*	*	*	*
Dropping off/picking up friend or relative	*	*	*	*
Other	1	1	1	1
Weighted base	**4,224**	**3,536**	**4,224**	**3,536**

* = less than 0.5%

Table 3 shows the main reason for visiting according to the town centre categories as used in the London Plan. Comparisons between town centre categories suggest that those visiting International and Major town centres are more likely to be shopping than those visiting Metropolitan and District town centres.

Table 3: Main reasons for visit by town centre category – 2015 v 2014

	International		Metropolitan		Major		District	
	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %
Shopping	71	66	66	62	70	66	57	58
Using service	0	9	8	9	10	7	7	8
Using public amenity	0	1	3	*	2	1	2	1
Eating/drinking out	3	4	8	6	5	7	8	7
Other social/leisure	1	3	2	2	2	*	1	3
Delivering goods	*	0	0	0	*	*	1	*
Window shopping	1	1	*	1	1	1	1	*
Personal business	2	2	1	2	1	2	2	3
General recreation	0	*	1	*	*	*	1	1
Live here	1	*	1	2	1	3	5	9
Work here	16	12	7	12	6	8	7	5
Travelling through the area	1	0	*	1	*	*	2	*
Visiting friends and relatives	2	1	1	2	2	3	4	3
Dropping off/picking up friend or relative	*	0	0	*	*	*	1	0
Other	2	1	*	1	*	1	1	*
Weighted base	**299**	**294**	**1,222**	**892**	**2,107**	**1,761**	**596**	**589**

* = less than 0.5%

Main Reason

As regards the main reason for being in the centre in 2015 the most notable variations from the average were in Woolwich and Lewisham where a higher proportion were shopping (84% and 77% respectively) and in Hayes where the lowest proportion were shopping (54%).

At Hayes 11% were eating/drinking out compared to between 3% and 8% elsewhere. 16% in Oxford Street/Regent Street work in the area compared to between 4% and 11% elsewhere. At Eltham and Enfield Town a larger proportion were using services in the area compared to elsewhere: 16% and 15% respectively compared to up to 10% elsewhere.

The main reason for visiting each centre is shown in Table 99 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	2015	2014	2013	2011	2009	2004
Shopping	67%	64%	60%	53%	58%	64%
Work here	7%	9%	9%	10%	3%	7%
Using services	8%	8%	9%	8%	10%	8%
Eating/drinking out	6%	7%	7%	5%	7%	3%
Live here	2%	4%	3%	6%	2%	4%
Visiting friends and relatives	2%	3%	3%	3%	2%	1%
Personal business	1%	2%	3%	4%	4%	3%
Window shopping	*	1%	1%	2%	2%	1%
Using public amenity	2%	1%	2%	3%	4%	1%
Other social/leisure	2%	1%	2%	2%	5%	1%

* = less than 0.5%

3.3 Time Spent in Town Centre

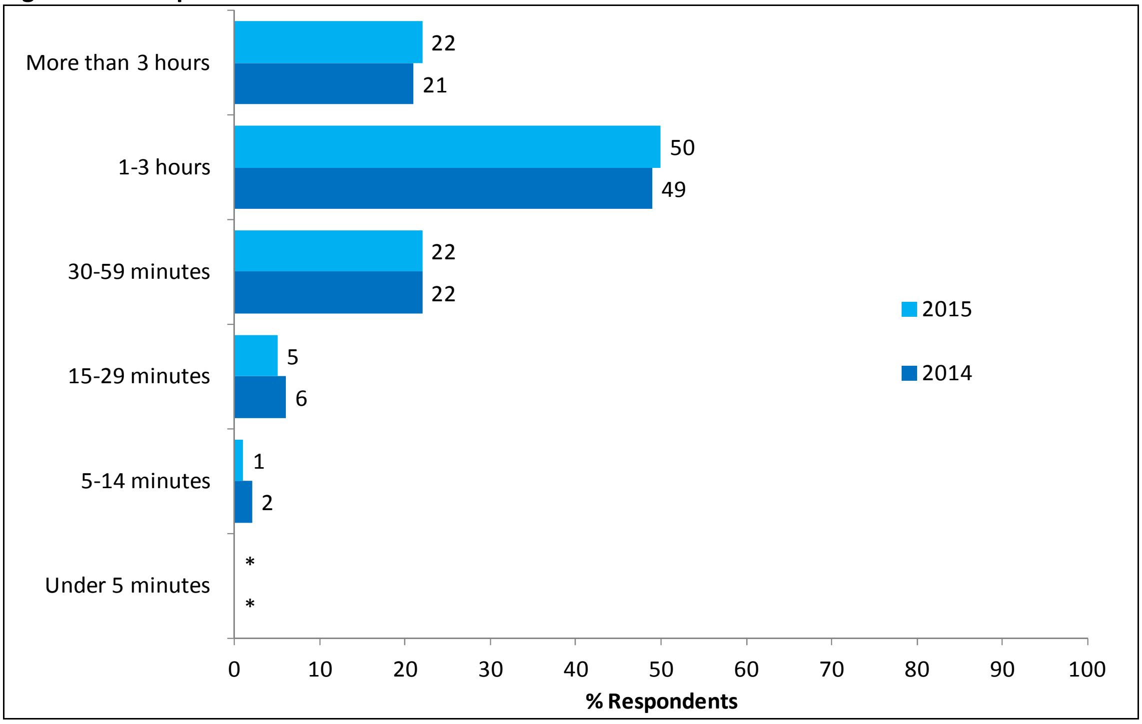
Summary

72% of visitors in 2015 were planning to spend at least one hour in the town centre with 50% spending between one and three hours.

Those who walked and cycled to the area tended to spend less time in the town centre (60% were planning to spend more than an hour in the town centre) whereas high proportions of those who travelled by train/Tube (84%), car (75%) and bus (73%) were planning to spend more than an hour in the town centre.

Over two thirds (72% in 2015, 70% in 2014) said they were planning to spend at least one hour in the town centre with about half spending between one and three hours.

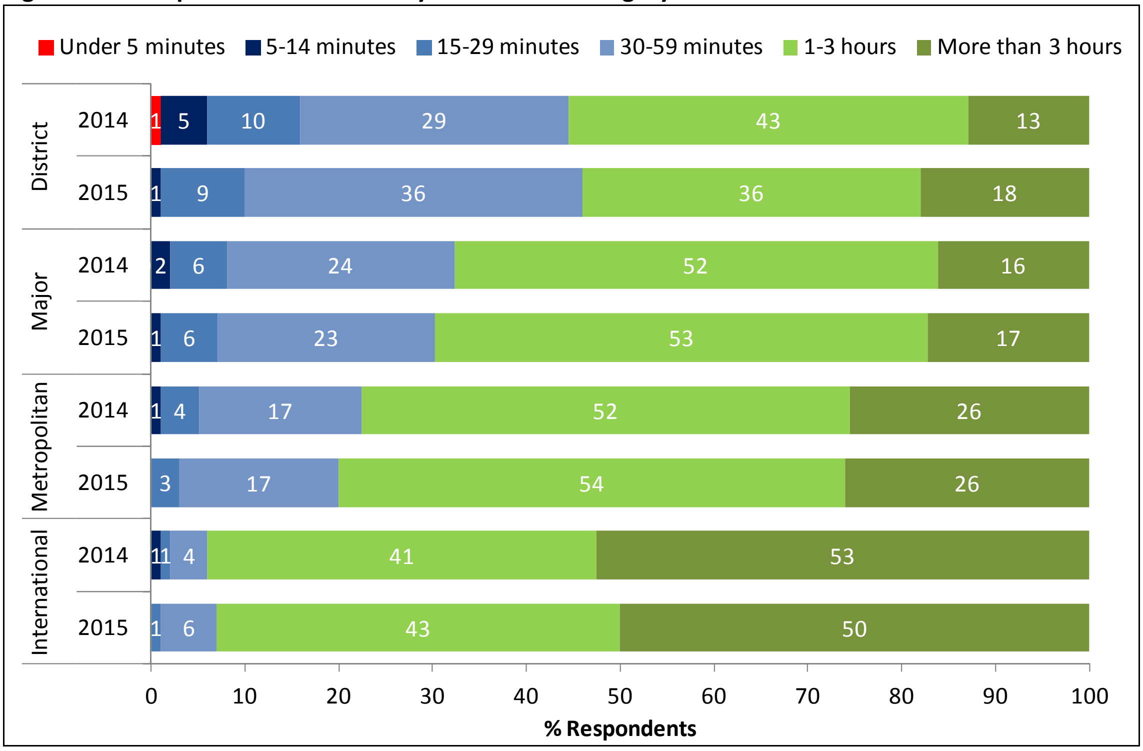
Figure 3: Time spent in town centre: 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536
* = less than 0.5%

Analysis by town centre category shows that the time spent in the town centre was longest for International, followed by Metropolitan and Major and shortest at District centres. See Figure 4.

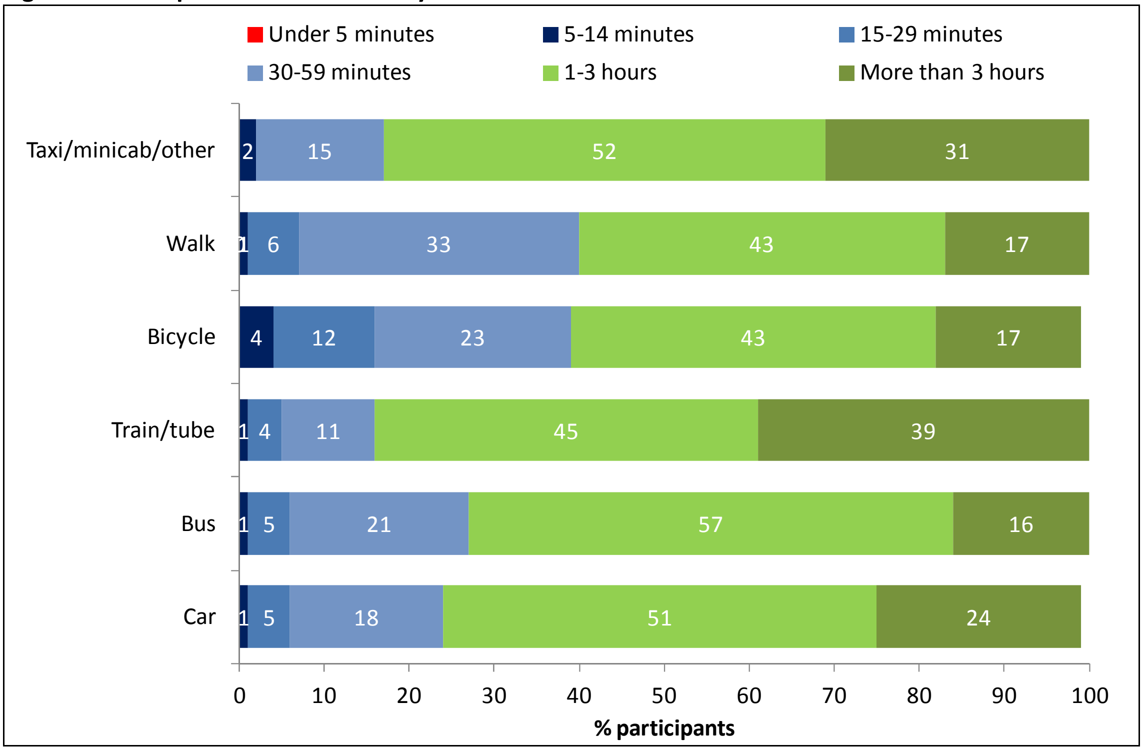
Figure 4: Time spent in town centre by town centre category – 2015 v 2014



Weighted base: International: 2015, 299; 2014, 294; Metropolitan: 2015, 1222; 2014, 892; Major: 2015, 2107; 2014, 1761; District: 2015, 596; 2014, 589

Those who walked and cycled to the area tended to spend less time in the town centre (60% were planning to spend more than an hour in the town centre) but high proportions of those who travelled by train/Tube (84%), car (75%) and bus (73%) were planning to spend more than an hour in the town centre.

Figure 5: Time spent in town centre by mode 2015

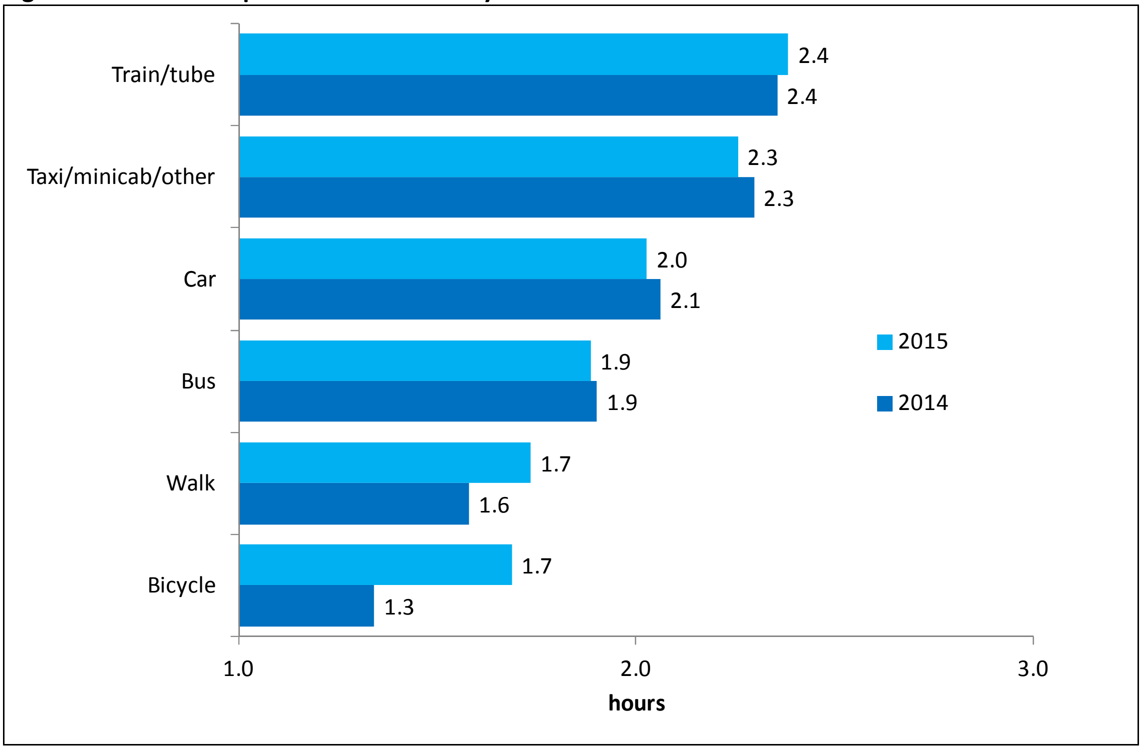


Weighted base: car 738, bus 1,497, train/Tube 739, bicycle 69, walk 1,136, taxi/minicab/other 46

The mean time spent was calculated by taking the mid points for each time band and assuming over three hours was 3:55 hours.

Those who travelled to the town centre by train or tube spent longest on average in the town centre in both 2015 and 2014. Those who walked and cycled to the town centre spent the least time on average in both 2015 and 2014 although the reported mean time spent in the town centre has increased, particularly for cycle.

Figure 6: Mean time spent in town centre by mode: 2014 v 2015



Weighted base: 2015: car 738, bus 1,497, train/Tube 739, bicycle 69, walk 1,136, taxi/minicab/other 46
2014: car 524, bus 1,201, train/Tube 720, bicycle 95, walk 971, taxi/minicab/other 24

Those visiting Oxford Street/Regent Street, Ealing, Bromley and Kingston were planning on spending the most time in the town centre (an average of 2.7 hours for Oxford Street/Regent Street, 2.3 hours for Bromley and 2.2 hours for Kingston). Those visiting Eltham, Harlesden and Enfield Town (1.6 hours) were making the briefest visits.

3.4 Frequency of Visiting

Summary

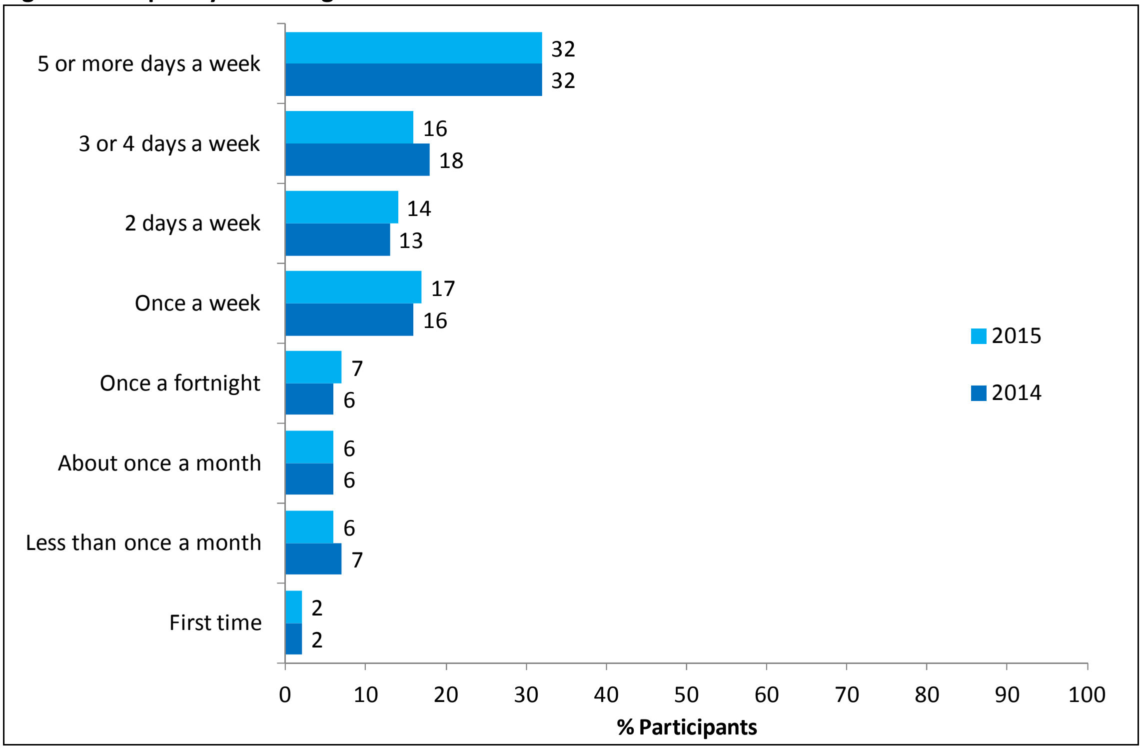
79% of visitors were visiting the area once a week or more often in both 2015 and 2014.

The average number of visits per month was 11.3 (11.5 in 2014).

Those who walk to the area are the most frequent visitors (51% visit five days a week or more in 2015) followed by bus users (31%). Car users, visit least often with 17% visiting five days a week or more often.

The majority visit the town centre on a regular basis with 79% visiting the area once a week or more often as shown in Figure 7. The exception to this is in the West End where only 37% said they visited the area once a week or more often.

Figure 7: Frequency of visiting town centre: 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536

The average number of visits per month was 11.3[5]. This is slightly lower than the average in 2014 of 11.5 but the same as 2013 and higher than 2011 and 2009 (11.0) and much higher than the average of 10 in 2004.

Harlesden is the centre visited most frequently (93% visit once a week or more often) and Lewisham (87%), Eltham (86%), Hayes (84%), Ilford (84%) Walthamstow (84%) and Woolwich (84%) also have a high proportion of frequent visitors.

Only 37% visit Oxford Street/Regent Street once a week or more often (43% in 2014). Bromley and Enfield Town have a relatively low proportion of frequent visitors (70% and 76% respectively visit once a week or more). See Table 103 in Appendix B.

Those who walk to the area are the most frequent visitors (51% visit five days a week or more in 2015) followed by bus users (31%).

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

Car users, however, tend to visit least often with 17% visiting five days a week or more often as shown in Table 4. The frequency of visiting has increased for walk and bus but decreased for other modes, particularly cycle.

Table 4: Frequency of visit by mode of access: 2015 v 2014

	Car		Bus		Train/Tube		Bicycle		Walk		Taxi/mini-cab/ other	
	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %
5 or more days a week	17	19	31	30	21	27	29	37	51	45	19	16
3 or 4 days a week	10	10	17	19	9	13	22	25	24	23	5	0
2 days a week	16	13	18	15	7	8	15	9	12	15	16	8
Once a week	24	24	19	18	16	13	19	16	9	10	23	22
Once a fortnight	13	10	6	7	10	7	8	7	2	2	4	25
About once a month	9	10	6	5	13	11	5	4	1	2	20	7
Less than once a month	9	13	3	4	17	14	1	1	1	3	4	14
First time	2	1	1	1	6	6	0		*	0	9	8
Monthly mean	**7.8**	**7.9**	**11.6**	**11.4**	**7.5**	**9.2**	**11.6**	**13.2**	**16.0**	**14.8**	**7.4**	**5.7**
Weighted base	**738**	**524**	**1,497**	**1,201**	**739**	**720**	**69**	**95**	**1,136**	**971**	**46**	**24**

* = less than 0.5%

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 the International town centre.

Table 5: Frequency of visit by London Plan town centre category: 2015 v 2014

	International		Metropolitan		Major		District	
	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %
5 or more days a week	19	12	29	32	30	32	53	41
3 or 4 days a week	3	13	15	20	18	17	18	18
2 days a week	5	8	16	13	16	15	8	11
Once a week	10	10	20	14	18	18	9	17
Once a fortnight	10	7	8	7	7	6	4	5
About once a month	16	14	7	6	5	5	3	3
Less than once a month	28	26	5	6	4	6	4	4
First time	10	10	1	2	2	1	1	1
Monthly mean	**5.9**	**5.9**	**10.8**	**11.7**	**11.3**	**11.5**	**15.3**	**13.3**
Weighted base	**299**	**294**	**1,222**	**892**	**2,107**	**1,761**	**596**	**589**

Comparison over time

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

	2015	2014	2013	2011	2009	2004
Once a week or more	79%	79%	77%	75%	73%	73%
Once a fortnight	7%	6%	7%	7%	8%	7%
Once a month	6%	6%	6%	8%	8%	9%
Less often	8%	9%	11%	9%	9%	11%

3.5 Mode of Transport

Summary

Over a third (35%) use bus to access the town centre, 27% walked, 16% drove, 10% used a train, 7% used the Tube and 2% cycled.

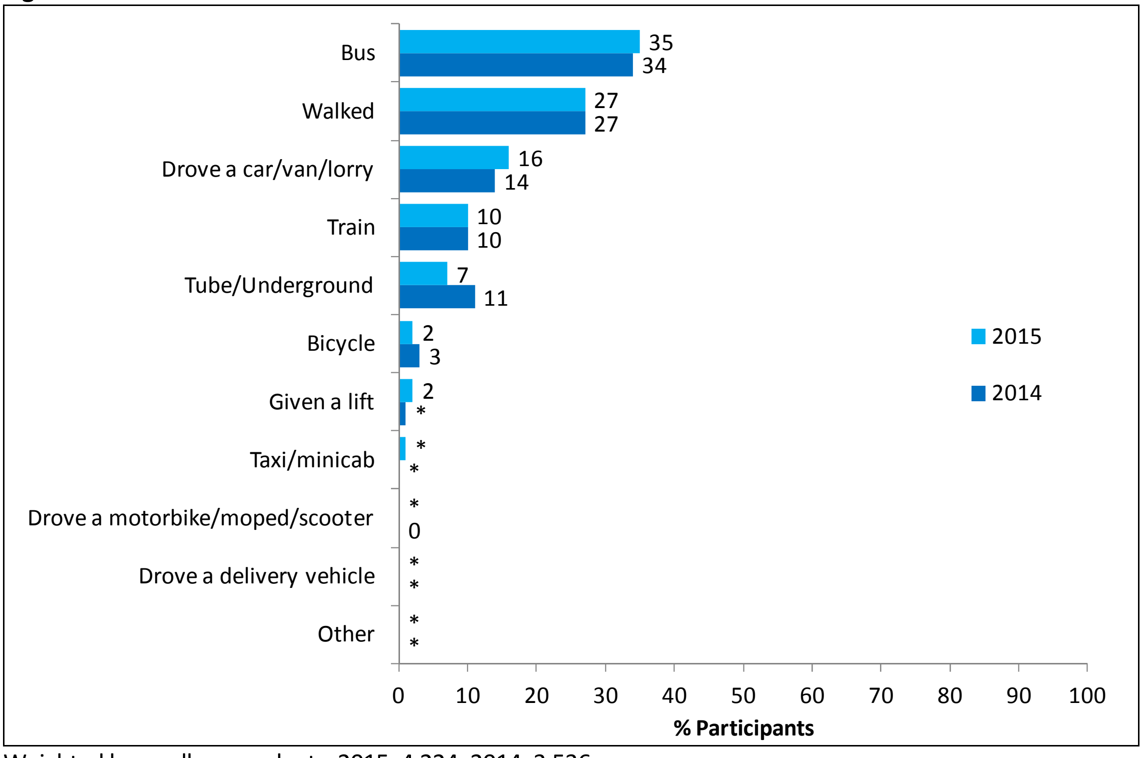
The main reason for using each mode is: **car:** easier/more convenient (28%), **bus:** cheaper (22%), **train/Tube:** quicker (51% in 2015, 54% in 2014), **cycle:** cheaper (19% in 2015, 24% in 2014) and **walk:** live very close by (34% in 2015, 29% in 2014).

Walking was the most frequently used mode. The weekly mean frequency for the different modes was: walk 4.0, bus 3.0, bicycle 2.7, train/Tube 1.9 and car 1.9.

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 7.0 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 (35% in 2015 and 34% in 2014). Twenty seven per cent walked to the town centre, 16% drove, 10% used the train and 7% used the Tube as shown in Figure 8.

Figure 8: Mode of access to area: 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536
* = less than 0.5%

Just over a third of those who did not walk or cycle said they also walked for five minutes or more as part of their trip to travel to the area that day. Less than 0.5% said they cycle or cycled and walked.

Nearly half (48%) who used train/Tube to access the town centre said they also walked for five minutes or more as part of their trip as did 34% of those who used bus and 21% who drove.

Those who did not use public transport to access the town centre but who sometimes did use public transport to access the town centre were asked whether on those occasions they also walked or cycled for five minutes or more as part of their trip to travel to the area. Overall, 46% said they did (45% walk and 1% cycle).

Over two thirds (69%[6]) of those who lived within a ten minute walk of the town centre walked there. This compares to 67% in 2014.

Table 6: Mode of access to area by whether live or work within 10 minutes walk of centre[7]

	Live		Work		Both		Neither	
	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %
Bus	19	19	31	22	36	17	44	44
Walked	72	68	11	12	44	55	6	8
Drove a car/van/lorry	5	6	19	18	12	16	20	16
Train	1	2	20	22	4	3	13	12
Tube/Underground	*	1	15	21		6	10	14
Bicycle	1	3	1	2	3	4	2	3
Given a lift	*	*	1	1	1	1	2	2
Taxi/minicab	0	*	0	0	1	0	1	1
Weighted base	**1,195**	**1,030**	**379**	**346**	**161**	**104**	**2,485**	**2,054**

* = less than 0.5%

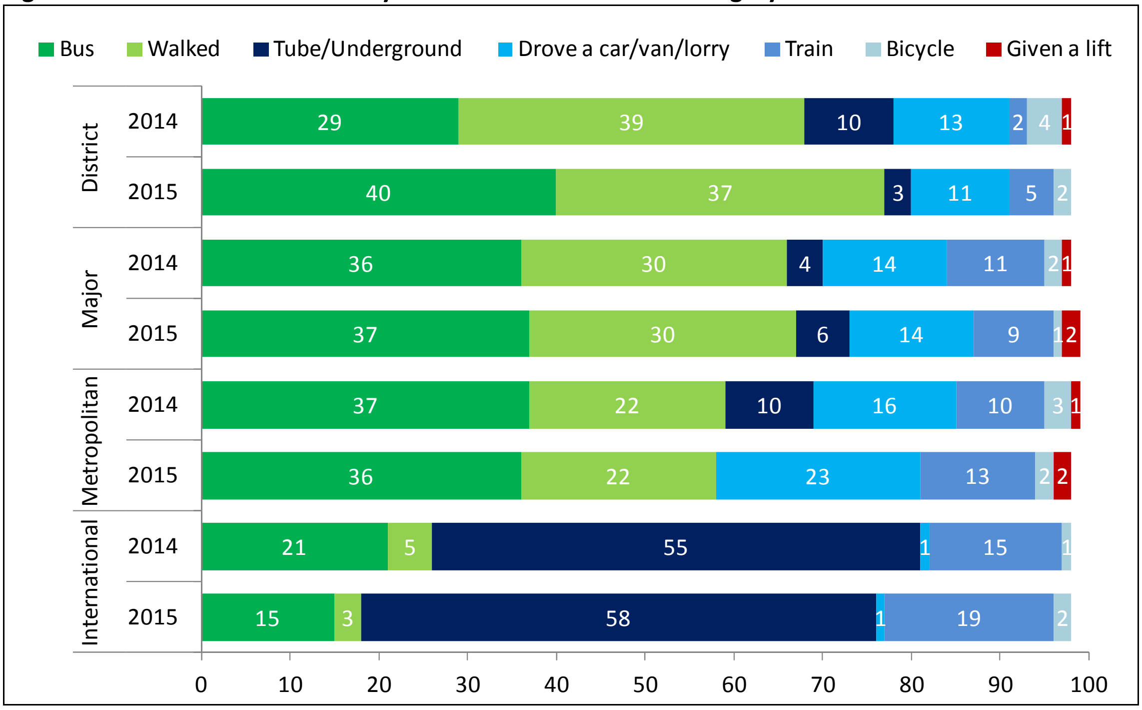
Figure 9 shows that the most popular means of transport used to reach the International centre (Oxford Street/Regent Street) was the Tube (58% in 2015 and 55% in 2014). Bus use fell and train use increased between 2014 and 2105.

For Major and District centres the two main means of access were bus and on foot although there has been a large fall in bus as an access mode for District centres between 2014 and 2015.

[6] Weighted average of 72% who live within 10 minutes walk and 44% who live and work within 10 minutes walk

[7] Modes mentioned by 1% or more in any cell

Figure 9: Mode of access to area by London Plan town centre category: 2015 v 2014



Weighted base: International: 2015, 299; 2014, 294; Metropolitan: 2015, 1222; 2014, 892; Major: 2015, 2107; 2014, 1761; District: 2015, 596; 2014, 589

Walking was the predominant means of accessing the town centre in Harlesden (46%), Walthamstow (38%) and Wimbledon (31%). Tube was the predominant means of accessing Oxford Street/Regent Street (58%). At all other centres bus was the predominant means of access.

Bus use was highest in Hayes and Woolwich (45%), Ilford (43%) and Eltham (41%) and lowest in Oxford Street/Regent Street (15%). This represents a large decrease in bus use from the 21% in 2014 but closer to the 12% in 2013. In 2011, 2009 and 2004 it was 24%.

Car use was highest in Bromley (30%), Kingston (29%), Eltham (26%), Romford (21%) and Enfield Town (19%) and very low in Oxford Street/Regent Street (1%), Stratford (6%) and Harlesden (6%).

Train use was highest in Oxford Street/Regent Street (19%), Wimbledon (19%), Romford (15%) and Kingston (14%) and very low in Eltham (1%), Harlesden (4%), Walthamstow (4%) and Woolwich (4%).

Walking as an access mode was highest at Harlesden (46%), Walthamstow (38%), Woolwich (33%), Wimbledon (31%) and Lewisham (30%) and lowest at Oxford Street/Regent Street (3%).

Cycle as an access mode was highest in Kingston (4%), Harlesden (3%) and Wimbledon (3%). See Table 101 in Appendix B for a full breakdown.

Comparison over time

Car use and bus use increased and Train/Tube and bicycle use has decreased since 2014.

	2015	2014	2013	2011	2009	2004
Bus	35%	34%	34%	36%	38%	34%
Walk	27%	27%	27%	28%	25%	29%
Car	16%	14%	12%	14%	16%	20%
Train/Tube	17%	21%	22%	17%	17%	14%
Bicycle	2%	3%	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 most likely to be female, aged 35-59 and have higher household incomes than other mode users. Cyclists were more likely to be male, young, 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	22	38	43	53	38
35-44	24	17	23	14	19
45-59	37	18	24	23	22
60+	17	26	10	10	22
Gender					
Male	36	37	42	75	41
Female	64	63	58	25	59
Employment status					
Working	72	53	76	88	56
Student	2	10	9	5	6
Not working	14	14	7	2	20
Retired	12	23	8	4	19
Ethnic group					
White	74	63	66	78	64
Asian	12	15	14	10	16
Black	11	17	15	3	15
Mixed/Other	3	5	4	9	5
Household income*					
Under £20,000	12	39	13	22	37
£20,000-£34,999	30	39	38	45	35
£35,000-£74,999	46	19	38	33	23
£75,000 or over	12	4	11	0	5
Weighted base	**738**	**1,497**	**739**	**69**	**1,136**

* after excluding don't knows and refusals

Why Modes used

The reasons for choosing to travel by the particular mode used to access the area are shown in Table 8 for 2015 and 2014. Train/Tube in particular were considered to be quicker (69% in both phases), as were car (49% in 2015, 43% in 2014) and bicycle (60% in 2015, 45% in 2014). Train/Tube was considered to be more direct (40% in 2015, 35%

in 2014) than other modes. Car was considered to be easier/more convenient than other modes.

A high proportion travelled by bus because it was cheaper (33% in 2015, 31% in 2014), with 14% (10% in 2014) saying it was the only mode available.

Forty per cent of those who walked said they lived close by (33% in 2014) and about a quarter said they need/enjoy the exercise.

Forty three per cent of those who cycled cited low cost (38% in 2014), 37% said they need/enjoy the exercise (42% in 2014).

Table 8: Reasons for using chosen method of transport rather than any other method of transport to access area by mode: 2015 v 2014

	Car		Bus		Train/Tube		Bicycle		Walk	
	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %
Quicker	49	43	27	32	69	69	60	45	33	36
Easier/more convenient	43	39	29	25	24	24	31	26	14	11
More direct	28	29	26	24	40	35	17	19	23	19
Cheaper/less expensive	11	9	33	31	9	8	43	38	21	18
Live very close by	1	2	4	3	*	*	5	3	40	33
More relaxing/comfortable	15	17	11	6	10	8	10	13	5	4
Need/enjoy exercise/healthy	*	*	1	1	1	*	37	42	26	23
Had heavy bags/shopping to carry	14	13	4	2	1	1	0	2	1	*
Going to more than one place	14	16	3	1	4	4	3	9	3	2
Avoids parking difficulties	1	*	5	6	5	4	3	11	2	3
Only method possible	2	3	14	10	7	6	1	1	3	1
No car/can't drive	*	*	9	9	1	2	3	1	1	2
Travelling with children	4	4	2	1	2	1	0	*	1	1
Weather issues	1	5	1	2	*	2	15	4	5	4
Safer	3	4	4	5	4	8	3	*	1	1
Avoid the congestion charge	*	*	*	*	1	1	0	*	*	*
Weighted base	**738**	**524**	**1,497**	**1,201**	**739**	**720**	**69**	**95**	**1,136**	**971**

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

* = less than 0.5%

Key: 1st 2nd 3rd

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:** Easier/more convenient (28%)
- **bus:** cheaper/less expensive (22%)
- **train/Tube:** quicker (51% in 2015, 54% in 2014)
- **cycle:** cheaper/less expensive (19% in 2015, 24% in 2014)
- **walk:** live very close by (34% in 2015, 29% in 2014).

Table 9: Main reason for using chosen method of transport rather than any other method of transport to access area: 2015 v 2014

	Car		Bus		Train/Tube		Bicycle		Walk	
	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %
Quicker	26	26	13	19	51	54	32	22	15	21
Easier/more convenient	28	28	18	17	9	13	16	15	5	7
More direct	11	10	15	14	21	16	2	1	9	8
Cheaper/less expensive	4	4	22	22	4	3	19	24	10	10
Live very close by	*	*	1	1	*	*	3	*	34	29
Only method possible	1	2	11	9	6	4	0	1	1	1
Need/enjoy exercise/healthy	0	*	*	*	*	*	13	23	19	15
More relaxing/comfortable	5	6	4	2	3	3	2	1	2	2
No car/can't drive	*	*	6	7	*	1	3	1	*	1
Had heavy bags/shopping to carry	7	7	2	1	1	*	0	1	*	*
Avoids parking difficulties	*	*	3	5	2	1	3	3	1	1
Going to more than one place	8	10	1	1	2	2	1	6	1	1
Travelling with children	2	2	1	*	*	*	0	*	*	*
Weather issues	*	2	*	1	*	*	3	2	2	2
Safer	1	1	*	*	*	*	0	*	*	*
Avoid the congestion charge	*	*	0	*	1	*	0	*	0	*
Weighted base	**738**	**524**	**1,497**	**1,201**	**739**	**720**	**69**	**95**	**1,136**	**971**

* = less than 0.5%

Key: 1st 2nd 3rd

Other modes of transport sometimes used

Over four in ten (44% in 2015, 40% in 2014) did not use any modes other then the one they used to access the town centre.

Bus was the most used 'other' mode: about a quarter overall. About half of those who accessed the town centre on foot sometimes used the bus as did about four tenths of those who cycled or used train/Tube and three tenths who drove.

Table 10: Other modes used to town centre, by mode used: 2015 v 2014

	Total		Car		Bus		Train/Tube		Bicycle		Walk	
	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %
No other mode used	44	40	51	52	46	38	40	39	27	22	39	37
Bus	26	25	29	27			39	35	40	37	50	45
Car/van/lorry	10	11	*	*	17	16	10	8	12	12	8	13
Train	10	9	11	9	17	15	6	3	6	7	4	6
Walk	9	11	8	10	17	19	6	12	17	22		
Tube	5	9	3	5	7	13	7	5	9	17	3	9
Taxi/minicab	3	1	3	1	5	2	5	1	0	*	2	1
Bicycle	2	3	3	2	2	3	1	3			2	6
Other	1	2	1	2	1	3	1	2	5	4	1	1
Weighted base	**4,224**	**3,536**	**738**	**524**	**1,497**	**1,201**	**739**	**720**	**69**	**95**	**1,136**	**971**

* = less than 0.5%

Frequency of mode use

Half of those who walked to the town centre walked there five or more days a week in 2015, an increase on the 45% in 2014.

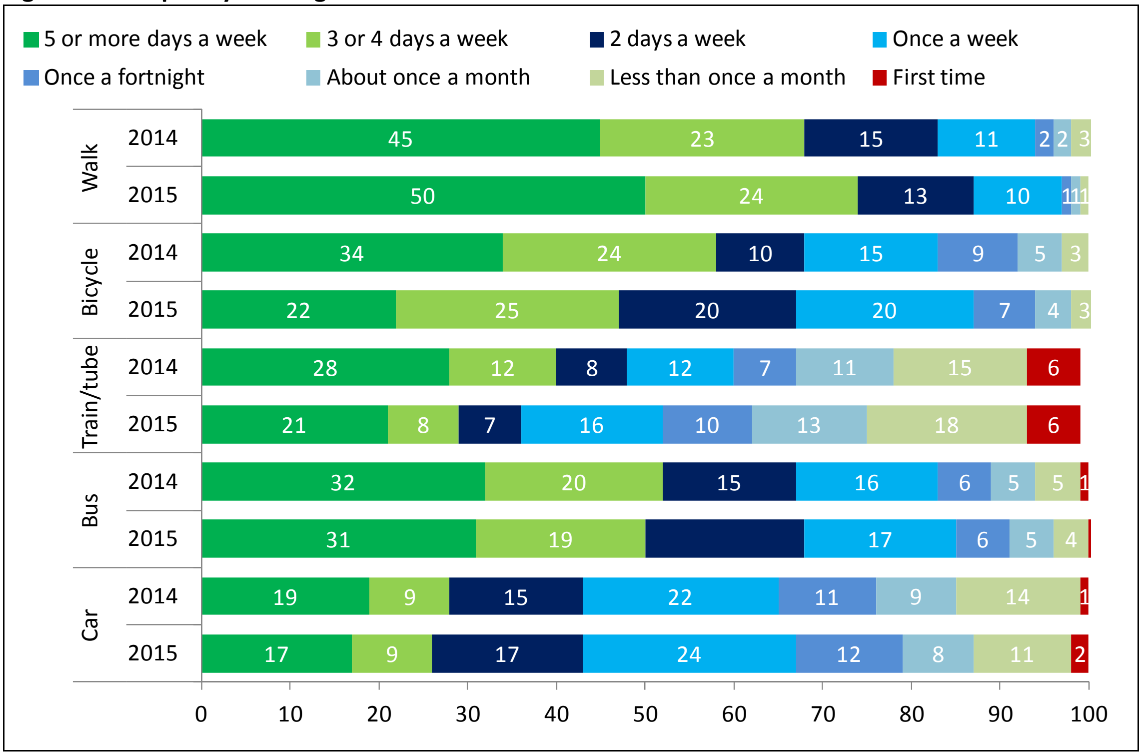
Car was the mode used least frequently (17% five or more days a week in 2015, 19% in 2014).

The weekly mean frequency for the different modes for 2015 and 2014 were:

	2015	2014
• Walk	4.0	3.7
• Bicycle	2.7	3.1
• Bus	3.0	3.0
• Train/tube	1.9	2.3
• Car	1.9	2.0

The frequency of walk increased between 2014 and 2015 whereas the frequency of bicycle, train/tube and car decreased.

Figure 10: Frequency of using mode to travel to this area: 2015 v 2014



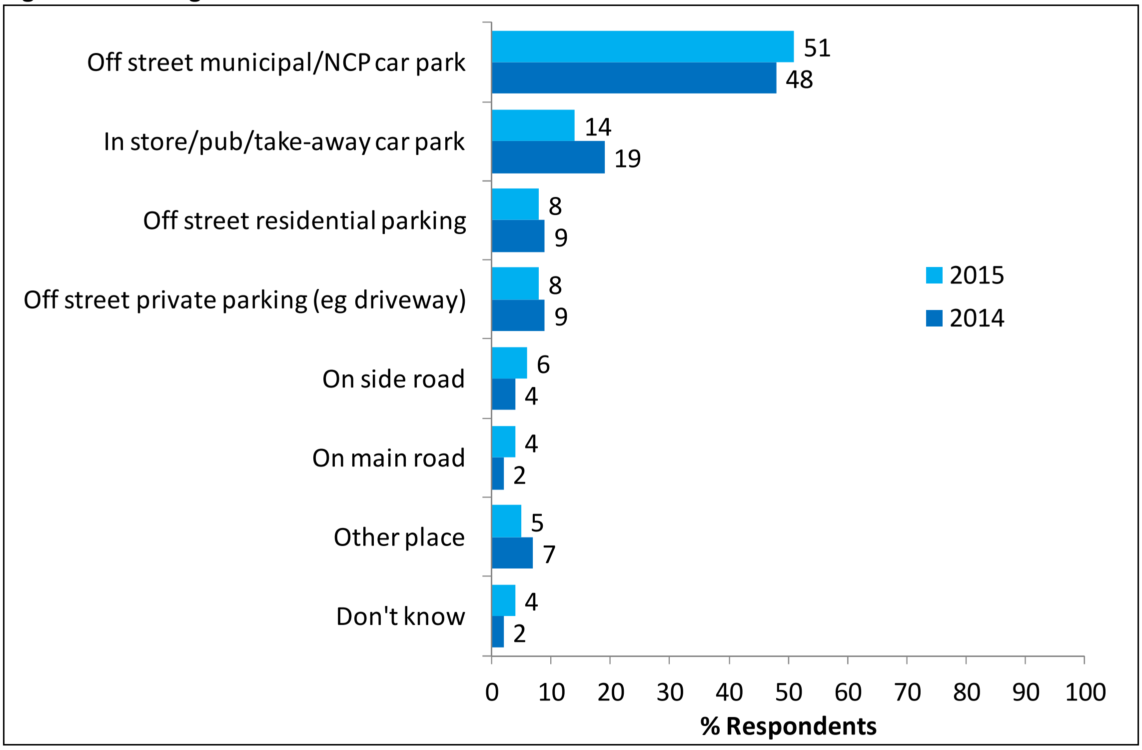
Weighted base: Car: 2015, 738; 2014, 524; Bus: 2015, 1497; 2014, 1201; Train/tube: 2015, 739; 2014, 720; Bicycle: 2015, 69; 2014, 95; Walk: 2015, 1136; 2014, 971

Parking

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

Over half (51%) had parked in an off-street municipal/NCP car park. Fourteen per cent parked in a store/pub/take-away car park. Figure 11 shows the parking locations for 2015 and 2014.

Figure 11: Parking location: 2015 v 2014



Weighted base: Those who had driven to area; 2015: 735; 2014: 524

Car users to Metropolitan town centres were significantly more likely to park in an off street municipal or NCP car park than visitors to Major or District town centres: 63% compared to 43% and 36% respectively.

Car users to Major town centres were more likely to park in a store/pub/take-away car park than visitors to Metropolitan and District town centres (20% compared to 9% and 12% respectively).

Car users to all centres except Eltham and Stratford[8] were most likely to park in an off street municipal or NCP car par, particularly at Romford (69%), Enfield Town (66%), Kingston (62%), Bromley (61%) and Woolwich (57%).

Car users to Eltham and Stratford were most likely to park in a store/pub/take-away car park (35% and 34% respectively).

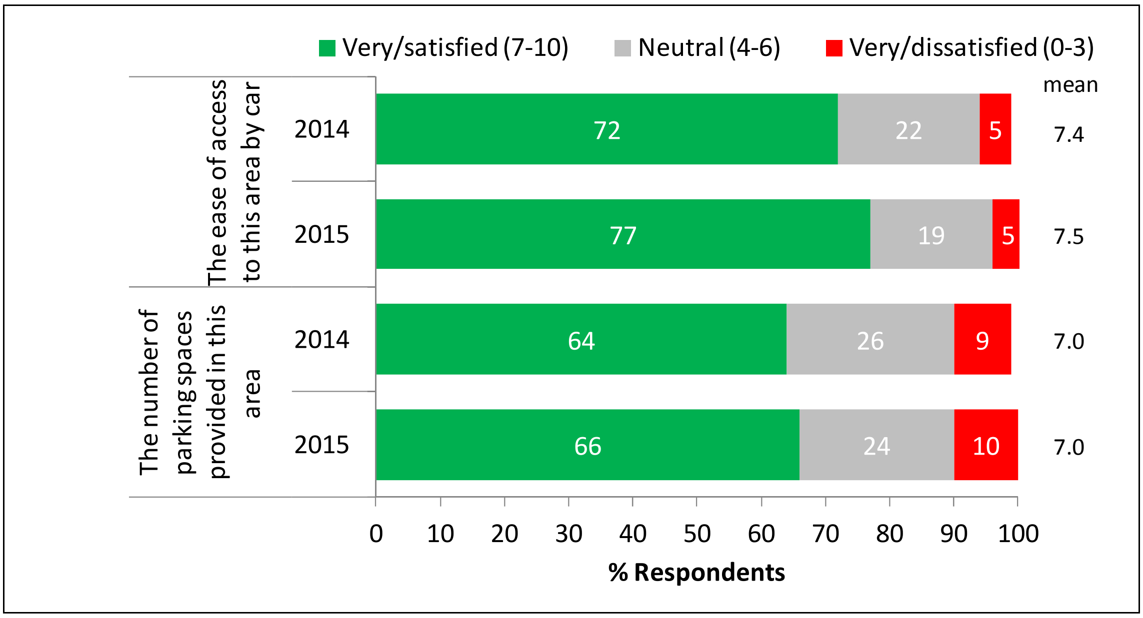
23% of car users at Walthamstow parked on side roads.

[8] Excluding Oxford Street/Regent Street as only four parked there

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 7.0 respectively on a scale from 0, very dissatisfied to 10, very satisfied in 2015) as shown in Figure 12.

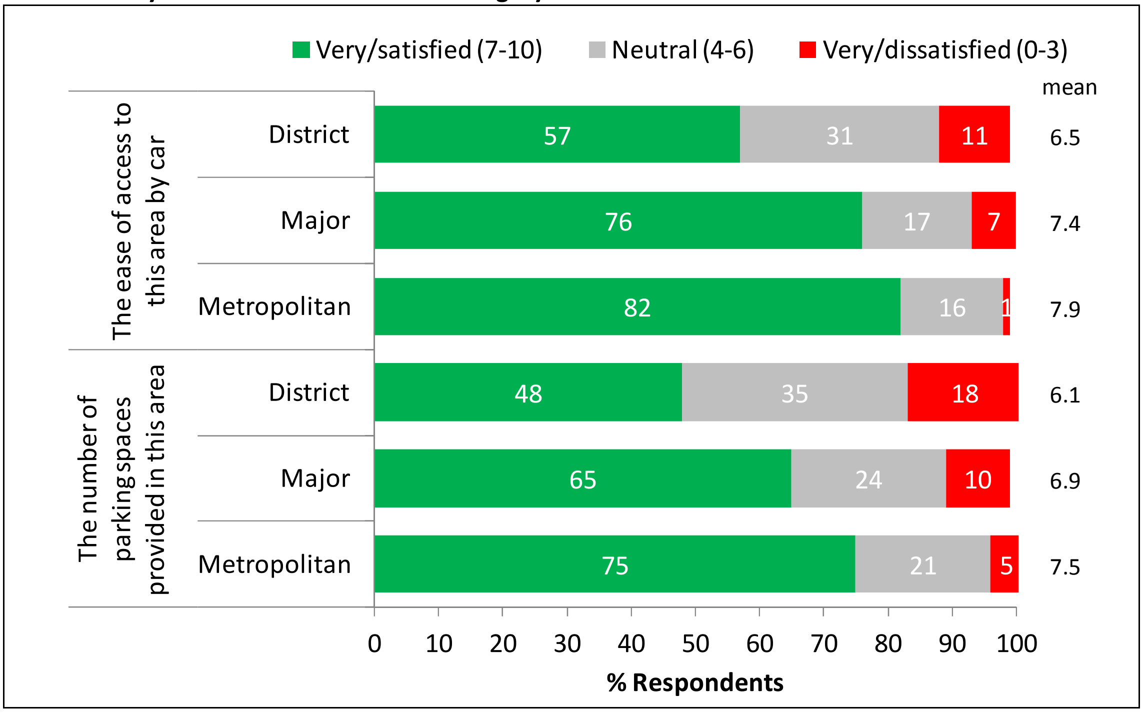
Figure 12: Satisfaction with ease of access to the area by car and number of parking spaces provided in this area: 2015 v 2014



Weighted base: Those who had driven to area; 2015: 735; 2014: 524

Car drivers to Metropolitan town centres were more satisfied with both the ease of access to their area by car and the number of parking spaces and visitors to District town centres were least satisfied with both.

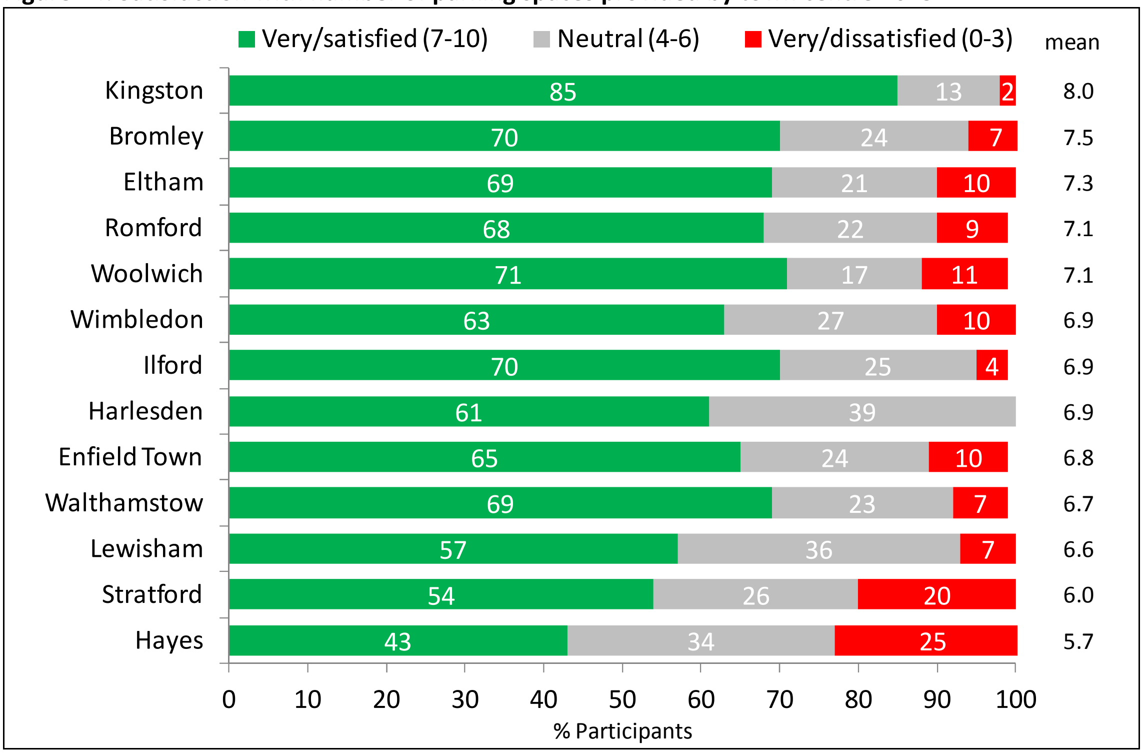
Figure 13: Satisfaction with ease of access to the area by car and number of parking spaces provided in this area by London Plan town centre category: 2015



Weighted base: those who had driven to area: Metropolitan 317, Major 344, District 72

In 2015, the least satisfied with the number of parking spaces were drivers at Hayes (mean score 5.7) and Stratford (6.0) and the most satisfied with the number of parking spaces were drivers at Kingston (mean score 8.0) and Bromley (7.5).

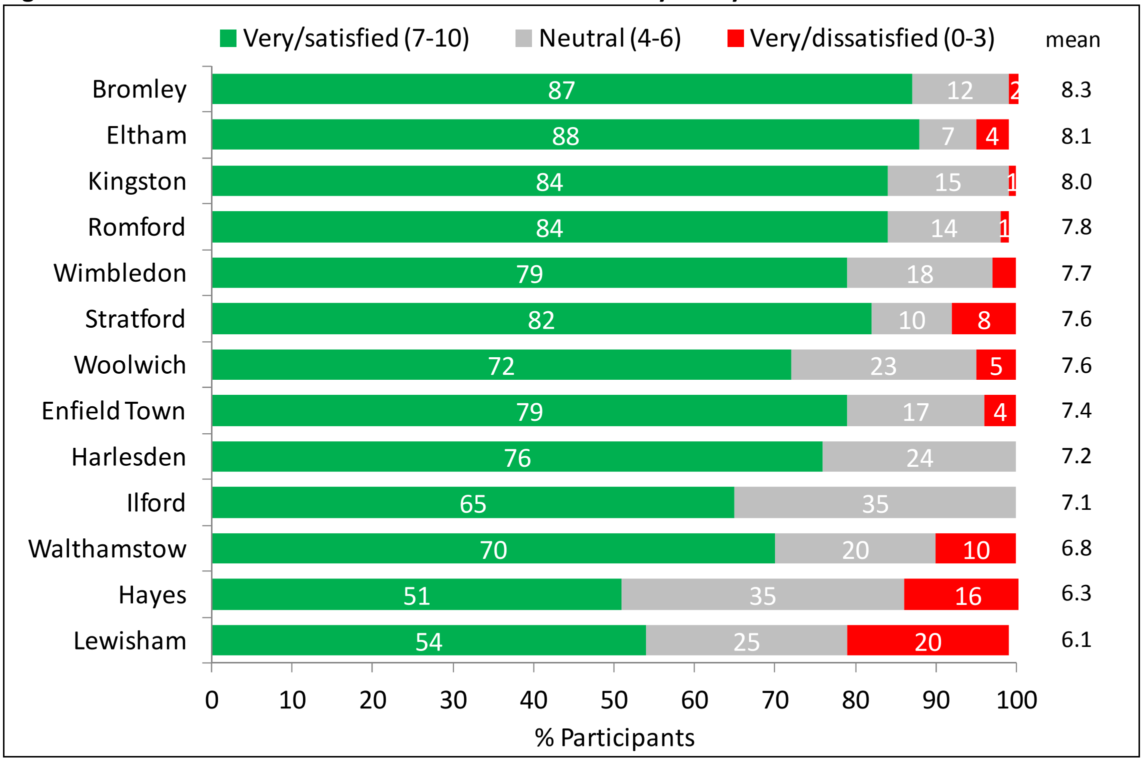
Figure 14: Satisfaction with number of parking spaces provided by town centre 2015



Weighted base: Hayes 110, Stratford 64, Lewisham 52, Walthamstow 21, Enfield Town 45, Harlesden 94, Ilford 43, Wimbledon 42, Woolwich 69, Romford 24, Eltham 39, Bromley 42, Kingston 43

The least satisfied with the ease of access to the town centre were drivers at Lewisham (mean score 6.1) and Hayes (6.3) and the most satisfied with ease of access to the town centre were drivers at Bromley (mean score 8.3), Eltham (8.1) and Kingston (8.0).

Figure 15: Satisfaction with ease of access to town centre by car by town centre 2015



Weighted base: Hayes 110, Stratford 64, Lewisham 52, Walthamstow 21, Enfield Town 45, Harlesden 94, Ilford 43, Wimbledon 42, Woolwich 69, Romford 24, Eltham 39, Bromley 42, Kingston 43

3.6 Attitudes to and Use of Bus

Summary

Over three quarters (78% in 2015 and 76% in 2014) sometimes use the bus to travel in the area of the town centre.

Bus use is largely unchanged compared to twelve months ago. There was a 1% increase in those that travel by bus at least once a week (from 52% to 53%) but and a 1% decrease in those using buses five or more days a week.

Bus customers were most positive about the ease of getting on and off the bus (mean score of 8.06[9]) and the convenience of bus stops (7.98). Bus users were least satisfied with the level of crowding on the bus (7.35). Ratings for all aspects are at their highest level.

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

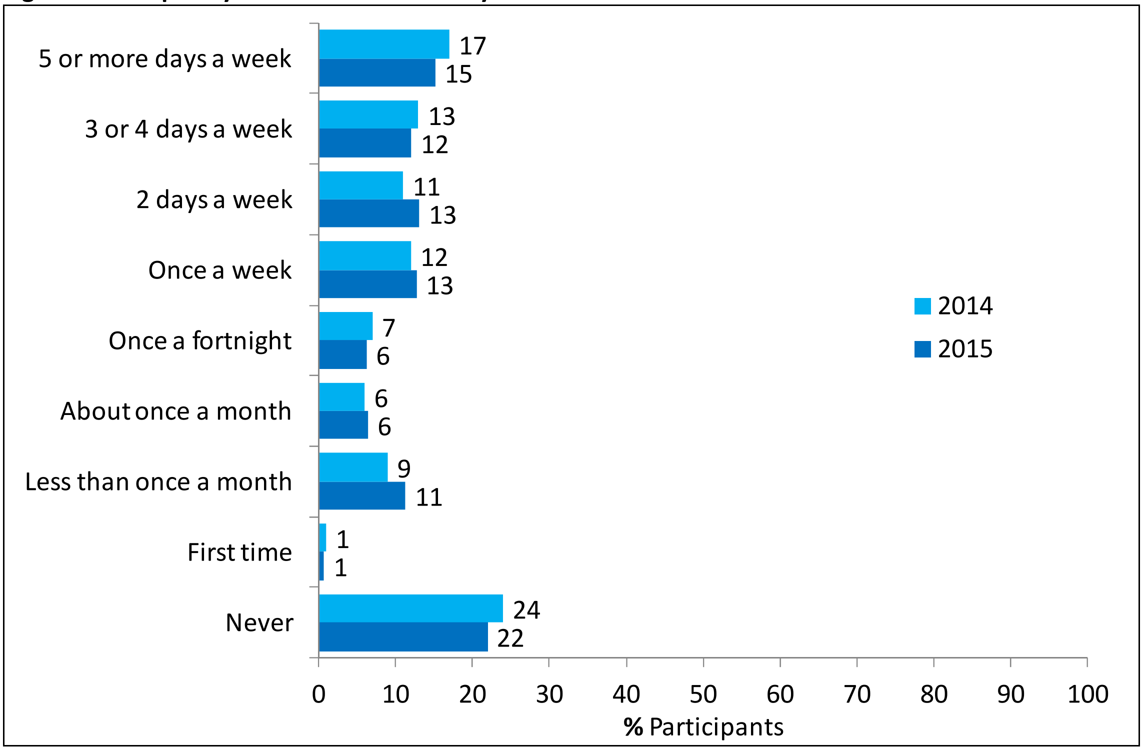
The top four factors that would encourage greater use of the bus were more regular/frequent buses (17%), more reliable buses (15%), faster journeys (13%) and direct bus routes (11%).

Frequency buses used to travel in town centre

Over three quarters (78% in 2015 and 76% in 2014) sometimes used the bus to travel in the area of the town centre, even if they did not do so on the day of interview.

Over half the sample (53% in both 2015 and 2014) used bus in the area at least once a week.

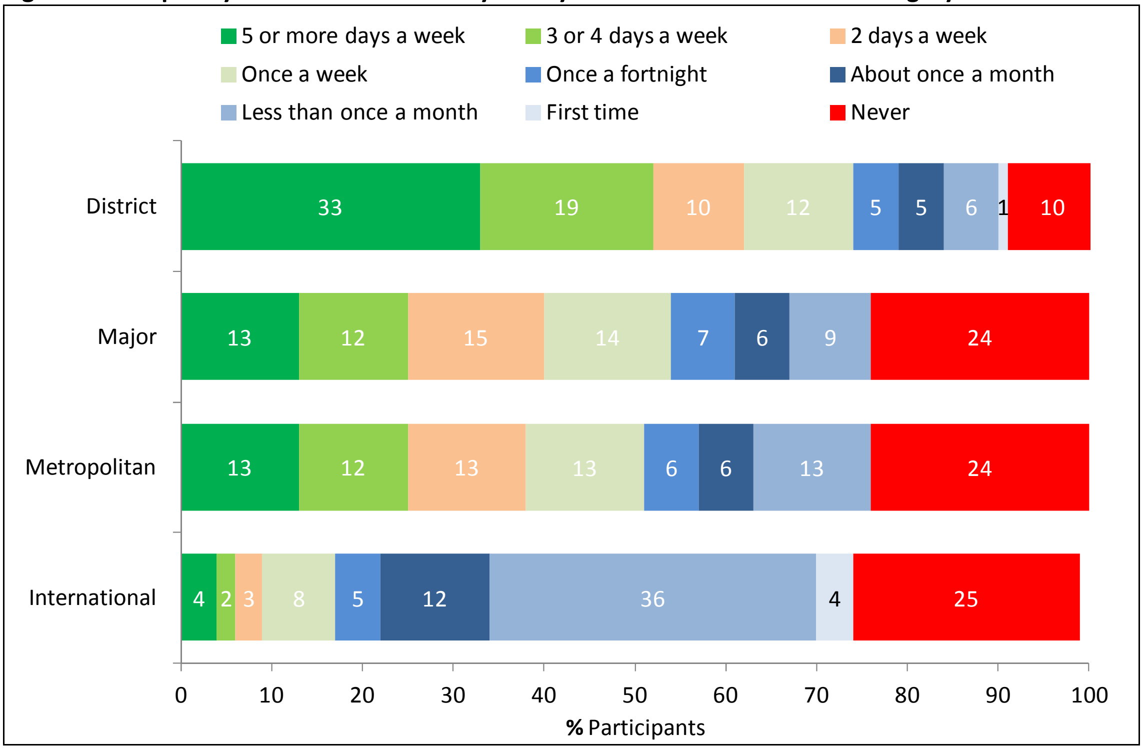
Figure 16: Frequency of travel in the area by bus: 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536

Frequency of using the bus was significantly different by type of town centre. Bus use was highest and most frequent in District town centres: 90% sometimes used the bus and 74% use the bus at least once a week. Bus use was lowest and least frequent in the International town centre (75% sometimes used the bus, 17% use the bus at least once a week).

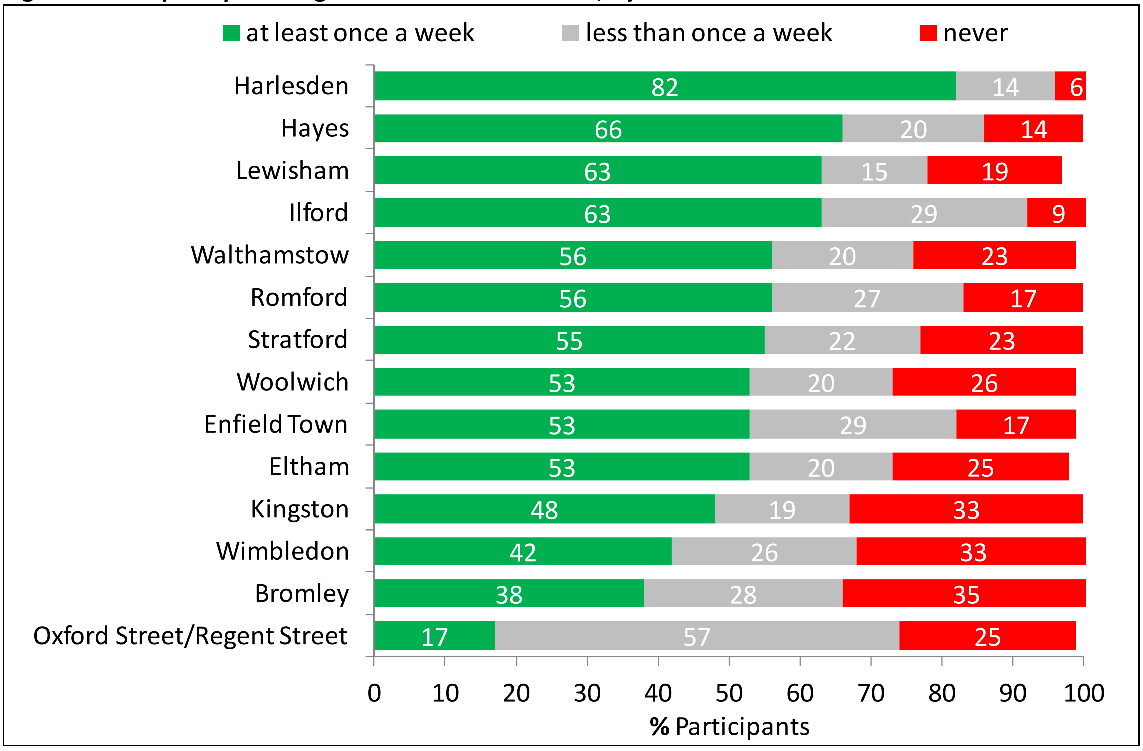
Figure 17: Frequency of travel in the area by bus by London Plan town centre category: 2015



Weighted base: International 299; Metropolitan: 1222; Major: 2107; District: 596

Bus use was highest in Harlesden with 82% sometimes using the bus to travel in the area. Bus use was also very high in Hayes, Lewisham and Ilford. Bus use was lowest in Oxford Street/Regent Street.

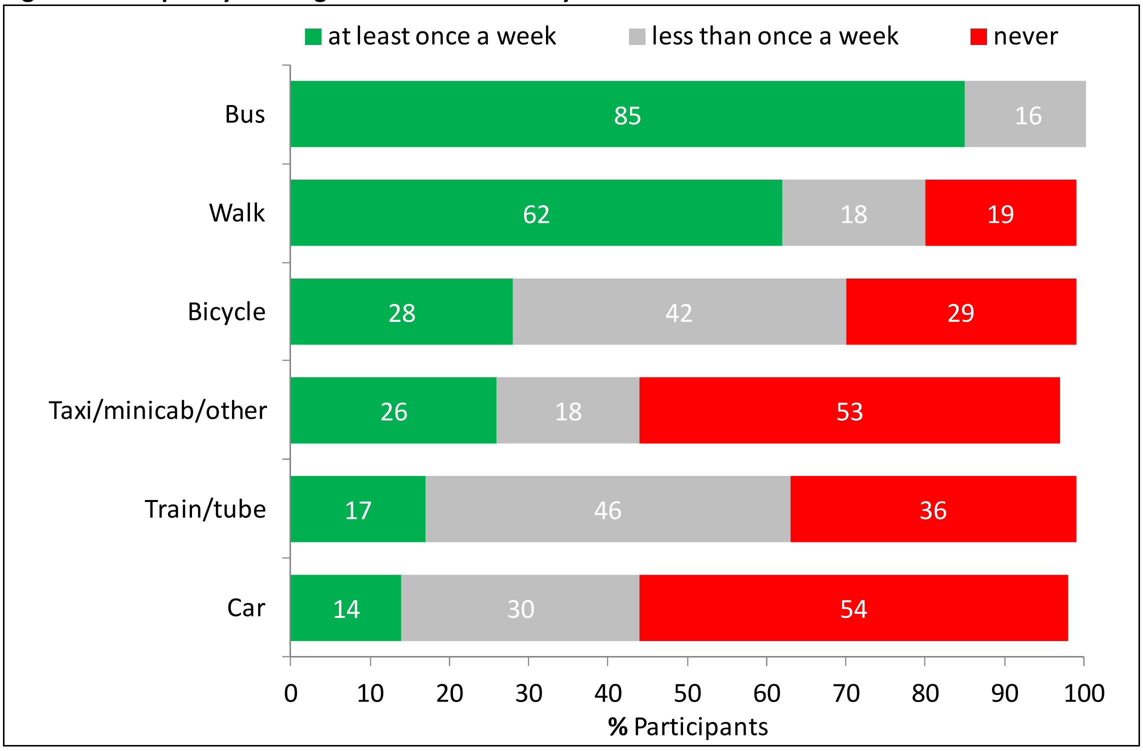
Figure 18: Frequency of using bus to travel in the area, by town centre 2015



Weighted base: Bromley 302, Eltham 304, Enfield Town 316, Hayes 302, Harlesden 294, Ilford 298, Kingston 317, Lewisham 311, Oxford Street/Regent Street 299, Romford 304, Stratford 297, Walthamstow 295, Wimbledon 295, Woolwich 289

Those who travelled to the town centre by bus on the day of interview were the most frequent users of bus overall: 85% used bus at least once a week. Over half who accessed the town centre on foot (62%) also used the bus at least once a week. Car users were least likely to use the bus.

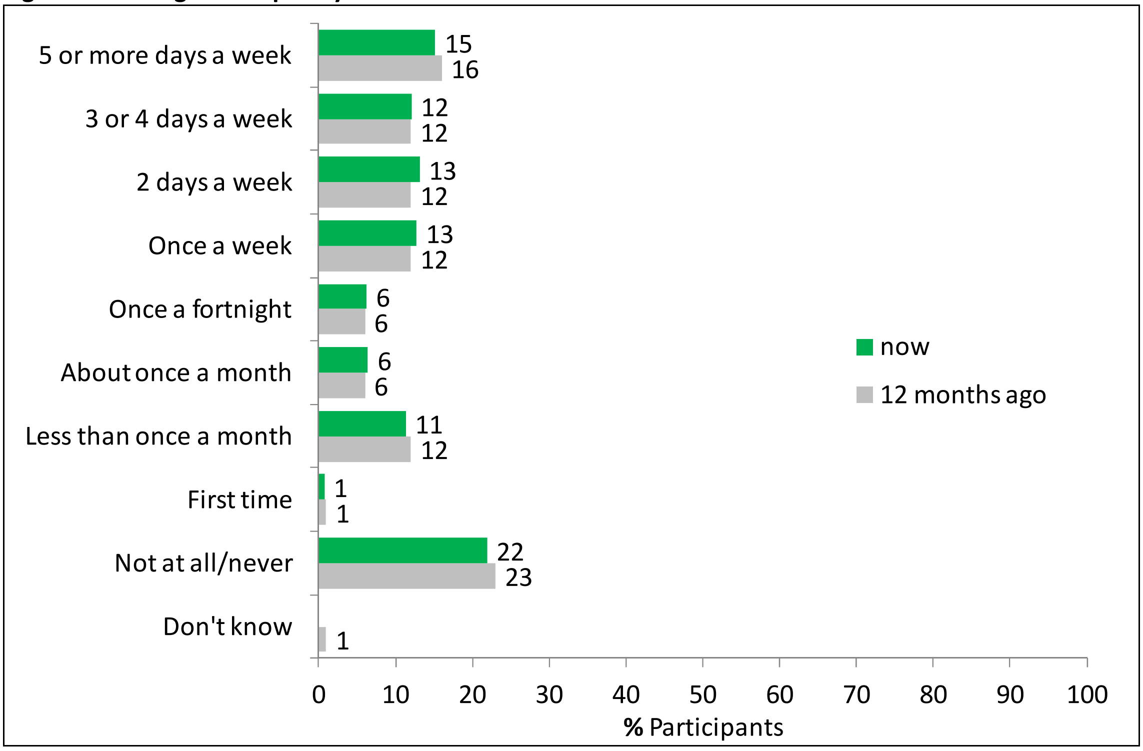
Figure 19: Frequency of using bus in town centre by mode used 2015



Weighted base: car 738, bus 1,497, train/Tube 739, bicycle 69, walk 1,136, taxi/minicab/other 46

Bus use is more or less unchanged compared to the claimed frequency of use of twelve months ago as shown in Figure 20. There was a 1% increase in those that travel by bus at least once a week (from 52% to 53%) but and a 1% decrease in those using buses five or more days a week.

Figure 20: Change in frequency of bus use in area 2015



Weighted base: all respondents: 4,224

Bus users' satisfaction

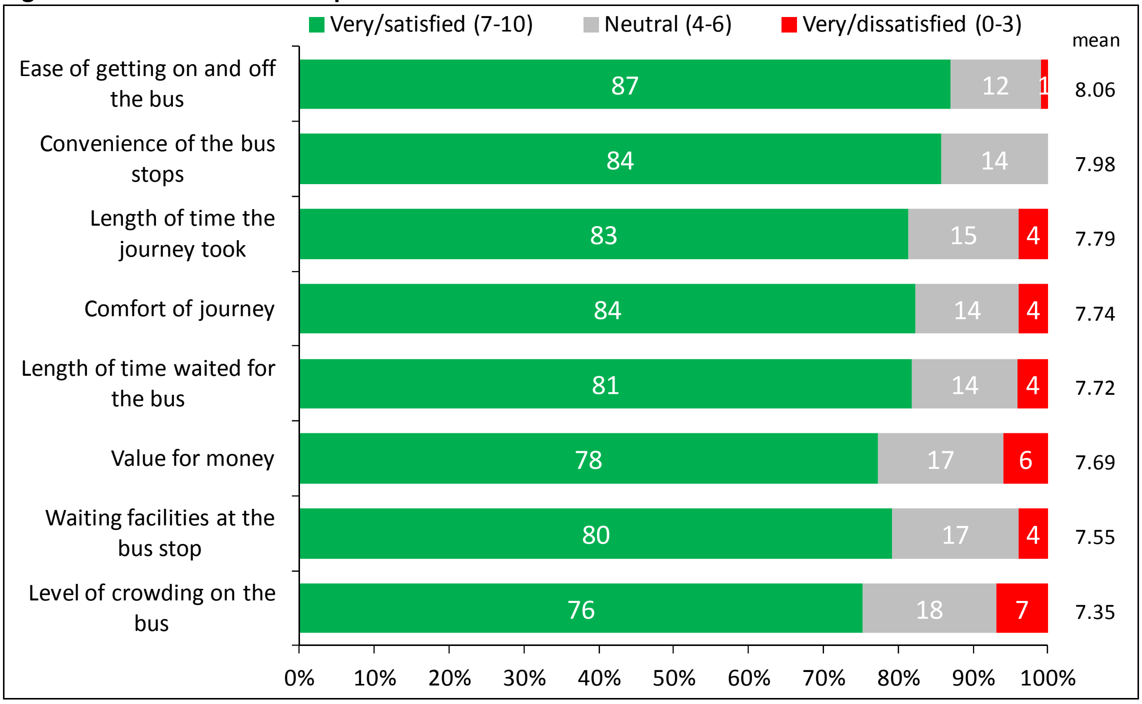
Those who travelled to the area by bus on the day of interview were asked about their satisfaction with the following eight aspects of the bus journey:

- 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.

Although generally positive about all the different aspects of travel by bus in the area, bus users were least satisfied with the level of crowding on the bus (mean score of 7.35 in 2015 on a scale of 0 to 10 were 0 = very dissatisfied and 10 = very satisfied) and waiting facilities at the bus stop (mean score of 7.55). Bus customers were most positive about the ease of getting on and off the bus (mean score of 8.06) and the convenience of bus stops also scored highly (mean score 7.98).

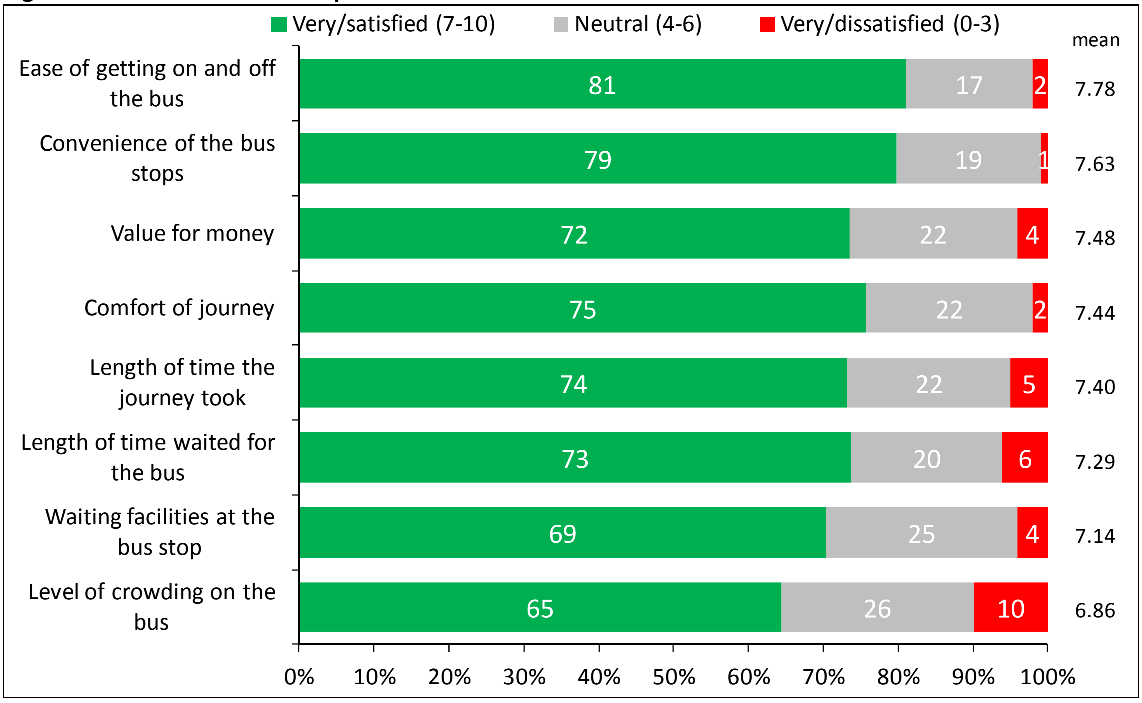
All aspects are rated higher on the 2015 survey then the 2014 survey. The 2015 data is shown in Figure 21 and the 2014 data in Figure 22.

Figure 21: Satisfaction with aspects of bus travel in the area 2015



Base: 1,497 who travelled by bus

Figure 22: Satisfaction with aspects of bus travel in the area 2014



Base: 1,201 who travelled by bus

Bus users in Kingston gave the highest scores for all aspects except ‘length of time the journey took’ where the highest score was in Wimbledon.

In addition to Kingston and Wimbledon, bus users in, Stratford and Enfield Town also gave high ratings for bus services.

Those in Ilford, Lewisham, Harlesden and Bromley were least satisfied.

Analysis by type London Plan town centre category shows that those in the International town centre (Oxford Street/Rgeent Street) have the highest satisfaction scores for all aspects except 'ease of getting on and off the bus', 'convenience of the bus stops' and 'length of time the journey took' where Major town centres have the highest scores.

Table 11: Summary of means scores for aspects of travel by bus in area by London Plan town centre category 2015

	International	Metro-politan	Major	District
Ease of getting on and off the bus	7.72	8.00	8.18	7.88
Convenience of the bus stops	8.02	7.91	8.08	7.80
Length of time the journey took	7.68	7.78	7.84	7.70
Comfort of journey	7.99	7.81	7.70	7.69
Length of time waited for the bus	7.95	7.64	7.80	7.58
Value for money	7.84	7.61	7.76	7.57
Waiting facilities at the bus stop	7.83	7.58	7.52	7.55
Level of crowding on the bus	7.77	7.32	7.29	7.53

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

Comparison over time

All aspects are at their highest level with particularly large improvements in satisfaction for 'length of time waited for bus', 'length of time the journey took' and 'level of crowding on the bus'.

	2015	**2014**	**2013**	**2011**	**2009**	***2004***
Ease of getting on and off the bus	8.1	7.8	8.0	7.9	7.9	*7.9*
Convenience of the bus stops	8.0	7.6	7.7	7.7	7.8	*7.8*
Length of time the journey took	7.8	7.3	7.5	7.5	7.4	*7.2*
Comfort of journey	7.7	7.4	7.4	7.3	7.3	*7.0*
Length of time waited for the bus	7.7	7.1	7.2	7.3	7.4	*6.7*
Value for money	7.7	7.5	6.8	6.9	7.3	*7.4*
Level of crowding on the bus	7.4	6.9	7.0	6.8	6.8	*6.6*

Encouraging More Bus Use

Forty one per cent mentioned some improvements that could encourage (greater) bus use. This is a 5% fall compared to the 46% in 2014.

Making buses more regular (17% in 2015, 16% in 2014), more reliable buses (15% and 12%), faster journeys (13% and 16%) and direct bus routes (11% and 13%) were the most frequently suggested ways in which bus use could be encouraged as shown in Table 12. 2.4 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 (9% in 2015, 10% in 2014), more reliable buses (6% and 4%) and faster journeys (6% in both years).

Table 12: Factors that would encourage use of buses more often: 2015 v 2014

	2015		2014	
	All mentions %	Main factor %	All mentions %	Main factor %
Nothing	59	59	54	54
More regular/frequent buses	17	9	16	10
More reliable buses	15	6	12	4
Faster journey	13	6	16	8
Direct bus route	11	6	13	6
Lower fares	6	4	7	6
More comfortable journey	5	2	3	1
More information about buses	5	1	4	1
More seats on buses/less crowded buses	4	1	3	1
Cleaner buses	4	1	3	*
More shelters at bus stops	3	*	2	*
More seating at bus stops	3	1	2	*
Greater priority given to buses	2	*	3	*
Reduce number of cars on the road/less congestion	2	1	3	1
Bus stops feel safer	2	*	n/a	n/a
Safer buses	2	*	4	1
Stricter enforcement of illegal parking in bus lanes	1	*	1	*
Bus stop nearer home/destination	1	*	2	1
Improved ease of getting on and off buses	1	*	1	*
Make children behave/school buses	1	*	2	1
Greener buses	1	*	1	*
Other	1	1	3	3
Weighted base	**4,224**	**4,224**	**3,536**	**3,536**

* = less than 0.5%

Analysis by London Plan town centre category shows that ‘more reliable’ and ‘more regular/frequent buses’ are the main factors that would encourage more bus use in the District category of town centres and ‘faster journeys’ is the main factor that would encourage more bus use in the International category.

Table 13: Main factors that would encourage use of buses more often by London Plan town centre category 2015

	International %	Metropolitan %	Major %	District %
Nothing	57	57	63	47
More regular/frequent buses	10	9	9	12
More reliable buses	5	7	5	13
Faster journey	12	6	6	4
Direct bus route	6	7	5	4
Weighted base	**299**	**1,222**	**2,107**	**596**

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

Over six tenths in Woolwich (77%), Bromley (73%) and Barking (70%) said nothing would encourage them to use buses more. By contrast, 62% in Harlesden, 58% in Ilford and 51% in Romford mentioned aspects that would encourage more bus use.

‘More regular/frequent buses’ was most mentioned in Harlesden (19%) and Wimbledon (16%).

‘More reliable buses’ was most mentioned in Harlesden (13%), Hayes (12%) and Ilford (11%).
‘Faster journey’ was most mentioned in Oxford Street/Regent Street (12%) and Enfield Town (11%).

‘Direct buses’ was most mentioned in Ilford, Kingston and Eltham (8% each).

3.7 Encouraging Cycling

Summary

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

65% of non cyclists said nothing would encourage them to cycle. The three main improvements which would encourage cycling amongst non cyclists were ‘more cycle lanes on the roads’ (18%), ‘more dedicated cycle paths’ (16%) and ‘less road traffic’ (9%).

Non cyclists (ie those who never cycled to the town centre) were shown a screen with the following list of potential improvements and asked which would encourage them to cycle more often in the area. Cyclists were shown a similar list and asked which of them encouraged or influenced their choice to cycle there that day.

Non cyclists

- (More) cycle lanes on the roads
- (More) dedicated cycle paths
- Better cycle routes to / through the town centre
- 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

Cyclists

- Cycle lanes on the roads
- Dedicated cycle paths
- Cycle routes to / through the town centre
- Little road traffic
- Free on-road cycle training
- Bicycle hire scheme
- Bicycle parking facilities in this area
- Bicycle parking facilities at / near your home

Over a third (35%) of non cyclists in both years mentioned at least one thing that might encourage them to cycle more often in the area.

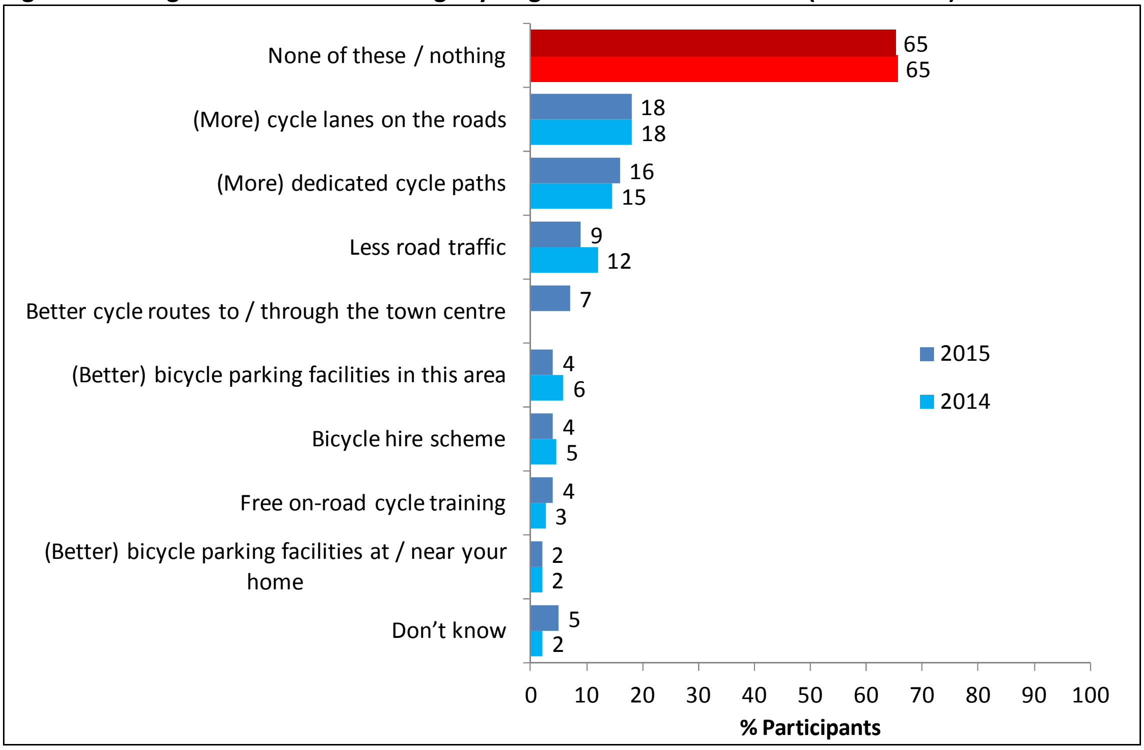
The three main improvements were 'more cycle lanes on the roads' (18% in both years), 'more dedicated cycle paths' (16% in 2015, 15% in 2014) and 'less road traffic' (9% in 2015, 12% in 2014).

Overall, 65% said nothing would encourage them to cycle.

Around three quarters of non cyclists at Hornchurch (76%), Woolwich (76%) and Eltham (75%) said nothing would encourage them to cycle. Non cyclists at the following town centres were most likely to mention one or more things that would encourage them to cycle: Enfield (47%), Ilford (47%) and Hayes (41%).

'(More) cycle lanes on the roads' was mentioned most in Enfield Town (30%), '(More) dedicated cycle paths', 'less road traffic' and '(Better) cycle routes to/through the town centre' were mentioned most in Ilford (25%, 16%, and 14% respectively).

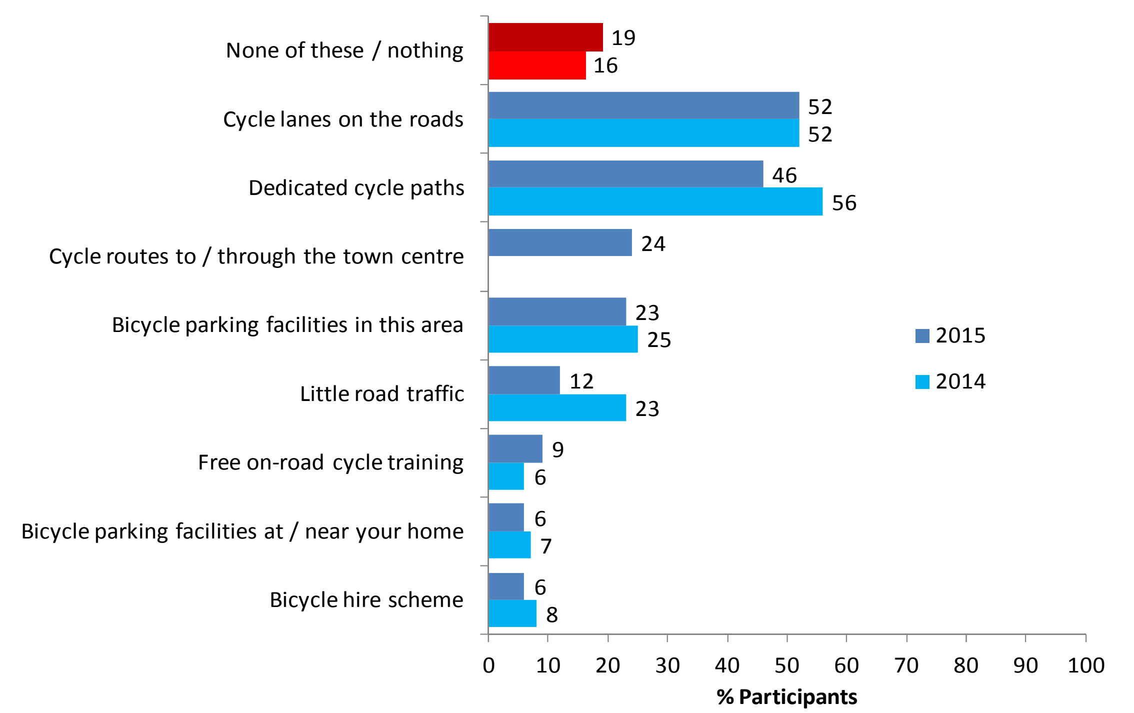
Figure 23: Things which would encourage cycling more often in this area (2015 v 2014)



Note: 'better cycle routes to/through the town centre' was added in 2015 survey
Note: 2014 data excludes cyclists
Weighted base: non cyclists: 2015: 4,075, 2014: 3,416

The main things that encouraged or influenced cyclists' choice of mode that day were 'cycle lanes on the roads' (52% in both years), 'dedicated cycle paths' (46% in 2015, 56% in 2014), 'cycle routes to/through the town centre' (24% in 2015), 'bicycle parking facilities in the area' (23% in 2015, 25% in 2014).

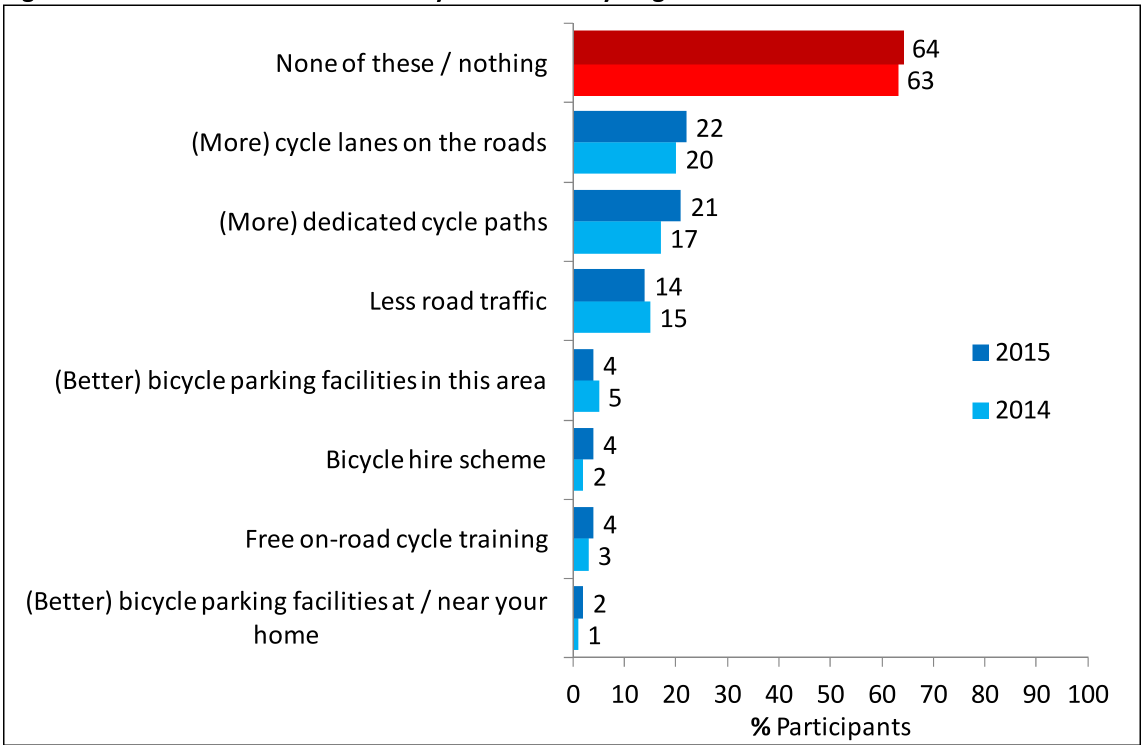
Table 14: Things which encouraged / influenced use of cycle that day



Note: 'cycle routes to/through the town centre' was added in 2015 survey
Note: 2014 labels slightly different
Weighted base: cyclists: 2015: 64, 2014: 95

All participants were then shown a similar list of potential improvements and asked which would make them feel safer cycling in the area. Over a third (36% in 2105, 37% in 2014) mentioned at least one thing that would make them feel safer cycling in the area. The three main improvements were: 'more cycle lanes on the roads' (22% in 2105), 'more dedicated cycle paths' (21%) and 'less road traffic' (14%).

Figure 24: Which of these would make you feel safer cycling in this area: 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536

3.8 Attitudes towards Town Centres

Summary

The main ways that the town centres could be improved were 'better range of shops' (28%), 'more pleasant/greener environment' (25%), 'cleaner streets' (22%) and 'improve shops/better quality shops' (21%). 15% said nothing could be done.

In 2015 73% of town centre visitors felt very safe and 24% felt fairly safe during the day. In 2014, 77% felt very safe and 20% felt fairly safe. Only 26% said they felt very safe and 34% fairly safe during the evening/after dark (31% and 33% respectively in 2014). 21% didn't go out then.

In 2015 a negative balance of 4% of visitors had seen fewer uniformed police officers in the local neighbourhood in the past year: 14% more, 18% less. This is an improvement on the negative balance of 7% in 2014.

Visitors were asked to aspects of the town centre related to the urban realm. The best rated aspects of the town centres overall were 'ease of walking around' and 'graffiti and fly posting'. The worst rated aspects were 'ease of cycling', 'trees and plants' and 'traffic noise'.

The average ratings of the mean scores for the 14 town centres show that, overall, Kingston has the best rating on the aspects followed by Bromley, Harlesden, Hayes and Oxford Street/Regent Street. The three lowest rated town centres are Lewisham, Eltham and Ilford

Improvements to the Town Centre

Visitors were asked in what way the area could be improved. The improvement most often mentioned in both years was 'better range of shops' (mentioned by 28% in 2015 and 29% in 2014)

In 2105 'More pleasant/greener environment' was the second most mentioned improvement up from 5th in 2014.

'Cleaner streets' and 'improve shops/better quality shops' were similarly important in both years.

Fifteen per cent of participants (18% in 2014) thought that there was nothing that could be done to improve the centres.

When asked what was the single most important improvement to be made, 'better range of shops' was the main priority in both years. In 2015 'more pleasant/greener environment' was the second priority whereas 'improve shops/better quality shops', and 'less traffic' were the second priorities in 2014. See Table 15.

Table 15: Priorities for improvements to the area: 2015 v 2014

	All respondents			
	All mentions		Most important	
	2015 %	2014 %	2015 %	2014 %
Nothing	15	18		-
Better range of shops	28	29	13	15
More pleasant/greener environment	25	15	10	4
Cleaner streets	22	18	7	5
Improve shops/better quality shops	21	18	8	8
More public spaces / more seating	19	11	6	2
More leisure facilities	16	13	6	6
Remove undesirable element/more policing	14	9	7	3
Less traffic / lower speed limits	13	18	4	8
Reduce pollution	12	14	2	4
Longer shop opening hours	11	11	3	5
More shops	9	11	3	4
More/easier parking	9	8	3	3
Improve pedestrian environment	8	7	2	1
Better bus service	7	8	2	2
High street should be pedestrianised	6	8	2	2
Improve cycle facilities	4	5	1	2
Improve access to bus stop locations	3	3	0	*
Other	5	7	4	6
Don't know	1	2	1	2
Weighted base	**4,224**	**3,536**	**3,584**	**2,902**

* = less than 0.5%

The improvements were grouped into the following categories:

- Shopping facilities[10]
- Travel and transport[11]
- Environment[12]
- Other[13]

Environment was the main category of improvement in 2015, with 74% mentioning it – a large increase on the 51% in 2104. Shopping facilities was mentioned by 69% in both 2015 and 2014. Travel and transport fell in 2015.

Table 16: Priorities for improvements to the area by category of improvement: 2015 v 2014

	Mentions		Most important	
	2015 %	2014 %	2015 %	2014 %
Environment	74	51	27	15
Shopping facilities	69	69	15	38
Travel and transport	54	64	25	26
Other	30	21	13	11

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

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

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

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

For the International category the highest priority was ‘more pleasant/greener environment’ (13%). Also important were ‘less traffic / lower speed limits’ and ‘more public spaces / more seating.’

For Metropolitan town centres ‘more pleasant/greener environment’ (11%) was the main priority. For Major town centres the main priority was ‘better range of shops’ (16%). For District town centres ‘cleaner streets’ was the main priority.

Table 17: Main priority for improvements in each area by London Plan town centre categories 2015

	Inter-national %	Metro-politan %	Major %	District %
Better range of shops	2	10	16	11
More pleasant/greener environment	13	11	8	11
Improve shops / better quality shops	3	7	9	11
Cleaner streets	3	7	6	13
Remove undesirable element/more policing	2	6	6	12
More leisure facilities	6	7	5	8
More public spaces / more seating	10	4	7	3
Less traffic / lower speed limits	12	3	4	1
More shops	1	2	3	2
Longer shop opening hours	1	5	3	1
More/easier parking	2	5	2	4
Reduce pollution	8	1	2	1
High street should be pedestrianised	3	1	2	1
Improve pedestrian environment	4	1	2	2
Better bus service	2	2	2	3
Weighted base	**223**	**976**	**1,792**	**532**

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 (32% said ‘nothing’), Stratford (27%), Oxford Street/Regent Street (25%), Bromley (21%) and Wimbledon (21%). By contrast the town centres with fewest saying there were no improvements that could be made were Ilford (3%), Woolwich (6%) and Lewisham (7%).

The main improvement at six town centres (Kingston, Oxford Street/Regent Street, Wimbledon, Romford, Enfield Town and Hayes) was a ‘more pleasant/greener environment’.

The main improvement at the following five town centres (Bromley, Walthamstow, Eltham, Woolwich and Ilford) was a ‘better range of shops’.

At Harlesden and Lewisham the main improvement was ‘cleaner streets’. At Stratford and Harlesden[14] the main improvement was ‘remove undesirable element/more policing.’

At Ilford[15] the main improvement was ‘improve shops / better quality shops’.

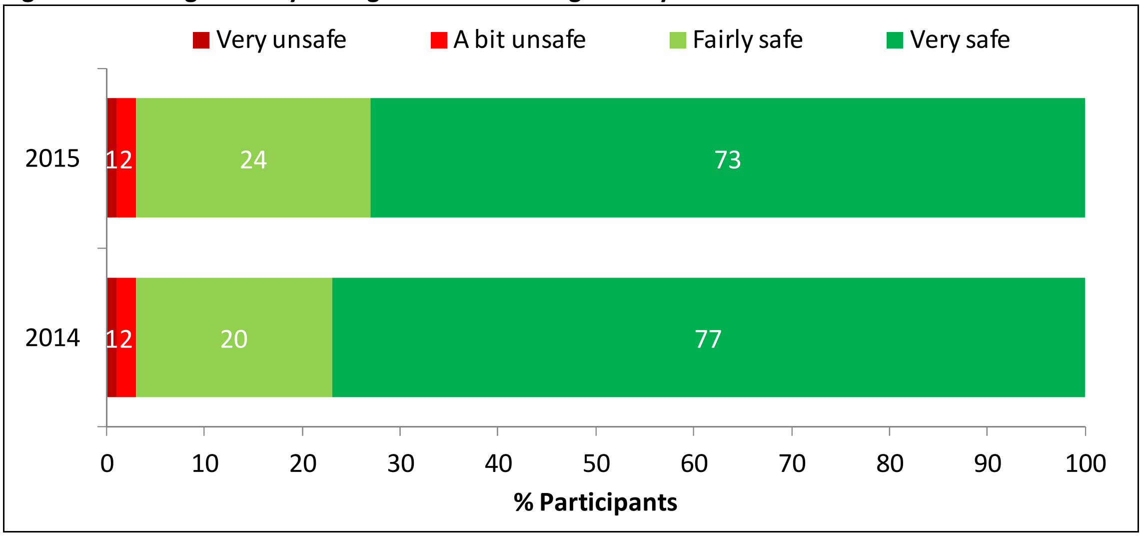
[14] equal with ‘cleaner streets’

The main priorities in each of the town centres are shown in Table 114 in Appendix B.

Safety

The perceived safety of the town centre neighbourhood in day time and at night was explored. Overall in 2105, 73% of town centre visitors felt very safe and 24% felt fairly safe during the day. In 2014, 77% felt very safe and 20% felt fairly safe.

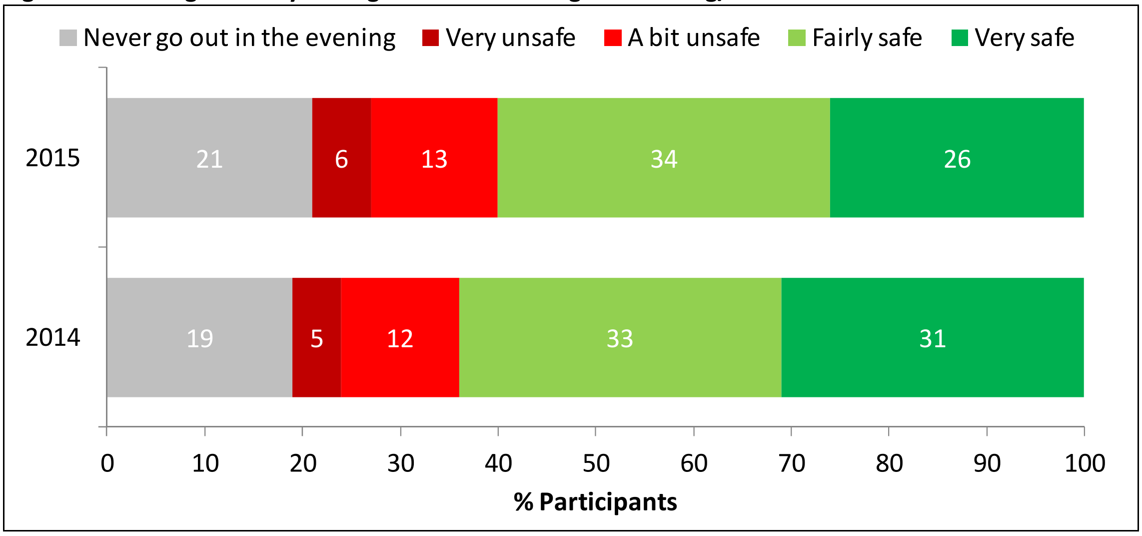
Figure 25: Feeling of safety in neighbourhood during the day: 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536

About a fifth (21% in 2015, 19% in 2014) didn't go out during the evening/after dark in the town centre neighbourhood. The feeling of safety fell markedly with only 26% saying they felt very safe and 34% fairly safe (31% and 33% respectively in 2014).

Figure 26: Feeling of safety in neighbourhood during the evening/after dark: 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536

[15] equal with 'better range of shops'

Visitors to International and Metropolitan town centres felt safer there both in the day time and in evening/after dark than visitors to District town centres.

Table 18: Feeling of safety in neighbourhood in day time and in evening/after dark by London Plan town centre category

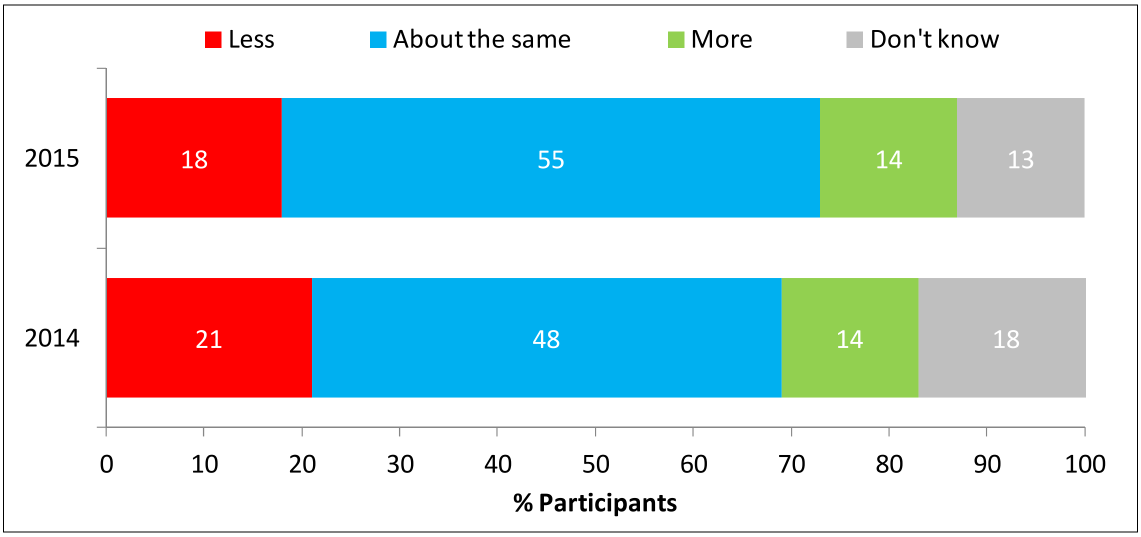
	day time				evening/after dark			
	Inter-national %	Metro-politan %	Major %	District %	Inter-national %	Metro-politan %	Major %	District %
Never go out in the evening					17	21	23	16
Very safe	0	*	1	1	1	4	8	8
Fairly safe	1	1	3	4	5	11	11	26
A bit unsafe	21	21	21	42	37	39	33	29
Very unsafe	78	78	75	53	40	26	25	21
Weighted base	**299**	**1,222**	**2,107**	**596**	**299**	**1,222**	**2,107**	**596**

* = less than 0.5%

The town centres with the highest proportions feeling unsafe in the day time are Lewisham (9% a bit unsafe/very unsafe), Walthamstow (5%), Harlesden (5%) and Hayes (4%). At all other town centres the proportion was 3% or less.

In 2015 a negative balance of 4% of visitors had seen fewer uniformed police officers in the local neighbourhood in the past year: 14% more, 18% less. This is an improvement on the negative balance of 7% in 2014.

Figure 27: Whether seen more or less uniformed police officers in local neighbourhood in past year: 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536

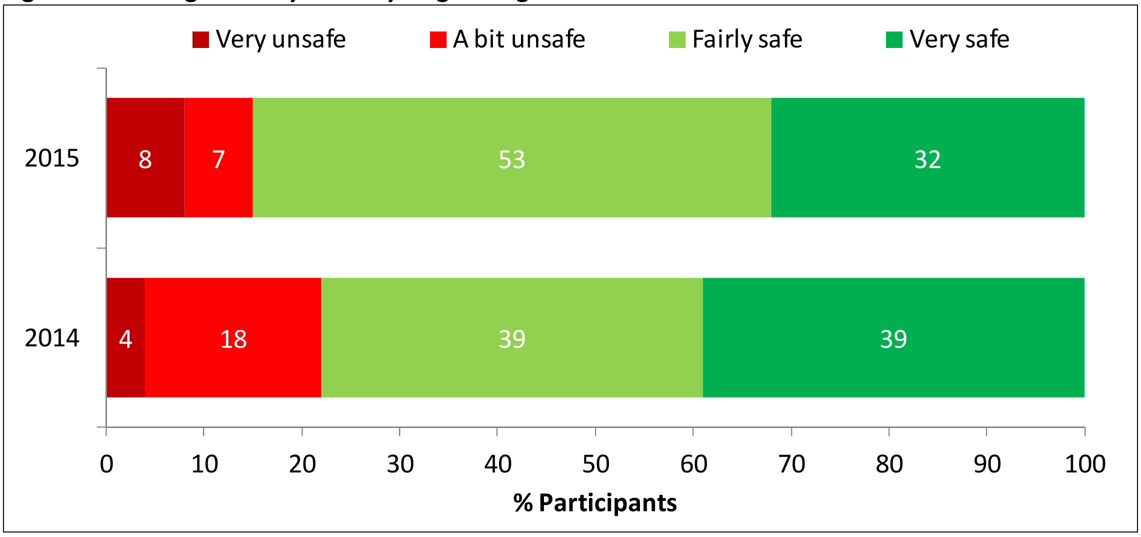
The International town centre had a balance of 5% who had seen **more** uniformed police officers in the local neighbourhood compared to -6% for Metropolitan town centres, -5% for Major town centres and -2% for District town centres.

The town centres with a balance of those who had seen **more** uniformed police officers in the local neighbourhood in the past year were Woolwich (+7%), Oxford Street/Regent Street (+5%) and Wimbledon (+4%).

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 Eltham (-17%), Romford (-10%), Ilford (-10%) and Enfield Town (-10%).

In 2015 85% of cyclists felt very or fairly safe when cycling in the town centre neighbourhood, an increase on the 78% in 2104. However, 8% felt very unsafe, double the proportion in 2014.

Figure 28: Feeling of safety when cycling in neighbourhood: 2015 v 2014



Weighted base: 2015: 149 cyclists; 2014: 222 cyclists

Pedestrian Information Signs

The use and attitudes towards pedestrian information signs were probed. Overall, 11% had used pedestrian information signs in the area on the day of interview (as in 2014) with the proportion highest in Ilford (21%) and lowest in Bromley (5%):

• Ilford	21%
• Hayes	17%
• Oxford Street/Regent Street	16%
• Kingston	15%
• Walthamstow	13%
• Lewisham	11%
• Harlesden	10%
• Stratford	10%
• Wimbledon	10%
• Enfield Town	9%
• Romford	8%
• Eltham	6%
• Woolwich	6%
• Bromley	5%

The signs were perceived as very easy to use with 97% saying they were very easy or easy to use (95% in 2014). The proportion saying they were very easy to use was highest in Enfield Town (82%) and lowest in Kingston (34%).

Almost all who used the signs (89% in 2015, 97% in 2014) said they were helpful.

Urban Realm

Many of the town centres in this study are covered by the major schemes programme. For some these the schemes have finished, for others it has started and for others it is yet to start.

To allow for the impact of the schemes to be measured with respect to changes to the urban realm the survey included a set of ratings questions. These were designed to understand how users of the town centres perceive the town centre with respect to the following:

- attractiveness
- traffic noise
- a relaxing place to be
- ease of crossing the main road
- air quality
- ease of walking around
- graffiti and fly posting
- litter
- pavement condition
- seating areas
- trees and plants
- ease of cycling[16].

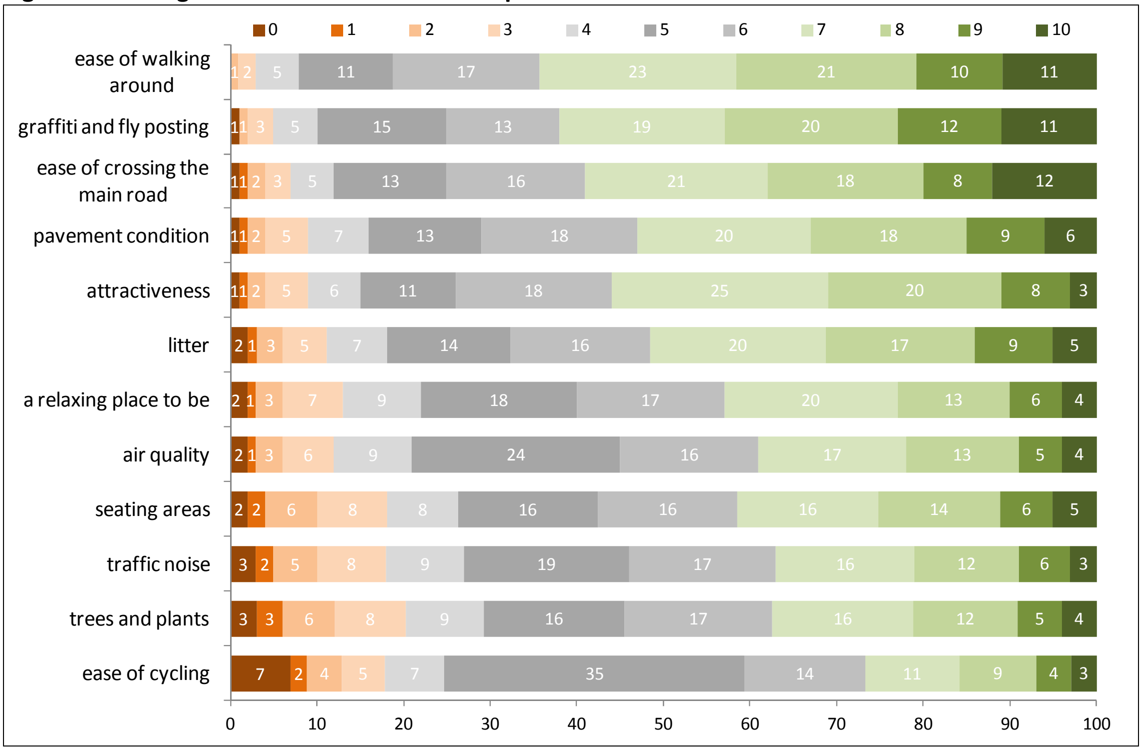
Each of these was rated on a scale from 0 to 10 with the following labels for each end of the scale:

0		**10**
very unattractive	**Attractiveness**	very attractive
very noisy	**Traffic noise**	very quiet
very stressful	**A relaxing place to be**	very relaxing
very difficult	**Ease of crossing the main road**	very easy
very poor	**Air quality**	very good
very difficult	**Ease of walking around**	very easy
significant graffiti/fly posting	**Graffiti and fly posting**	no graffiti/fly posting
significant litter	**Litter**	no litter
cracked and uneven	**Pavement condition**	no cracks and even
no seating areas	**Seating areas**	some seating areas
no trees and plants	**Trees and plants**	some trees and plants
very difficult	**Ease of cycling**	very easy

[16] Added in 2015

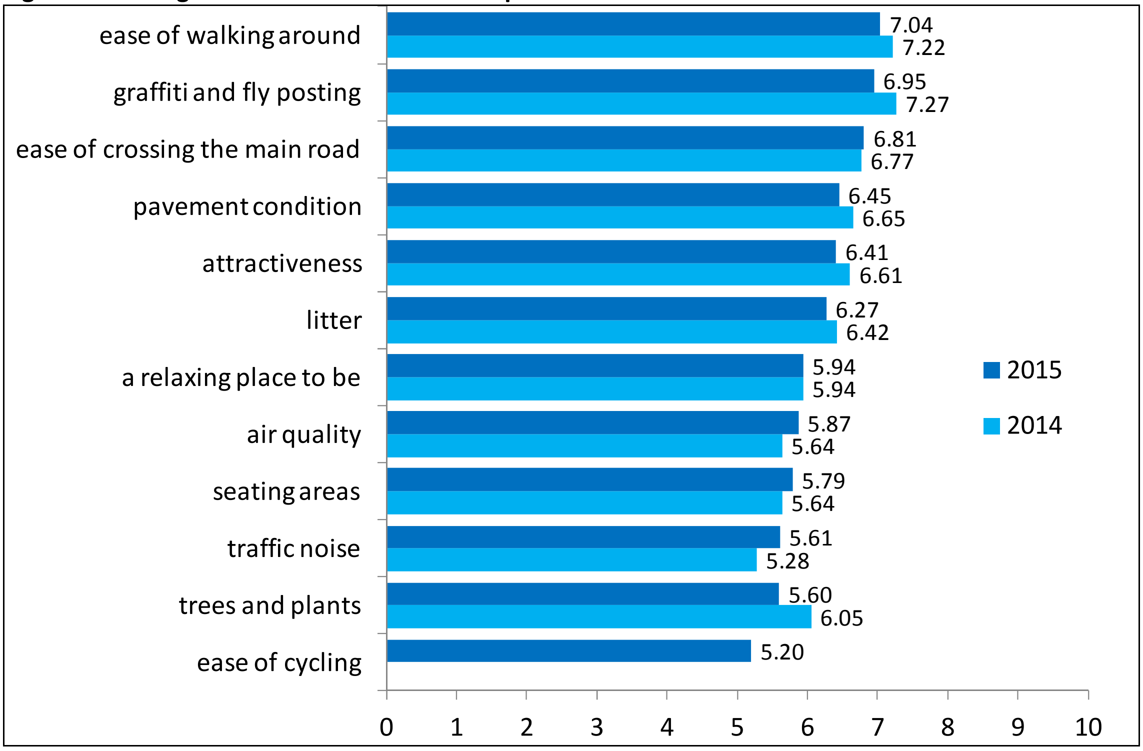
The best rated aspects overall were 'ease of walking around' and 'graffiti and fly posting'. The worst rated aspects were 'ease of cycling', 'trees and plants' and 'traffic noise'. See Figure 29 for the scores for 2105 and Figure 30 for the mean scores for 2015 v 2014.

Figure 29: Ratings of different urban realm aspects 2015



Weighted base: all respondents 4,224

Figure 30: Ratings of different urban realm aspects – mean scores: 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536

Analysis by London Plan town centre category shows similar top ratings for all categories of town centre except International. At the international town centre (Oxford Street/Regent Street) 'attractiveness' gained the highest score, followed by 'graffiti and fly posting' and 'pavement condition'. It scored worst for 'traffic noise' and 'ease of cycling'

Metropolitan and Major town centres had very similar priorities although the Metropolitan ratings were higher.

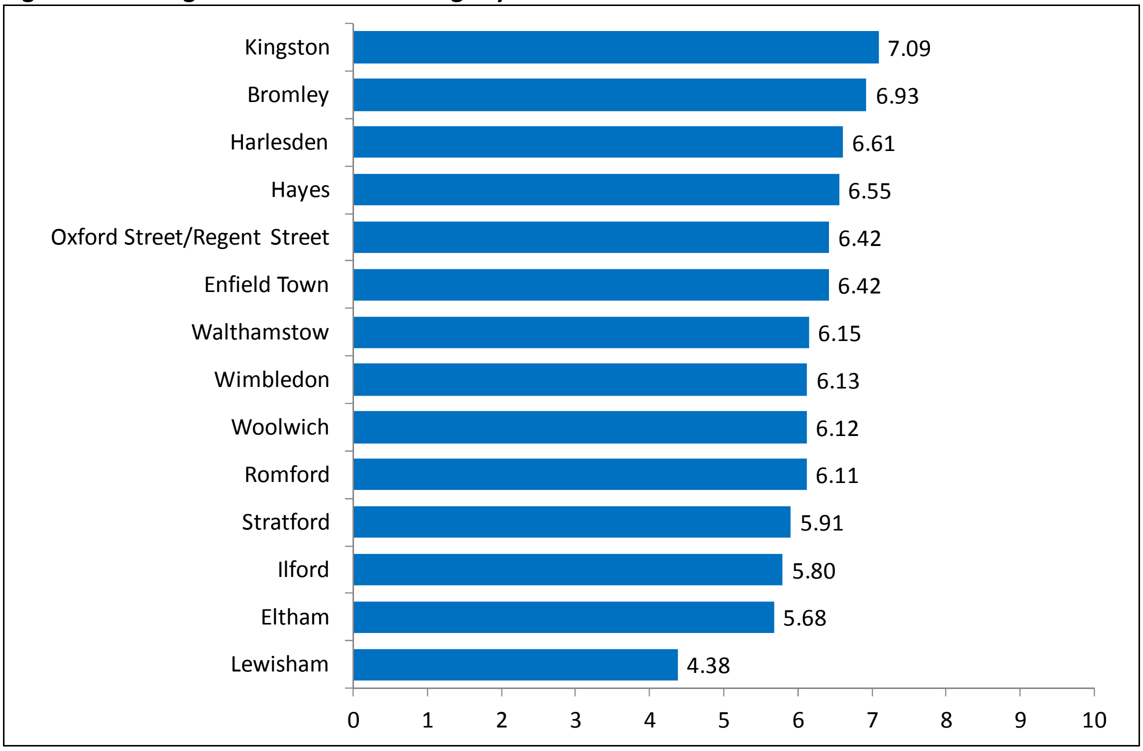
District centre participants have the highest mean scores for the seven lowest rated aspects (compared to the other town centre categories) but worst for 'graffiti and fly posting'.

Figure 31: Ratings of different urban realm aspects – mean scores by London Plan town centre category

	International	Metropolitan	Major	District
Ease of walking around	7.0	7.3	6.9	7.0
Graffiti and fly posting	7.3	7.2	6.8	6.7
Ease of crossing the main road	6.8	7.1	6.7	6.8
Pavement condition	7.2	6.7	6.1	6.7
Attractiveness	7.5	6.7	6.0	6.7
Litter	6.4	6.7	6.0	6.3
A relaxing place to be	6.2	6.3	5.6	6.5
Air quality	6.0	6.2	5.5	6.6
Seating areas	6.2	6.4	5.1	6.6
Traffic noise	5.4	6.0	5.2	6.4
Trees and plants	5.7	5.9	5.2	6.3
Ease of cycling	5.5	5.5	4.7	6.4
Weighted base	**299**	**1,222**	**2,107**	**596**

The mean scores for all 12 aspects for each of the 14 town centres covered in 2015 are shown in Table 113 in Appendix B. The average ratings of the mean scores for the 14 town centres show that, overall, Kingston has the best rating on the aspects followed by Bromley, Harlesden, Hayes and Oxford Street/Regent Street. The three lowest rated town centres are Lewisham, Eltham and Ilford (see Figure 32).

Figure 32: Average mean scores for ratings by town centre 2015



Weighted base: all respondents 4,224

Awareness and impact of improvements

In the 2015 survey a set of questions was added on whether participants had noticed improvements in the past year to:

- pedestrian facilities in the town centre area
- cyclist facilities in the town centre area
- the urban realm/landscape in the town

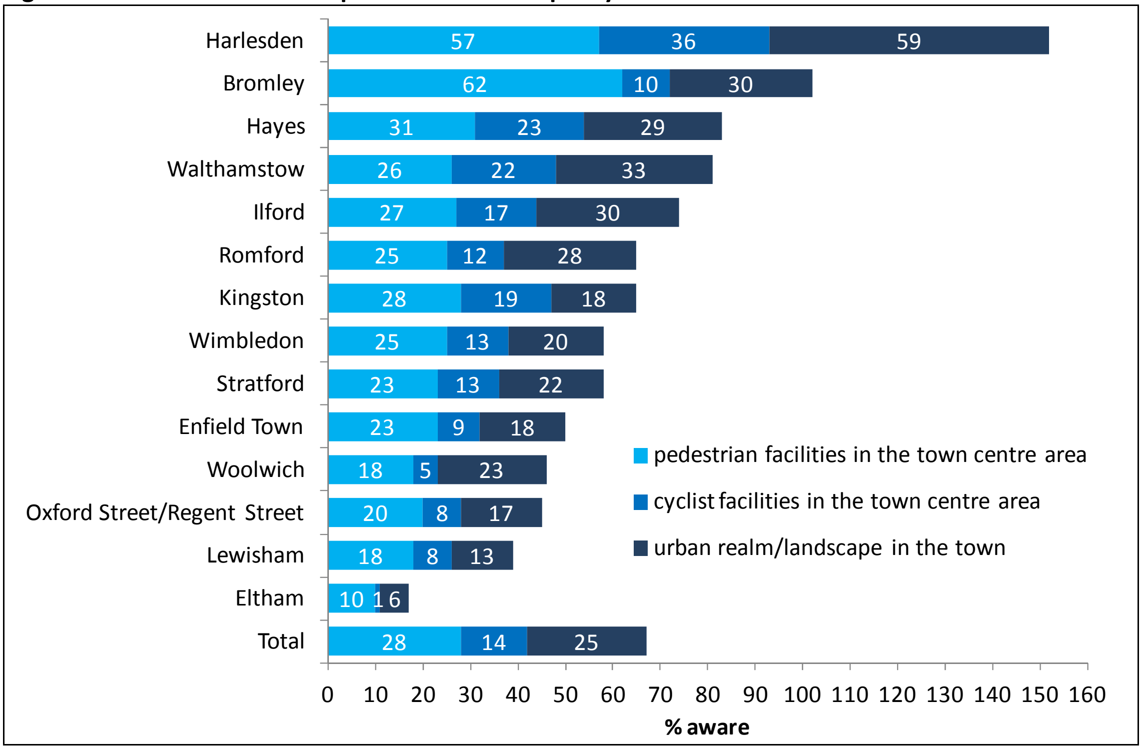
Overall, 28% had noticed improvements to pedestrian facilities, 14% to cycle facilities and 25% to the urban realm/landscape. See Figure 33.

Improvements to pedestrian facilities were most noted in Bromley (62% of visitors there) and Harlesden (57%).

Improvements to cyclist facilities were most noted in Harlesden (36%), Hayes (23%) and Walthamstow (57%).

Urban realm/landscape improvements were most noted in Harlesden (59%), Walthamstow (33%), Bromley (30%) and Ilford (30%).

Figure 33: Whether noticed improvements in the past year to….

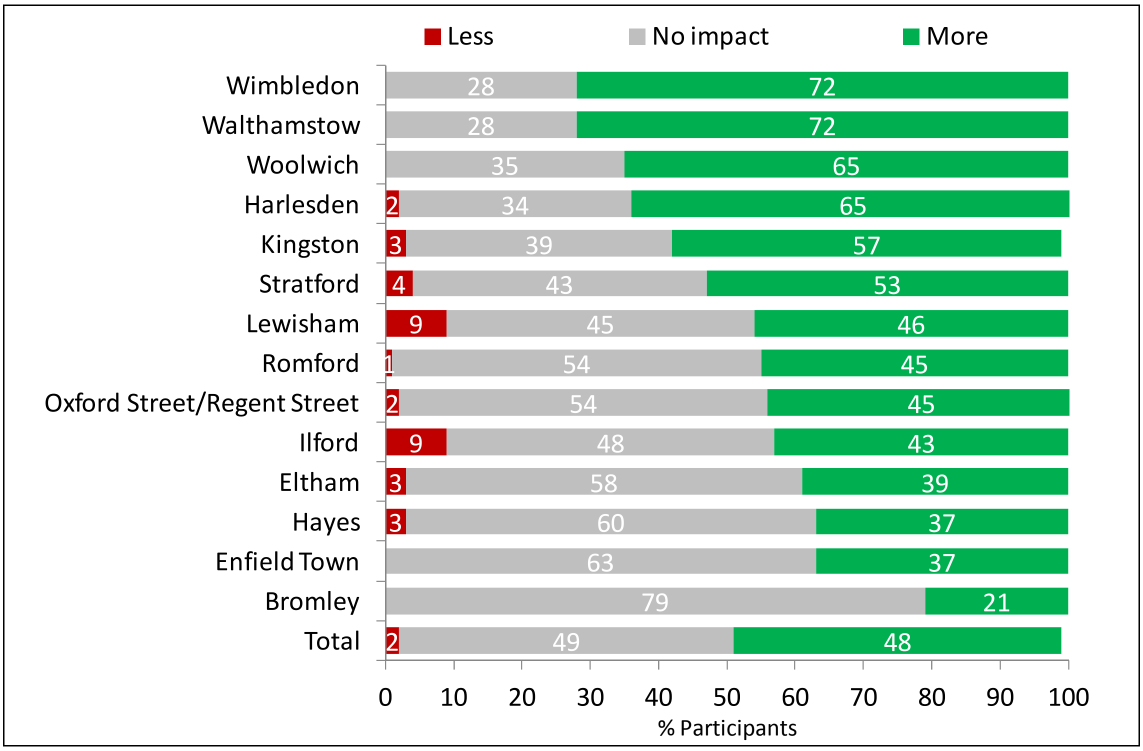


Weighted base: Total, 4,222; Bromley 302, Eltham 304, Enfield Town 316, Hayes 302, Harlesden 294, Ilford 298, Kingston 317, Lewisham 311, Oxford Street/Regent Street 299, Romford 304, Stratford 297, Walthamstow 295, Wimbledon 295, Woolwich 289

Those who had noticed improvements were asked if these improvements had encouraged them to walk (if pedestrian improvements), cycle (if cyclist improvements) or visit and walk (if urban realm/landscape improvements).

For those who had noticed improvements in the past year to the pedestrian facilities in the town centre area, almost half (48%) said the walked more in the area as a result. The town centres with the highest proportions saying they walked more were Wimbledon (72%), Walthamstow (72%), Woolwich (65%) and Harlesden (65%).

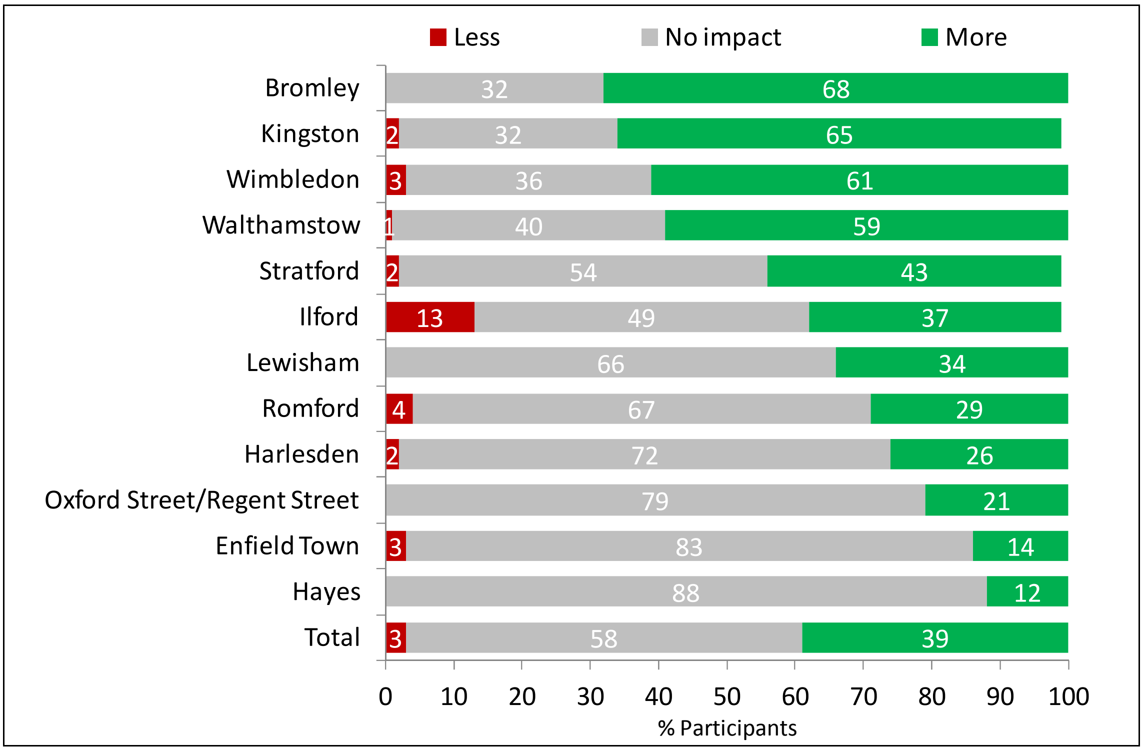
Figure 34: Whether improvements to pedestrian facilities encouraged them to walk in the area more or less than before



Weighted base: Those who had noticed improvements to pedestrian facilities: Total 1175, Bromley 186, Enfield Town 72, Hayes 92, Eltham 29, Ilford 80, Oxford Street/Regent Street 59, Romford 76, Lewisham 55, Stratford 68, Kingston 89, Harlesden 167, Woolwich 52, Walthamstow 76, Wimbledon 74

For those who had noticed improvements in the past year to the cyclist facilities in the town centre area, 39% said the cycled more in the area as a result. The town centres with the highest proportions saying they cycled more were Bromley (68%), Kingston (65%), Wimbledon (61%) and Walthamstow (59%).

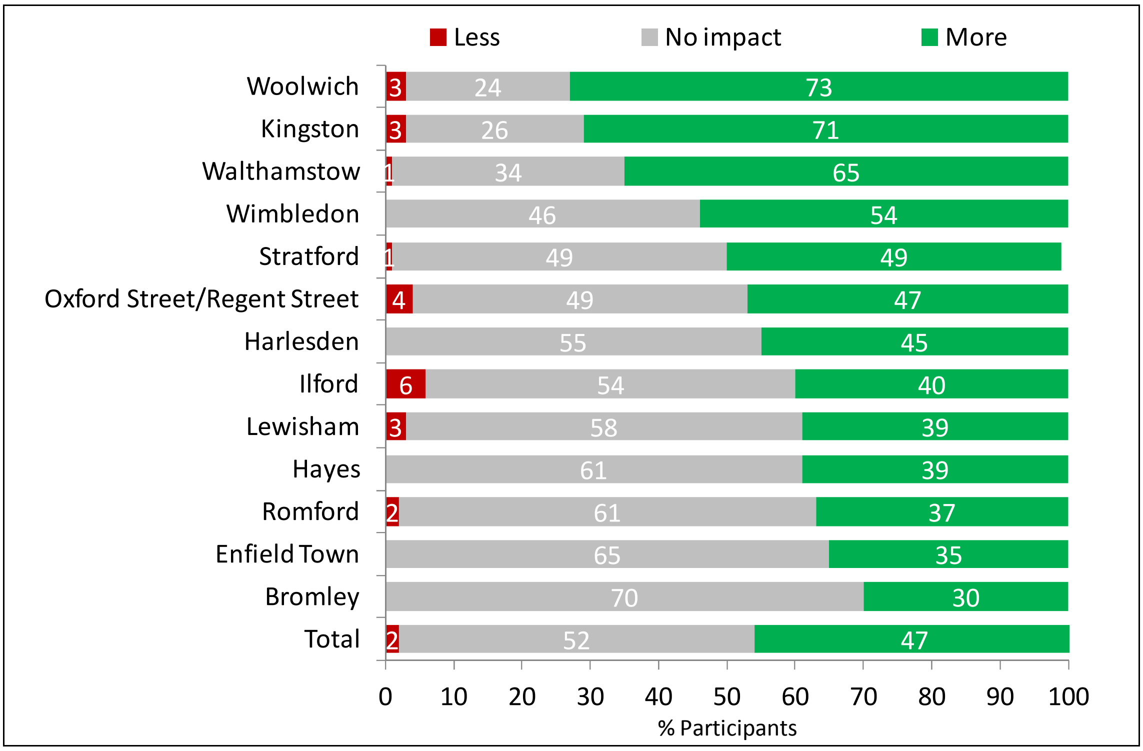
Figure 35: Whether improvements to cyclist facilities encouraged them to cycle in the area more or less than before



Weighted base: Those who had noticed improvements to pedestrian facilities: Total 584, Hayes 68, Enfield Town 30, Oxford Street/Regent Street 23, Harlesden 105, Romford 35, Lewisham 25, Ilford 50, Stratford 38, Walthamstow 66, Wimbledon 37, Kingston 60, Bromley 31.
Note: excludes Eltham and Woolwich as only 1% and 5% respectively said they noticed changes

For those who had noticed improvements in the past year to the urban realm/landscape in the town centre area, 47% said they visited the area more as a result. The town centres with the highest proportions saying they visited more were Woolwich (73%), Kingston (71%) and Walthamstow (65%).

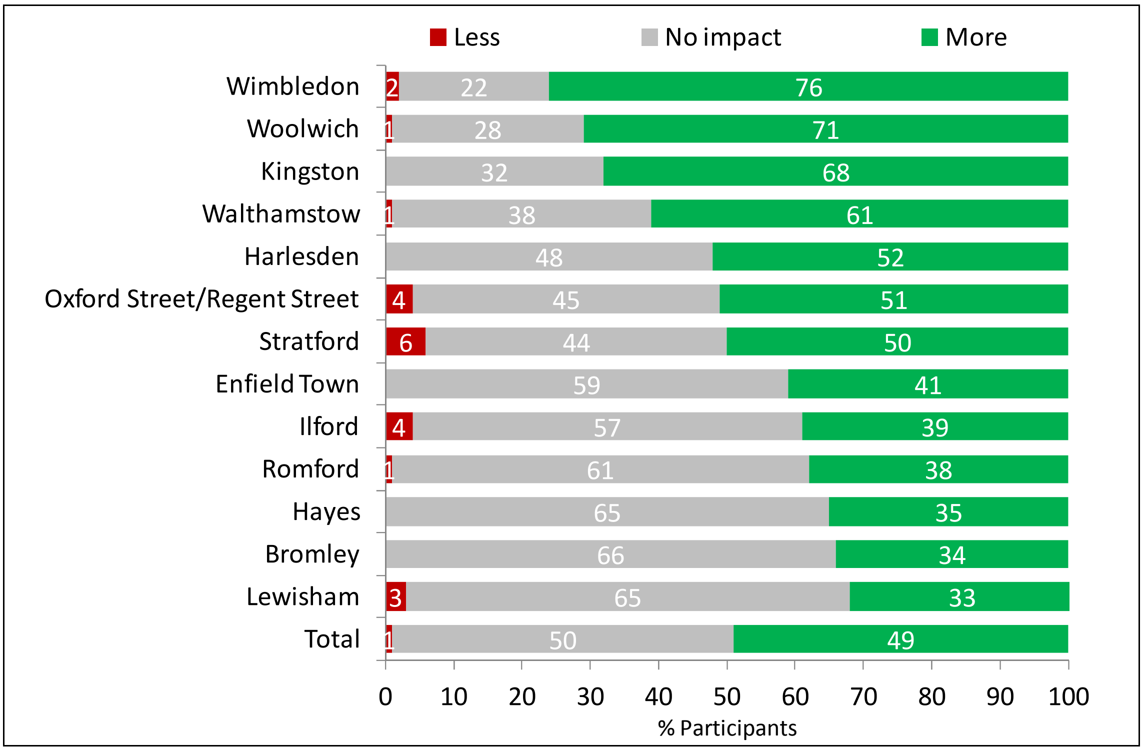
Figure 36: Whether urban realm/landscape improvements encouraged them to visit the area more or less than before



Weighted base: Those who had noticed improvements to the urban realm/landscape: Total 1042, Lewisham 42, Bromley 92, Hayes 89, Romford 84, Ilford 89, Enfield Town 58, Stratford 66, Oxford Street/Regent Street 52, Harlesden 173, Walthamstow 97, Kingston 57, Woolwich 66, Wimbledon 60
Note: excludes Eltham as only 6% said they noticed changes

A similar proportion of this sample (49%) said they walked in the area more as a result. The town centres with the highest proportions saying they walked in the area more were Wimbledon (76%), Woolwich (71%) and Kingston (68%).

Figure 37: Whether urban realm/landscape improvements encouraged them to walk in the area more or less than before



Weighted base: Those who had noticed improvements to the urban realm/landscape: Total 1042, Lewisham 42, Bromley 92, Hayes 89, Romford 84, Ilford 89, Enfield Town 58, Stratford 66, Oxford Street/Regent Street 52, Harlesden 173, Walthamstow 97, Kingston 57, Woolwich 66, Wimbledon 60

Note: excludes Eltham as only 6% said they noticed changes

3.9 Use of Other Shopping Centres

Summary

63% of town centre visitors go to other shopping centres in and around London. The most visited shopping centres were Westfield Stratford (38%), Bluewater (22%) and Westfield White City (21%).

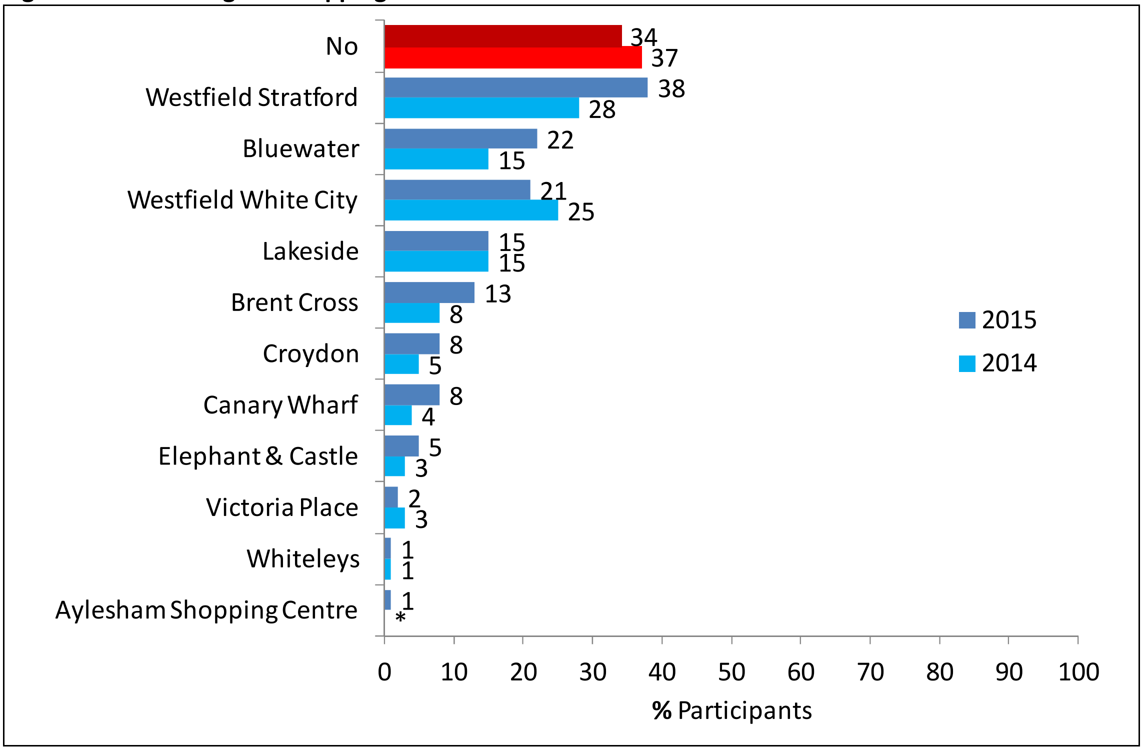
Respondents who accessed the town centre by car and train/Tube were most likely to visit other shopping centres and those who used cycle were least likely.

Nearly two thirds of town centre visitors (63%) go to other shopping centres in and around London (a slight fall from the 66% in 2014).

The most visited other shopping centres[17] were Westfield Stratford (38% in 2015, 28% in 2014), Bluewater (22% and 15% respectively) and Westfield White City (21% and 25% respectively). The increase in Bluewater and decrease in Westfield White City is largely because of the locations of the centres between waves with around half the visitors at Bromley, Eltham and Woolwich visiting Bluewater.

[17] From a list shown to respondents

Figure 38: Whether go to shopping centres in and around London: 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536

Visitors to District town centres were most likely to visit Brent Cross (42% compared to 7-9% for other categories of town centre) and least likely to visit Westfield Stratford (12% compared to 33-45% for other categories of town centre).

Visitors to Metropolitan and Major town centres were most likely to visit Westfield Stratford. Visitors to the International town centre were most likely to visit Westfield White City.

A quarter of visitors to Metropolitan town centres visit Lakeside compared to between 2% and 14% for other categories of town centre.

Table 19: Whether go to shopping centres in and around London by London Plan town centre category

	International %	Metropolitan %	Major %	District %
No	43	30	33	37
Westfield Stratford	33	41	45	12
Bluewater	13	27	26	4
Westfield White City	42	18	16	37
Lakeside	8	25	14	2
Brent Cross	9	7	9	42
Canary Wharf	5	8	9	3
Croydon	3	11	9	3
Elephant & Castle	3	5	6	4
Victoria Place	3	3	2	2
Aylesham Shopping Centre	*	*	2	1
Whiteleys	1	*	1	1
Weighted base	**299**	**1,222**	**2,107**	**596**

* = less than 0.5%

Participants who accessed the town centre by car and train/Tube were most likely to visit other shopping centres and those who used cycle least likely:

	Visit other shopping centres
• Car	73%
• Train/Tube	72%
• Bus	64%
• Walk	64%
• Bicycle	48%.

As mentioned earlier the specific other shopping centres visited were very much a function of the location of the town centre. For example:

- 79% at Stratford, 75% at Ilford, 65% at Walthamstow and 62% at Romford visit Westfield Stratford compared to between 10% and 45% elsewhere
- 58% at Romford and 32% at Ilford visit Lakeside compared to between 2% and 20% elsewhere
- 56% at Harlesden, 33% at Enfield Town and 29% at Hayes visit Brent Cross compared to up to 15% elsewhere
- 55% at Eltham, 47% at Bromley and 44% at Woolwich visit Bluewater compared to between 3% and 39% elsewhere
- 42% at Oxford Street/Regent Street and 40% at Harlesden visit Westfield White City compared to between 4% and 25% elsewhere.

3.10 Oxford Street/Regent Street

Summary

Oxford Street is visited because of its shopping facilities: 45% considered it to be the best shopping area, 20% were visiting a particular shop and 14% cited 'more/better/ bigger range of shops'.

34% of visitors to Oxford Street/Regent Street were aware of the changes to travel around Tottenham Court Road.

Of those who were aware 49% knew it was because of building rail/Crossrail station.

41% 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.

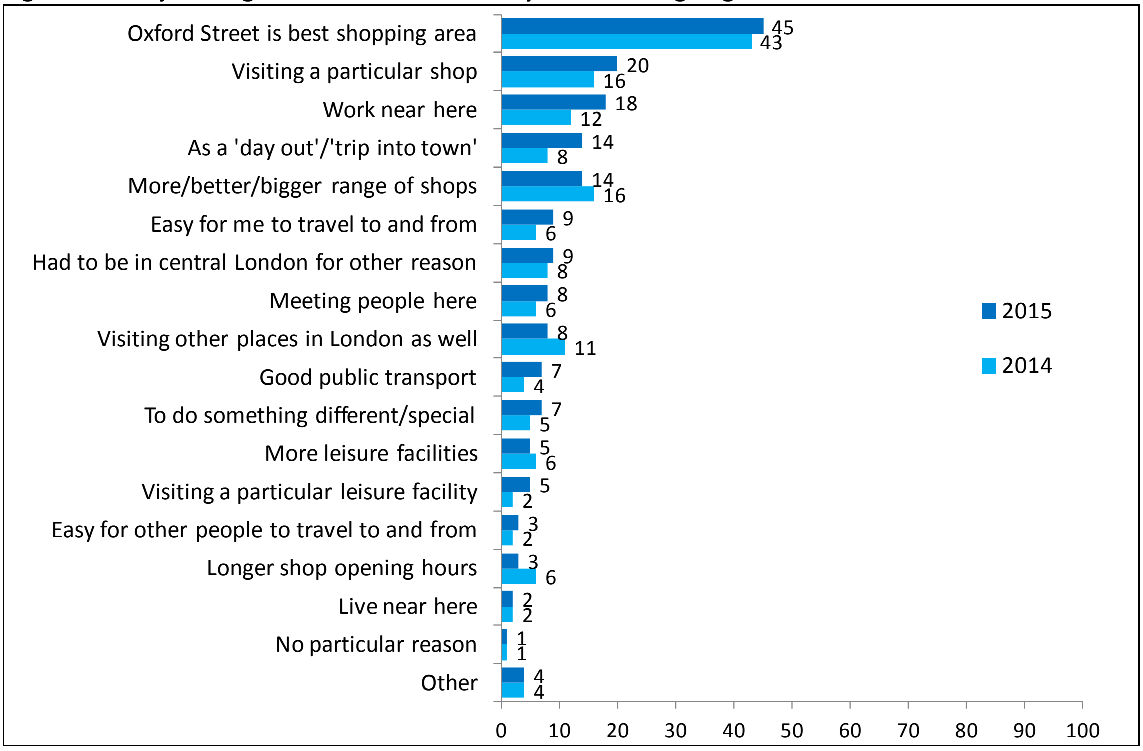
There were specific questions asked for respondents at Oxford Street/Regent Street covering possible disruption because of Crossrail works, the diagonal crossing at Oxford Circus and why they visit the area.

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: in 2015 it was considered to be the best shopping area by 45% (42% in 2014), 20% were visiting a particular shop (16% in 2014) and 14% cited 'more/better/bigger range of shops' (16% in 2014).

The main non shopping reasons mentioned were working near Oxford Street (18% in 2015 and 12% in 2014) and visiting other places in London as well (8% in 2015 and 11% in 2014).

Figure 39: Why visiting Oxford Street area today rather than going somewhere else



Base: visitors to Oxford Street/Regent Street: 299 in 2015, 293 in 2014

Awareness of changes to travel around Tottenham Court Road

Visitors to Oxford Street/Regent Street were asked "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".

A third of visitors (34% in 2015 and 33% in 2014) were aware of the changes to travel around Tottenham Court Road. This is more than the 29% in 2013 but 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: 59% compared to 27% (60% compared to 27% in 2014).

Awareness for reasons for diversions and travel changes

Of those who were aware of the changes to travel around Tottenham Court Road, 49% in both years knew it was because of building rail/Crossrail station (17% of all visitors to Oxford Street).

Other reasons mentioned included:

	2015	2014
• Improving Underground station	32%	9%
• Transport works (unspecified)	18%	14%
• Building works (unspecified)	17%	17%
• Improving bus facilities/bus routes	9%	1%
• Utility works (eg electricity, gas, water)	5%	5%
• Improving road layout/better roads	6%	3%
• Improving cycle facilities	3%	1%
• Improving pavements/pedestrian facilities	7%	0%
• New shops/shopping centre development	0%	1%

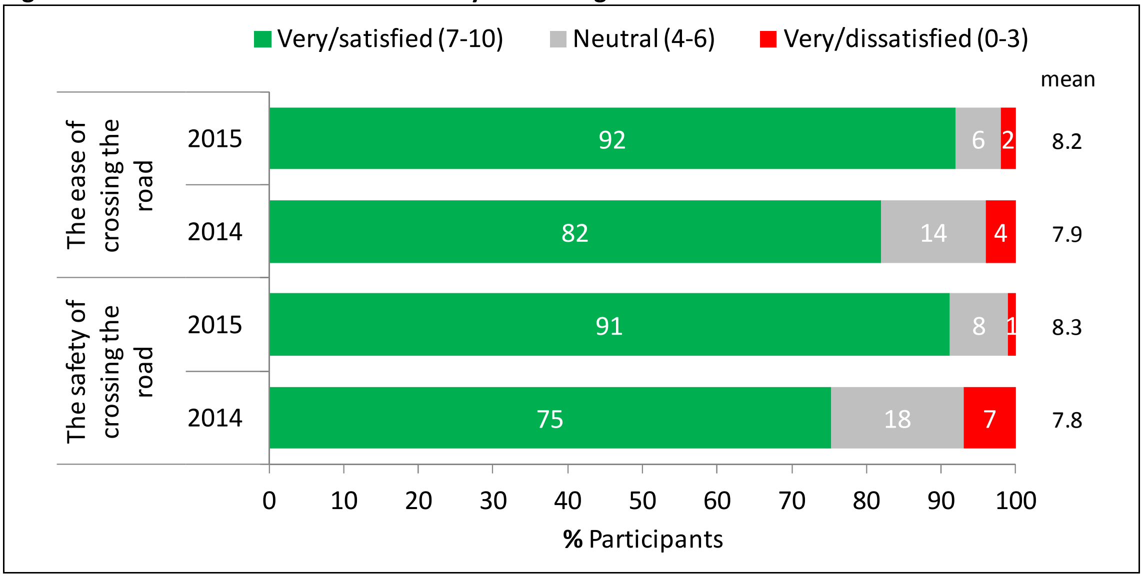
Three per cent said they didn't know (11% in 2014).

Diagonal Crossing

Forty one per cent of visitors to Oxford Street/Regent Street had used the diagonal crossing at Oxford Circus, a fall from the 50% in 2014.

For those who had used it there were very high levels of satisfaction with both the safety and ease of crossing the road on the diagonal crossing and these had improved since 2014.

Figure 40: Satisfaction with ease and safety of crossing



Base: visitors to Oxford Street/Regent Street who used diagonal crossing: 123 in 2015, 146 in 2014
Mean scores based on 0 = very dissatisfied and 10 = very satisfied

Respondents aged 45-60 and females gave the highest satisfaction scores:

	16-24	25-44	45-60	60+	Male	Female
• ease of crossing the road	8.1	8.1	8.4	8.3	7.9	8.4
• safety of crossing the road	8.1	8.2	8.6	8.3	8.0	8.5
Base	23	58	30	11	50	73

3.11 Shopping and Expenditure in the Area

Summary

Almost half (49%) were shopping for groceries and food, 34% were shopping for clothes or footwear, 27% were eating out and 10% were using a service.

Food/grocery shopping was most mentioned at District and Major town centres (66% and 57%) and least mentioned at International town centres (11%).

Clothing or footwear shopping was most mentioned at International town centres (68%) and least mentioned at District town centres (16%).

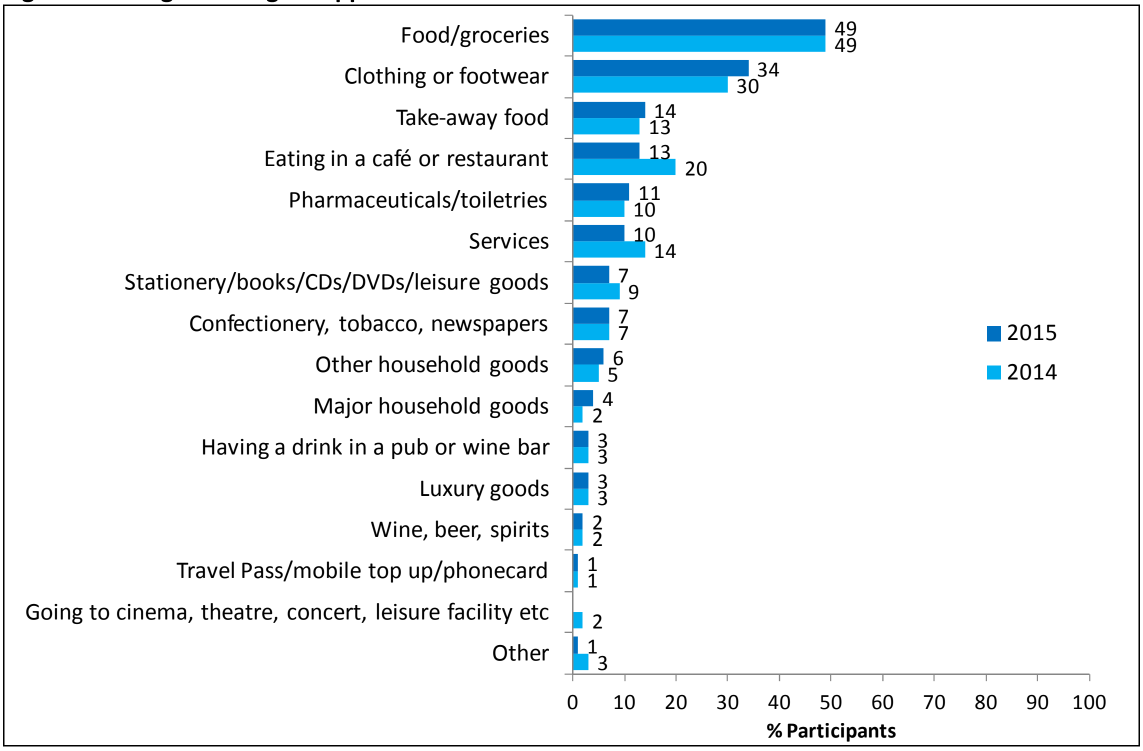
A wide range of services and shops were visited by respondents. Almost half of the visitors to the town centres were shopping for groceries and food (49% in both 2015 and 2014) and 34% (30% in 2014) were shopping for clothes or footwear as shown in Figure 41.

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:

- Take away food 14%
- Café or restaurant 13%
- Pharmaceuticals/toiletries 11%
- Services (eg hairdressers) 10%.

Figure 41: Range of things shopped for and services used



Weighted base: all respondents: 2015: 4,224; 2014: 3,536

Analysis by town centre categories used in the London Plan is shown in Table 20. This shows that in 2015 food/grocery shopping was most mentioned at District and Major town centres (66% and 57%) and least mentioned at International town centres (11%).

Clothing or footwear shopping was most mentioned at International town centres (68%) and least mentioned at District town centres (16%).

Table 20: Range of shopping and services by London Plan town centre category: 2015 v 2014

	International		Metropolitan		Major		District	
	2015 %	**2014 %**	**2015 %**	**2014 %**	**2015 %**	**2014 %**	**2015 %**	**2014 %**
Food/groceries	11	10	36	42	57	57	66	57
Clothing or footwear	68	74	43	38	29	26	16	8
Take-away food	17	12	16	16	12	12	19	12
Eating in a café or restaurant	23	20	13	22	13	19	11	19
Pharmaceuticals/toiletries	11	6	10	12	11	11	16	7
Services	1	9	10	14	11	13	11	21
Confectionery, tobacco, newspapers	6	4	6	9	5	7	15	6
Stationery/books/CDs/DVDs/leisure goods	5	8	8	12	7	9	5	4
Other household goods	5	4	7	6	6	6	4	2
Major household goods	5	1	5	3	3	2	4	1
Luxury goods	7	8	3	3	2	2	2	2
Having a drink in a pub or wine bar	4	4	3	3	3	2	4	3
Wine, beer, spirits	1	1	2	3	1	2	6	1
Going to cinema, concert etc	1	4	3	2	2	2	1	2
Travel Pass/mobile top up/phonecard	1	1	*	1	2	1	3	1
Other	*	2	1	3	2	4	1	1
Weighted base	**297**	**286**	**1,222**	**892**	**2,107**	**1,761**	**596**	**589**

‘Food/grocery shopping’ was most mentioned at eleven of the fourteen town centres. At Oxford Street/Regent Street, Kingston and Bromley ‘clothing or footwear’ was mentioned most (68%, 53% and 46% respectively).

‘Clothing or footwear’ was the second most mentioned at Eltham, Enfield Town, Hayes, Ilford, Lewisham, Romford, Stratford, Walthamstow and Woolwich.

‘Take away food’ was second most mentioned at Wimbledon and Harlesden.

‘Eating in a café or restaurant’ was second most mentioned at Oxford Street/Regent Street and ‘food/groceries’ was second most mentioned at Bromley.

3.12 Average Spend

Summary

The average spend was £39 on the day of interview which is slightly more than the usual spend per visit: £34. The average spend per week was £73. The average spend per month was £293.

Average spend per visit by mode was car £47, train/Tube £47, bus £30, walk £25 and cycle £25.

Average spend per week by mode was walk £92, bus £71, car £71, cycle £65 and train/Tube £50.

Average spend per month by mode was walk £370, bus £284, car £283, cycle £259 and train/Tube £201.

Visitors were asked how much they anticipated spending in the town 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 town 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, mid point values were applied to the bands. Full details of these values are provided in Appendix C.

Overall the average spend was £39 on the day of interview in 2015 (£36 in 2014) which is a little higher than the usual spend per visit (£34). The average spend per week was £73 (£72 in 2014) and the average spend per month was £293 (£288 in 2014).

Table 21: Average spend: 2015 v 2014

	Spend today		Average spend per visit		Average total spend per week*		Average total spend per month*	
	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %
Nothing	3	4	1	2	1	1	1	1
Under £5	7	10	6	7	5	7	1	1
£5-£19.99	32	35	34	40	16	18	3	4
£20-£49.99	32	30	35	32	26	27	7	8
£50-£99.99	18	14	14	14	27	23	12	12
£100+	7	7	6	5	20	18	71	67
Mean	**£39**	**£36**	**£34**	**£33**	**£73**	**£72**	**£293**	**£288**
Base	**4,159**	**3,442**	**4,034**	**3,328**	**4,033**	**3,326**	**4,033**	**3,326**

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

Oxford Street/Regent Street (£79), Kingston (£53) and Bromley (£50) were the town centres with the highest levels of spend on the day of interview. All three also had the highest levels of spend on average.

Visitors to Harlesden (£26) and Hayes (£28) spent the least.

Those visiting Walthamstow spend the most on average per week and month (£86 and £344 respectively), with those visiting Kingston (£82 and £330), Hayes (£81 and £325) and Woolwich (£80 and £319) also having high average weekly and monthly spends. Those visiting Oxford Street/Regent Street (£55 and £222) and Enfield Town (£61 and £243) spent least on average.

Those in Oxford Street/Regent Street tend not to be such regular visitors to the area and so, despite the high spend per visit, has a relatively low average spend per week and month. This would indicate that places such as Barking 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 105, Table 107, Table 109 and Table 111.

Spend by Mode

Those who travelled by car were also high spenders on the day of the interview (45% spent £50 or more). In comparison, only 17% of those who travelled by bus, 15% pf those who cycled and 16% 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 (£56, a large increase on the £47 in 2014) but those who travelled by train/Tube were also high spenders (£51 on average). Those who cycled and walked to the centre spent the least (£27 and £29 respectively). These figures are shown in Table 22.

Table 22: Average spend by mode on day 2015

	Car %	Bus %	Train/Tube %	Bicycle %	Walked %	Taxi/ minicab/ other %
Nothing	3	2	2	7	3	2
Under £5	3	8	10	7	8	4
£5-£19.99	18	34	24	42	40	27
£20-£49.99	29	37	25	27	33	23
£50-£99.99	30	12	24	14	12	16
£100+	15	5	13	1	4	15
Mean	**£56**	**£33**	**£51**	**£27**	**£29**	**£55**
Mean 2014	*£47*	*£31*	*£45*	*£30*	*£29*	*£35*
Base[18]	**730**	**1,472**	**725**	**68**	**1,125**	**40**

A similar pattern was found in the average spend per visit, with 34% 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 and train/Tube passengers spent £47, bus customers £30, those who walked and cycled £25.

Table 23: Average spend by mode per visit 2015

	Car %	Bus %	Train/Tube %	Bicycle %	Walked %	Taxi/ minicab/ other %
Nothing	2	1	2	1	1	2
Under £5	2	6	8	7	6	2
£5-£19.99	20	39	26	42	44	16
£20-£49.99	35	36	25	35	36	29
£50-£99.99	25	11	19	8	8	22
£100+	9	2	11	1	1	17
Mean	**£47**	**£30**	**£47**	**£25**	**£25**	**£62**
Mean 2014	*£43*	*£29*	*£41*	*£26*	*£26*	*£32*
Base[18]	**688**	**1,452**	**680**	**66**	**1,109**	**40**

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 24) shows that those who walk to the area tend to spend most on average per week (£92 on average). Those travelling by car and bus spend the next most per week on average (£71) whereas those travelling to the area by train/Tube spend the least (£50).

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.

[18] except refused and don't know

Table 24: Average total spend per week by mode 2015

	Car %	Bus %	Train/Tube %	Bicycle %	Walked %	Taxi/ minicab/ other %
Nothing	2	1	2	1	1	2
Under £5	7	5	11	6	2	2
£5-£19.99	12	17	23	19	10	22
£20-£49.99	29	28	28	25	23	14
£50-£99.99	25	27	17	30	33	24
£100+	18	18	11	15	29	24
Mean	£71	£71	£50	£65	£92	£83
Mean	*£65*	*£67*	*£57*	*£75*	*£93*	*£60*
Base[18]	688	1,451	680	66	1,109	40

Table 25: Average total spend per month by mode 2015

	Car %	Bus %	Train/Tube %	Bicycle %	Walked %	Taxi/ minicab/ other %
Nothing	2	1	2	1	1	2
Under £5	1	1	4	2	0	2
£5-£19.99	4	3	6	3	1	2
£20-£49.99	6	7	13	8	3	11
£50-£99.99	11	12	16	13	8	11
£100+	68	72	52	69	84	60
Mean	£283	£284	£201	£259	£370	£332
Mean	*£261*	*£267*	*£227*	*£300*	*£371*	*£239*
Base[18]	688	1,451	680	66	1,109	40

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, 29% of those who travelled by car also use the bus), but this calculation is based on the mode used on the day of interview.

Comparison over time

There has been an increase in weekly and monthly spend by bus users since 2004. For walk and train/Tube there has not been much change since 2004. Car has increased and cycle is back at the level it was in 2009.

weekly	**2015**	**2014**	**2013**	**2011**	**2009**	**2004**
Total	**£73**	**£72**	**£69**	**£72**	**£69**	**£69**
Bus	£71	£67	£73	£70	£66	£63
Walk	£92	£93	£86	£93	£89	£91
Car	£71	£65	£62	£56	£61	£64
Train/Tube	£50	£57	£48	£59	£50	£46
Bicycle	£65	£75	£48	£47	£64	-

monthly	**2015**	**2014**	**2013**	**2011**	**2009**	**2004**
Total	**£293**	**£288**	**£277**	**£290**	**£276**	**£276**
Bus	£284	£267	£292	£282	£265	£252
Walk	£370	£371	£346	£373	£360	£364
Car	£283	£261	£247	£226	£243	£256
Train/Tube	£201	£227	£192	£239	£201	£184

Bicycle	£259	£300	£190	£188	£258	-

Spend by London Plan Town Centre Category

Analysis by town centre categories used in the London Plan is shown in Table 26. Those who visit International town centres spend the most on the day of visit: almost three times the amount spent at District town centres and more than twice the amount spent at Major town centres.

However, the average spend per week and month is more similar across town centre categories (between £55 and £76 per week and between £222 and £302 per month) as those in District, Metropolitan and Major town centres visit more often than those at International town centres.

Table 26: Average spend today, per visit, per week and per month by London Plan town centre category

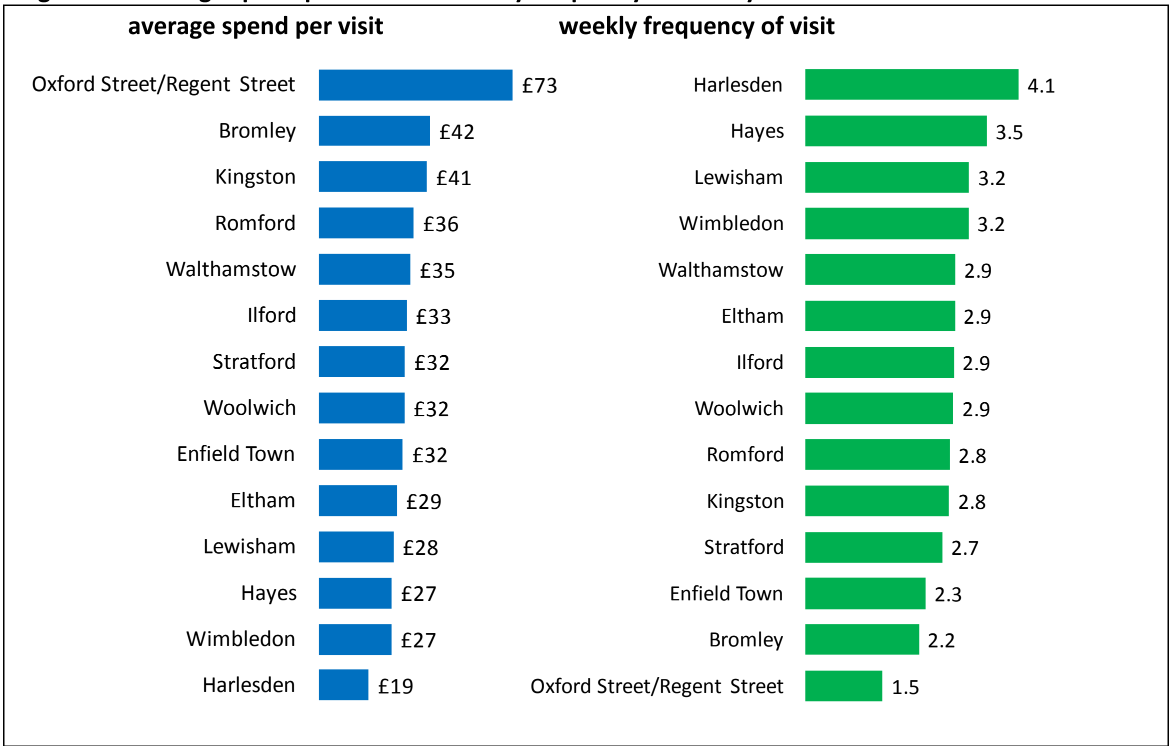
Spend today	International %	Metropolitan %	Major %	District %
Nothing	2	2	4	2
Under £5	7	7	7	6
£5 - £19.99	17	25	32	49
£20 - £49.99	16	31	35	31
£50 - £99.99	25	24	16	7
£100+	31	8	5	4
Mean	**£79**	**£44**	**£34**	**£27**
Mean 2014	*£77*	*£36*	*£34*	*£21*
Spend per visit				
Nothing	2	1	2	2
Under £5	7	5	5	7
£5 - £19.99	16	29	35	55
£20 - £49.99	15	36	38	29
£50 - £99.99	22	20	13	5
£100+	25	6	2	3
Mean	£73	£38	£31	£23
Mean 2014	*£64*	*£34*	*£31*	*£22*
Spend per week				
Nothing	2	1	2	2
Under £5	9	4	6	6
£5 - £19.99	28	16	15	13
£20 - £49.99	23	28	28	21
£50 - £99.99	14	26	27	36
£100+	12	21	20	21
Mean[18]	£55	£75	£74	£76
Mean 2014	*£61*	*£76*	*£74*	*£64*
Spend per month				
Nothing	2	1	2	2
Under £5	2	1	2	2
£5 - £19.99	5	3	4	3
£20 - £49.99	16	7	6	5
£50 - £99.99	15	13	11	10
£100+	46	72	72	77
Mean	**£222**	**£302**	**£295**	**£302**
Mean 2014	*£248*	*£303*	*£297*	*£256*
Base[18]	**247**	**842**	**1,674**	**564**

Spend by Town Centre

The highest spend per visit was at Oxford Street/Regent Street, Bromley and Kingston and the lowest spend per visit was at Harlesden.

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



3.13 Online Shopping

Summary

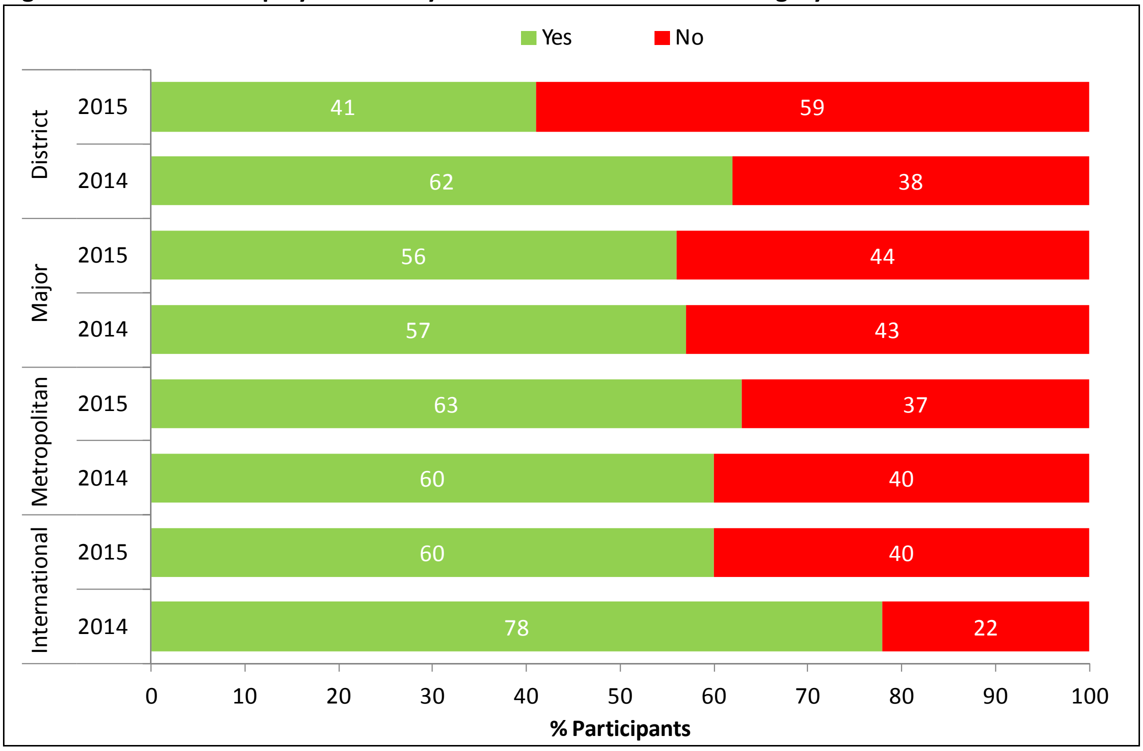
56% of town centre visitors shop by internet. Bus users and pedestrians are least likely to shop by internet.

The main goods purchased online are clothing/footwear (72%), books/CDs/DVDs/ leisure goods (53%) and tickets (36%).

In 2015 56% of town centre visitors said they shopped by internet. This was less than the 60% reported in 2014 although higher than the 52% in 2013 and 47% in 2011.

There were falls in reported shopping by internet by visitors to District and International town centres and little change at Major and Metropolitan town centres. See Figure 43.

Figure 43: Whether shop by internet by London Plan town centre category: 2015 v 2014



Weighted base: International: 2015, 299; 2014, 294; Metropolitan: 2015, 1222; 2014, 892; Major: 2015, 2107; 2014, 1761; District: 2015, 596; 2014, 589

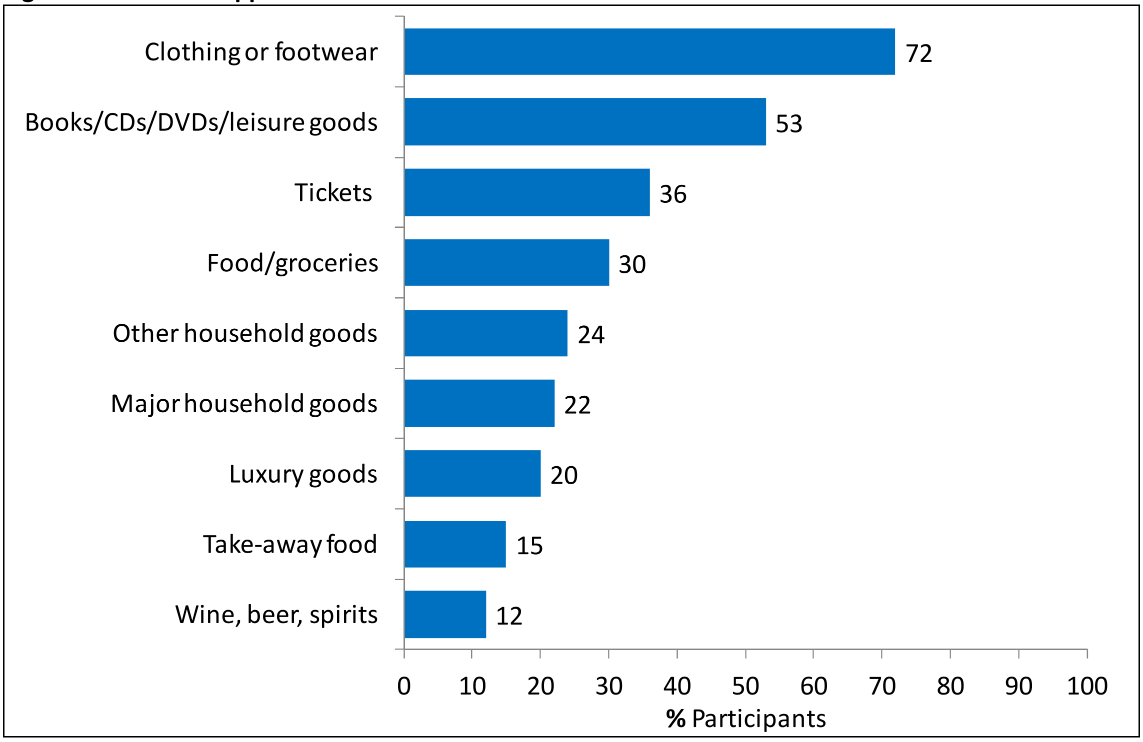
Bus users and pedestrians were least likely to shop by internet.

- Car 69%
- Train/Tube 67%
- Bicycle 61%
- Walk 50%
- Bus 49%.

The highest levels of internet shopping were by visitors to Bromley (65%), Enfield Town (64%), Romford (61%) and Wimbledon (61%) and the lowest by visitors to Hayes (37%), Harlesden (45%) and Wooolwich (47%).

The main goods purchased online are clothing/footwear (72% in 2015, 71% in 2014), books/CDs/DVDs/ leisure goods (53%) and tickets (36%).

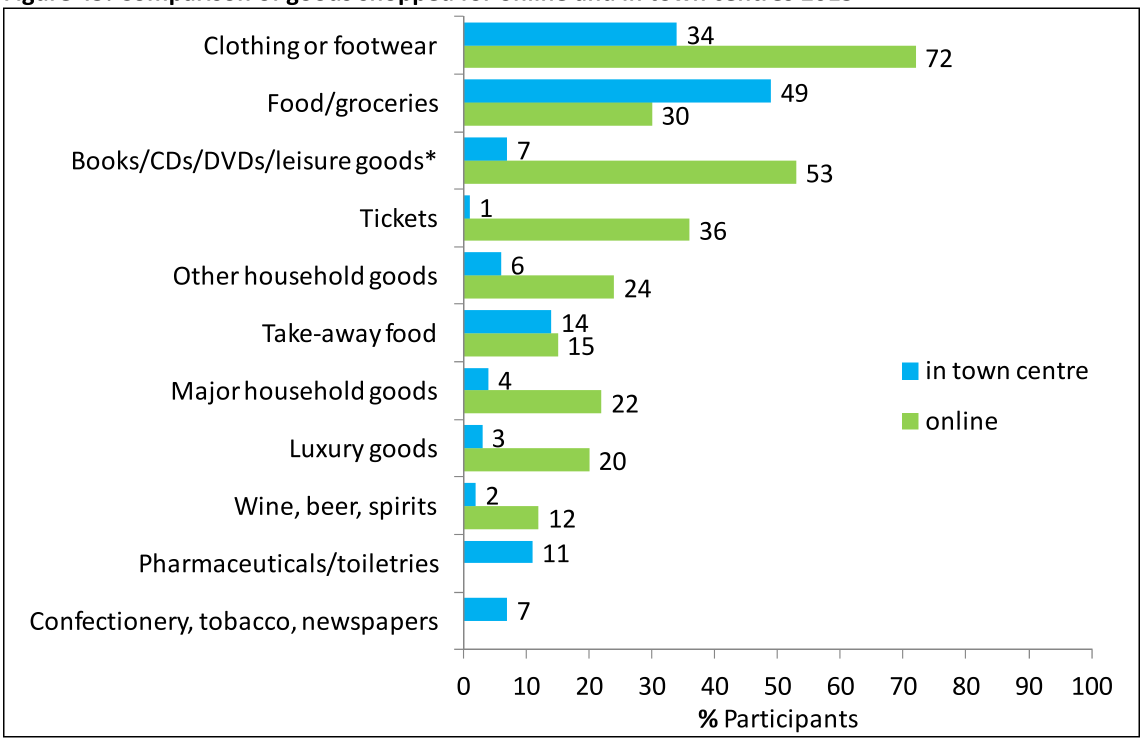
Figure 44: Goods shopped for online 2015



Weighted base: 2,371 who shop online

Figure 45 shows a comparison of the type of goods shopped for online and in town centres. Online predominates for clothing/footwear, books/CDs/DVDs/leisure goods, tickets, household goods and luxury goods. Town centres predominate for food/groceries.

Figure 45: Comparison of goods shopped for online and in town centres 2015



Weighted base: 2,371 who shop online and 4,222 who shop in town centres
* includes 'stationary' for shoppers in town centre
For online, 'confectionery, tobacco, newspapers' and 'pharmaceuticals/toiletries' not included

3.14 Respondent Characteristics

Summary

60% of town centre visitors were female.

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

66% were from a White background, 15% from a Black and 14% from an Asian background.

61% were employed either full time (46%), or part time (15%). 17% were retired and 7% were students.

The town centre sample has a slightly lower household income than the background London population.

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

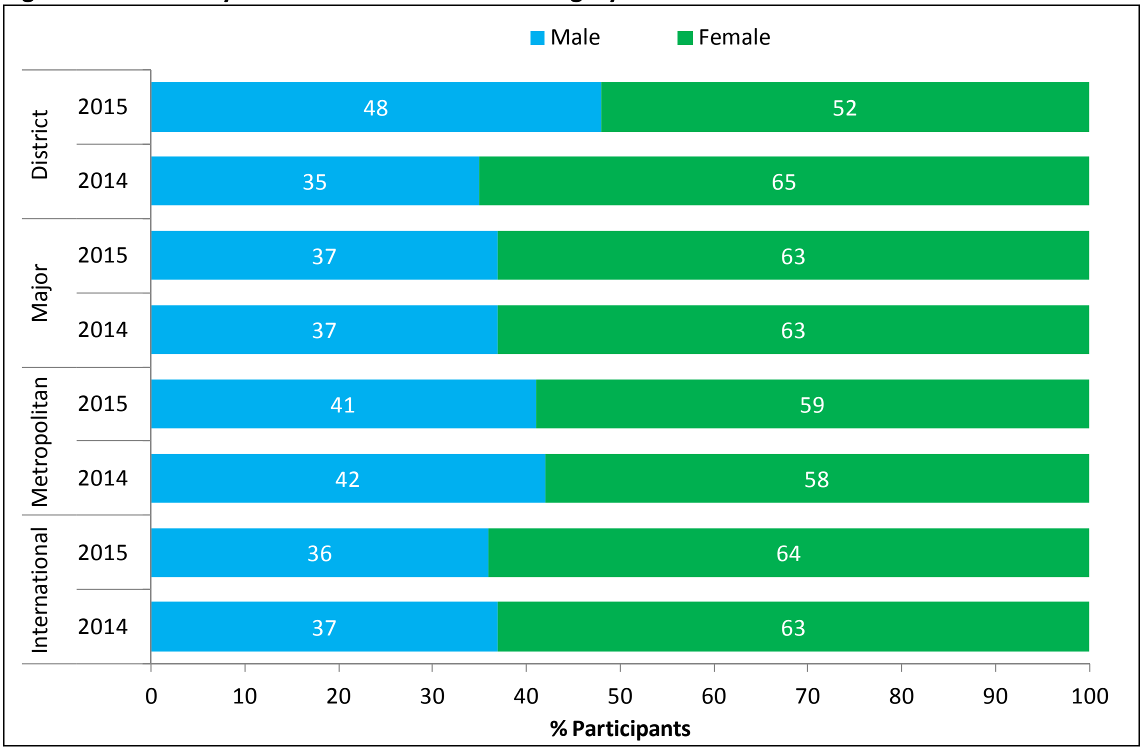
93% of town centre visitors live in London: 33% in Inner London Boroughs and 60% in Outer London Boroughs.

8% 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 (60% in 2015 and 62% in 2014). At District town centres the proportion of males interviewed in 2015 was much higher than in 2014: 48% compared to 35%. At other town centre categories there was little difference between years – see Figure 46.

Figure 46: Gender by London Plan town centre category: 2015 v 2014



Weighted base: International: 2015, 299; 2014, 294; Metropolitan: 2015, 1222; 2014, 892; Major: 2015, 2107; 2014, 1761; District: 2015, 596; 2014, 589

The town centres with the highest proportions of females were Woolwich (74%), Eltham (72%), Oxford Street/Regent Street (64%), Bromley (64%) and Lewisham (63%).

Details of gender by individual town centre are provided in Table 77in Appendix B.

Comparison over time

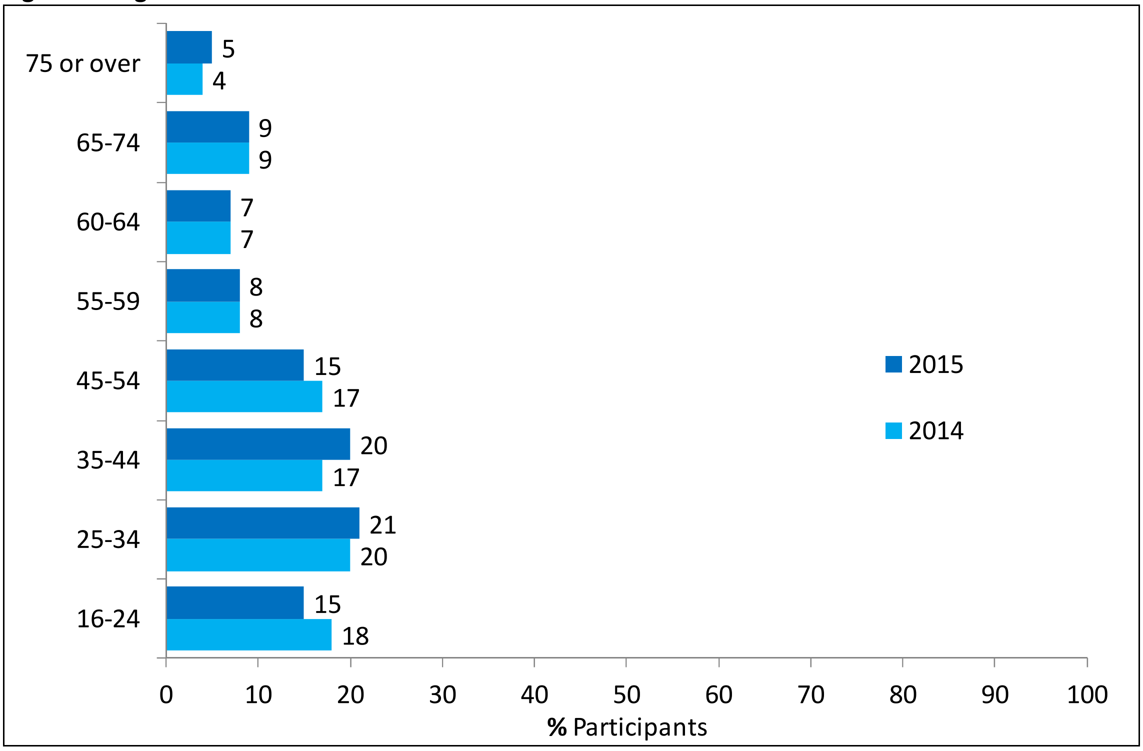
There has been little change in the proportion off female visitors since 2004.

	2015	**2014**	**2013**	**2011**	**2009**	**2004**
Male	40%	38%	42%	40%	42%	41%
Female	60%	62%	58%	60%	58%	59%

Age

There was an even spread of ages for the overall sample for both 2015 and 2014, with similar proportions in the four age groups under 55 years.

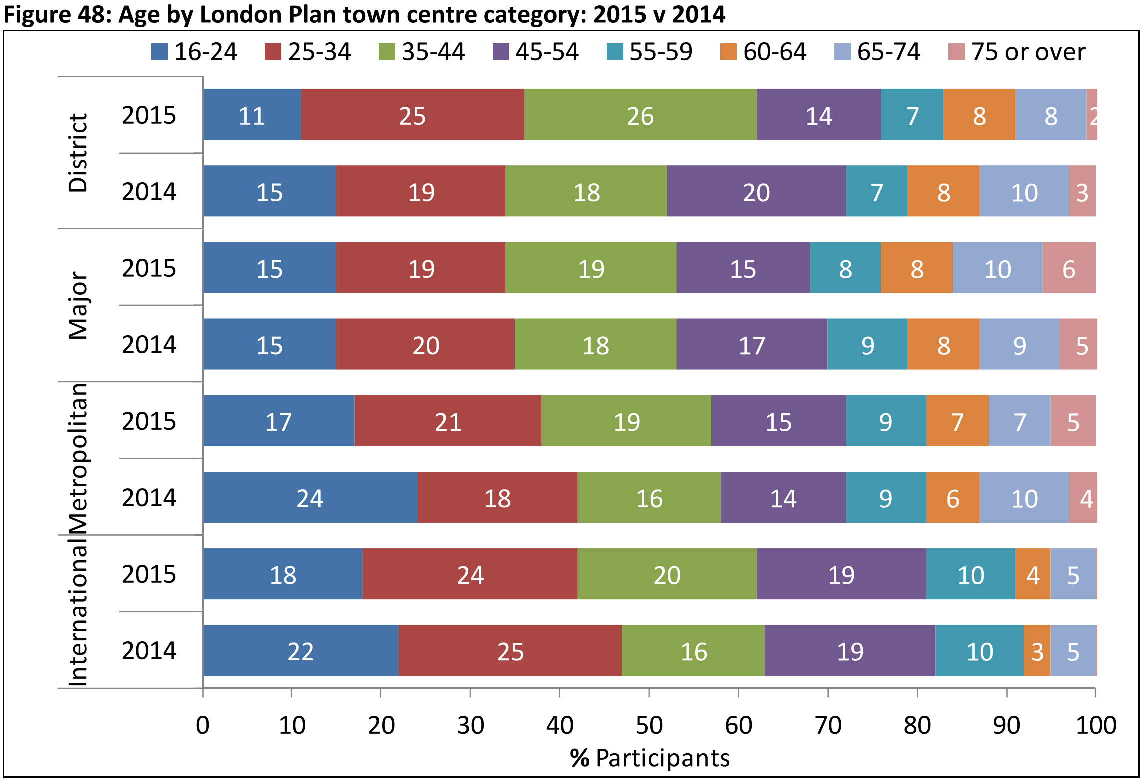
Figure 47: Age 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536

The proportion aged between 25 and 44 years old in District centres increased from 37% in 2014 to 51% in 2015. There was a smaller increase for the same age range in the Metropolitan town centres: from 34% in 2014 to 40% in 2015. See Figure 48.

Figure 48: Age by London Plan town centre category: 2015 v 2014



Weighted base: International: 2015, 299; 2014, 294; Metropolitan: 2015, 1222; 2014, 892; Major: 2015, 2107; 2014, 1761; District: 2015, 596; 2014, 589

In Eltham, the age profile was older than in the other locations with over a third (36%) aged over 60 years old. At Bromley, Wimbledon and Enfield Town about a quarter were aged over 60 years old. The age profile in Oxford Street/Regent Street and Ilford was younger than the average with 10% and 11% respectively aged over 60.

Details of age by individual town centre are provided in Table 79 in Appendix B.

Comparison over time

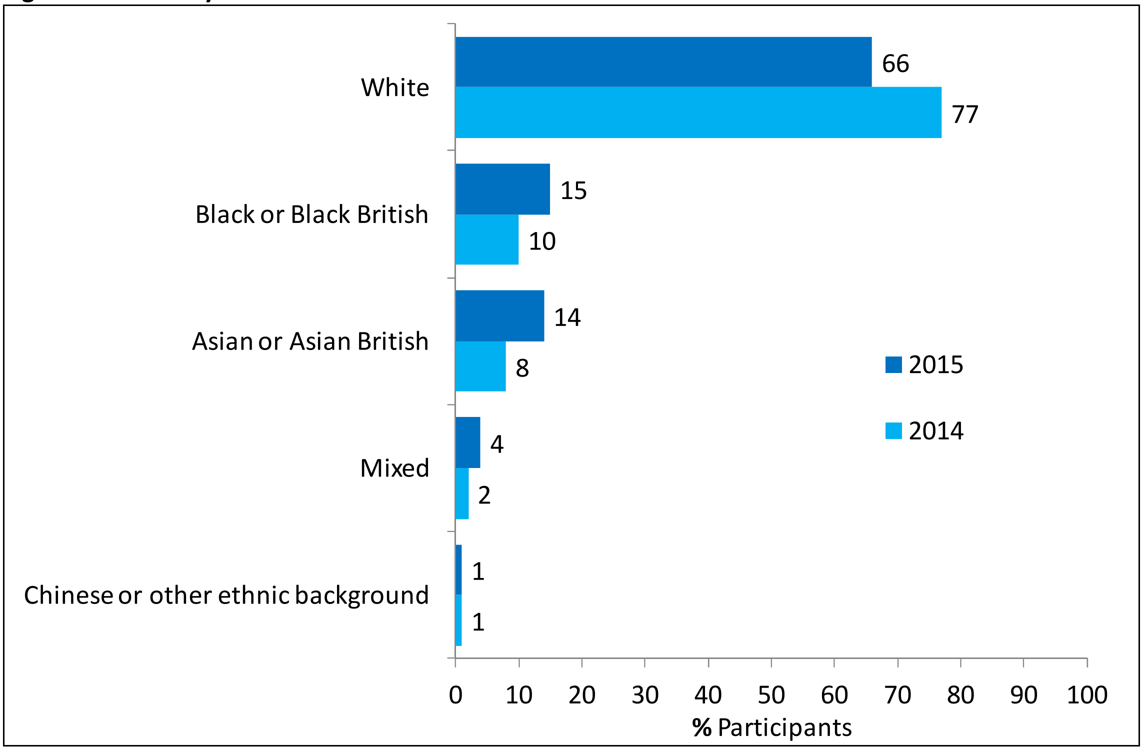
There is a similar age profile between 2015 and 2011.

	2015	2014	2013	2011	2009	2004
16-24	15%	18%	17%	17%	23%	18%
25-34	21%	20%	22%	22%	22%	22%
35-44	20%	17%	19%	19%	20%	22%
45-54	15%	17%	16%	17%	12%	38% aged 45 or older. Different age ranges used
55-64	15%	15%	14%	13%	11%	
65-74	9%	9%	8%	8%	7%	
75+	5%	4%	3%	4%	3%	

Ethnicity

Two thirds of the sample was from a White background, a large fall from the 77% in 2014 (reflecting the change in nature of town centres between the two years). 15% were from a Black and 14% from an Asian background (10% and 8% respectively in 2014) as shown in Figure 49.

Figure 49: Ethnicity 2015 v 2014

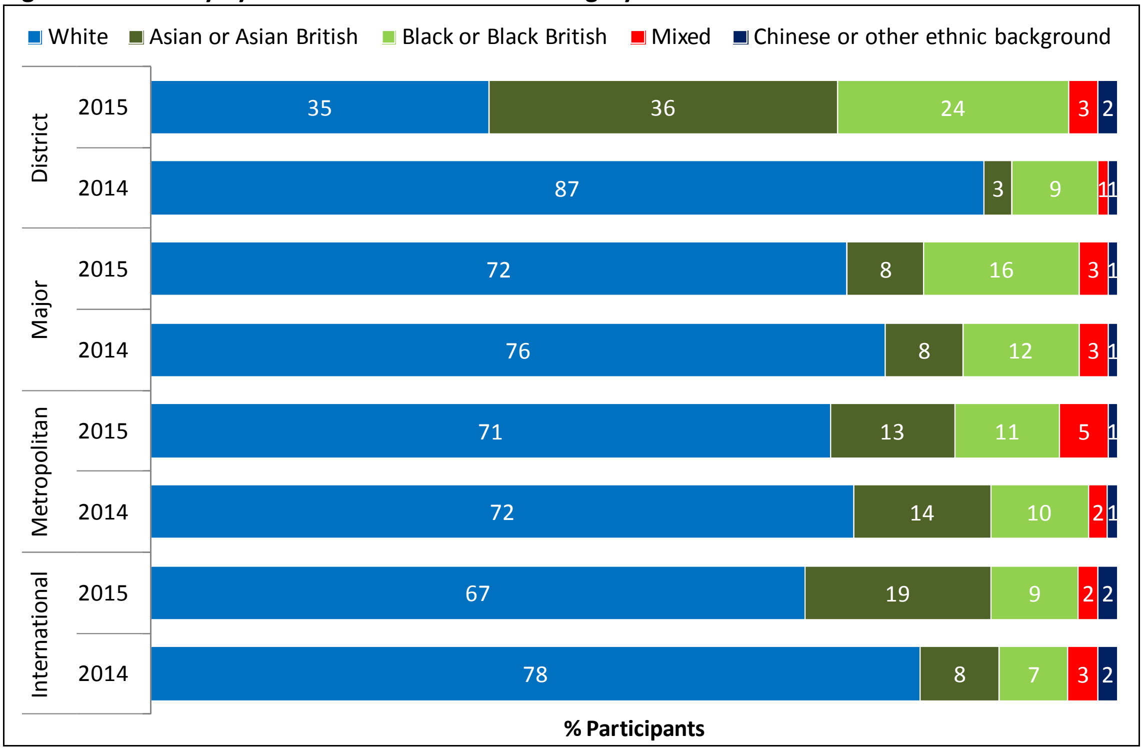


Weighted base: all respondents: 2015: 4,224; 2014: 3,536

Analysis by London Plan category of town centres shows a very large increase in the proportion of Asian and Black participants in District town centres in 2015 compared to 2014 (reflecting the change in nature of District town centres between the two years: Hayes and Harlesden in 2015, Clapham Old Town and Hornchurch in 2014).

The proportion of Asian visitors also increased at the International town centre from 8% n 2014 to 19% in 2015 (with a similar fall in White visitors).

Figure 50: Ethnicity by London Plan town centre category: 2015 v 2014



Weighted base: International: 2015, 299; 2014, 294; Metropolitan: 2015, 1222; 2014, 892; Major: 2015, 2107; 2014, 1761; District: 2015, 596; 2014, 589

At Eltham, Kingston, Wimbledon and Bromley the proportion from a White background was much higher than average (87%, 85%, 84% and 83% respectively).

In Hayes and Harlesden 31% and 38% respectively were from a White background.

The town centres with the highest proportion of Asian visitors were Hayes (47%), Ilford (35%) and Harlesden (25%).

The town centres with the highest proportion of Black visitors were Harlesden (30%), Lewisham (25%) and Walthamstow (20%).

Details of ethnicity by individual town centre are provided in Table 85 in Appendix B.

Comparison over time

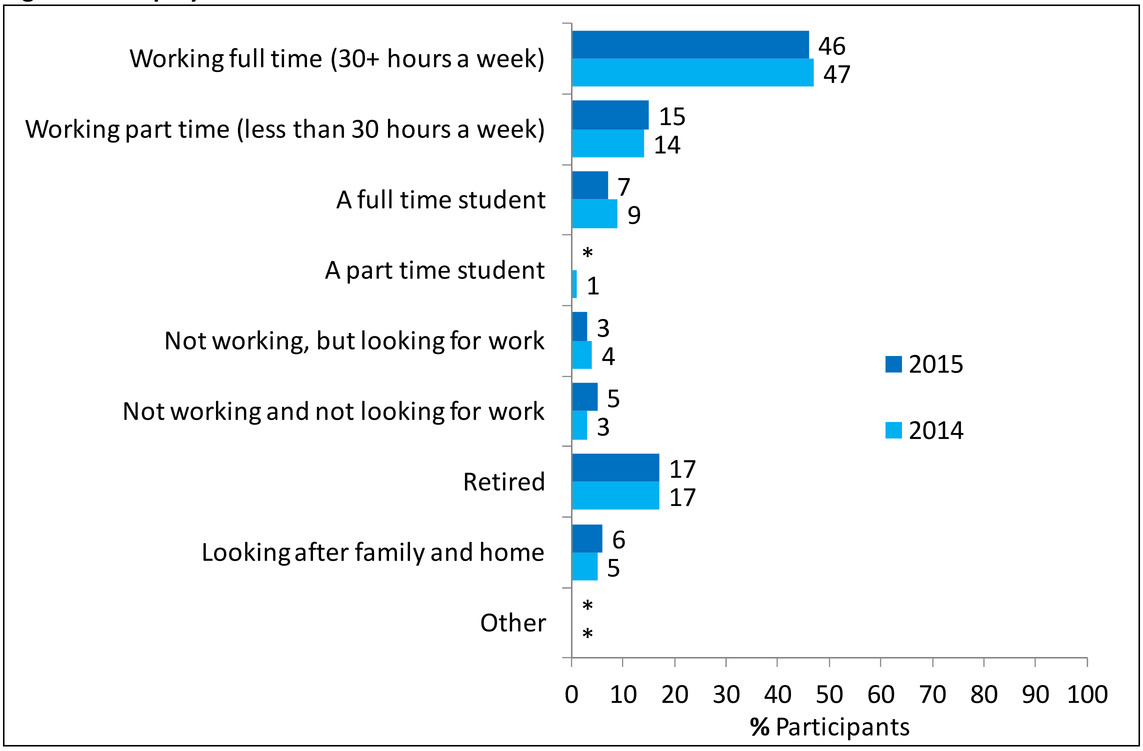
The 2015 ethnic group make up was similar to that in 2013 following a large increase in White visitors and fall in Black and Asian visitors in 2014.

	2015	2014	2013	2011	2009	2004
White	66%	77%	65%	71%	69%	70%
Black or Black British	15%	10%	17%	16%	16%	12%
Asian or Asian British	14%	8%	12%	6%	9%	12%
Mixed	4%	2%	3%	5%	4%	1%
Other	1%	1%	1%	1%	1%	2%

Employment status

The majority of those who took part in the survey were employed either full time (46% in 2015, 47% in 2014), or part time (15% in 2015, 14% in 2014). Seventeen per cent were retired in both years and 7% were students in 2015 (10% in 2014).

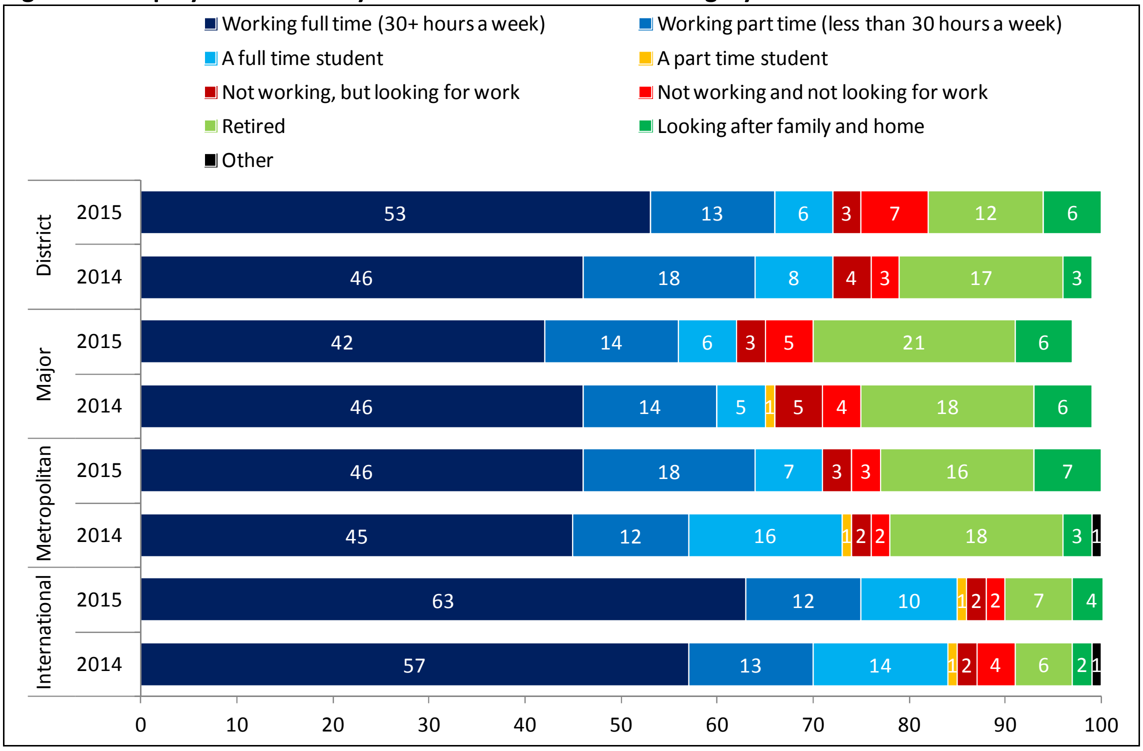
Figure 51: Employment Status 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536
* = less than 0.5%

Those in the International category town centre were much more likely to be employed full time than those in other category town centres – 63% in 2015 compared to between 42% and 53%. Those in International category town centre were also less likely to be retired than those in other category town centres. See Figure 52.

Figure 52: Employment Status by London Plan town centre category: 2015 v 2014



Weighted base: International: 2015, 299; 2014, 294; Metropolitan: 2015, 1222; 2014, 892; Major: 2015, 2107; 2014, 1761; District: 2015, 596; 2014, 589

The highest proportion of employed respondents was in (75%), Ilford (73%), and Hayes (69%). The lowest proportions were in Woolwich (46%) and Eltham (52%).

There were high proportions of retired people in Eltham (28%), Wimbledon (23%) and Enfield Town (22%).

The highest proportions of students were in Oxford Street/Regent Street (11%) and Lewisham (10%).

Details of employment status by individual town centre are provided in Table 83 in Appendix B.

Comparison over time

There has been little change in the proportion of employed respondents since 2011.

	2015	**2014**	**2013**	**2011**	**2009**	**2004**
Working full time	46%	47%	45%	44%	40%	41%
Working part time	15%	14%	17%	16%	15%	14%
Other	39%	39%	38%	40%	45%	45%

Household Income

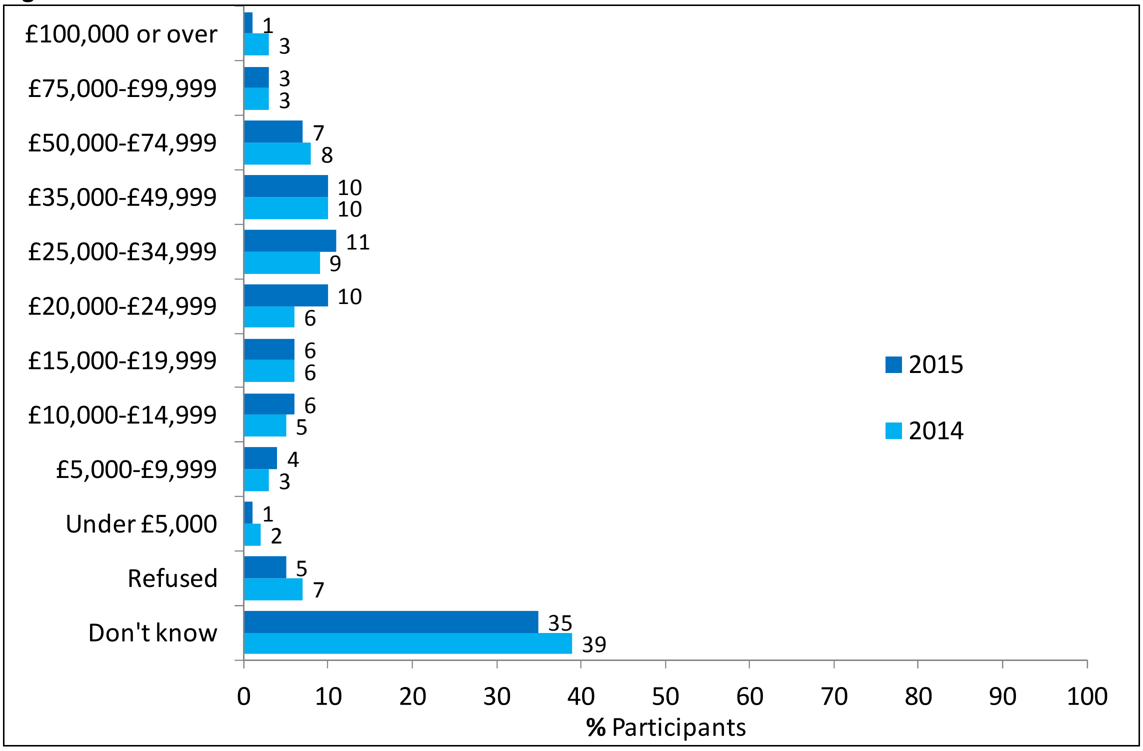
Over half the sample (55% in 2015, 52% in 2104) said they were the chief income earner of the household.

The proportion was highest in District town centres (63%) and lowest in the in International town centre (50%).

Annual household income was probed. Forty per cent either refused to answer or said they did not know (46% in 2014).

There was a fairly even income distribution across the income breaks shown to respondents with a median income band in 2015 of £25,000-£34,999.

Figure 53: Gross annual household income before deductions: 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536

Visitors to the International category town centre had higher incomes than visitors to other category town centres.

Table 27: Gross annual household income before deductions by London Plan town centre category: 2015 v 2014

	International		Metropolitan		Major		District	
	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %	2015 %	2014 %
Under £5,000	1	1	1	3	2	1	2	1
£5,000-£9,999	*	1	3	3	5	4	3	3
£10,000-£14,999	3	3	4	5	7	6	7	5
£15,000-£19,999	2	5	6	6	6	6	8	5
£20,000-£24,999	5	5	11	6	10	7	13	6
£25,000-£34,999	10	8	12	10	10	9	15	9
£35,000-£49,999	10	7	12	9	9	11	12	9
£50,000-£74,999	10	11	9	8	7	7	2	9
£75,000-£99,999	7	5	3	3	2	2	1	4
£100,000 or over	6	7	1	2	1	3	*	3
Don't know	46	40	36	37	33	38	34	42
Refused	1	8	4	8	7	7	3	5
Weighted base	**299**	**294**	**1,222**	**889**	**2,106**	**1,756**	**596**	**589**

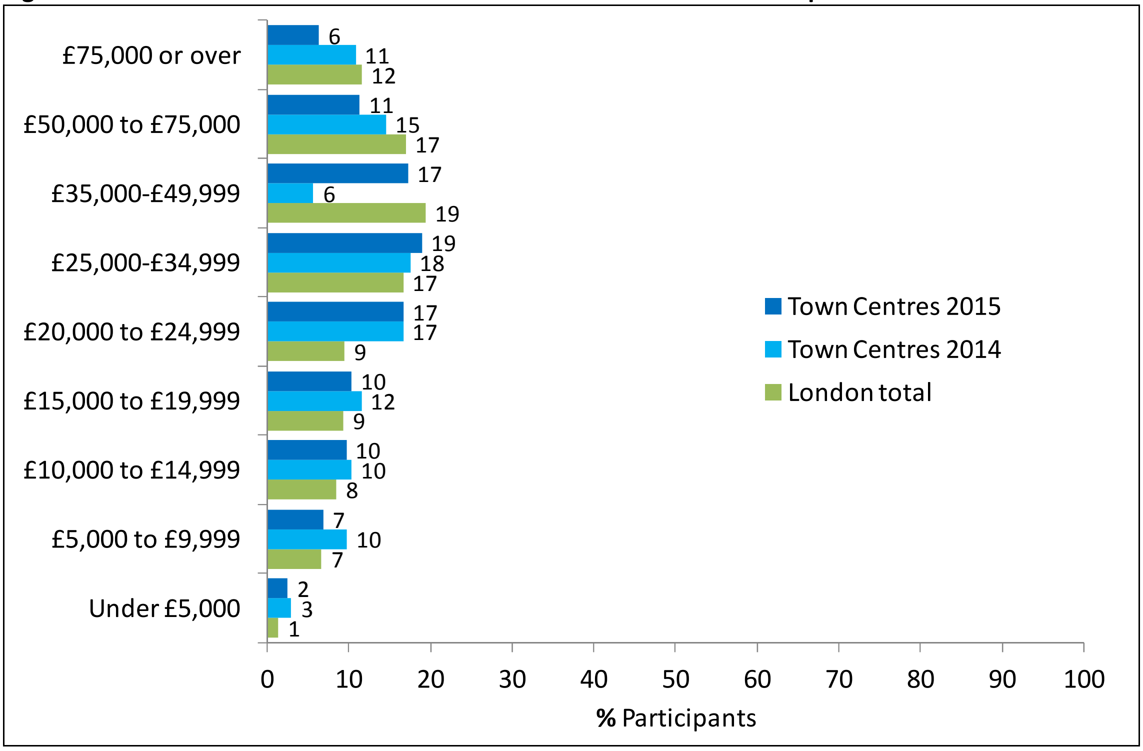
* = less than 0.5%

Details of income by individual town centre are provided in Table 85 in Appendix B.

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

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

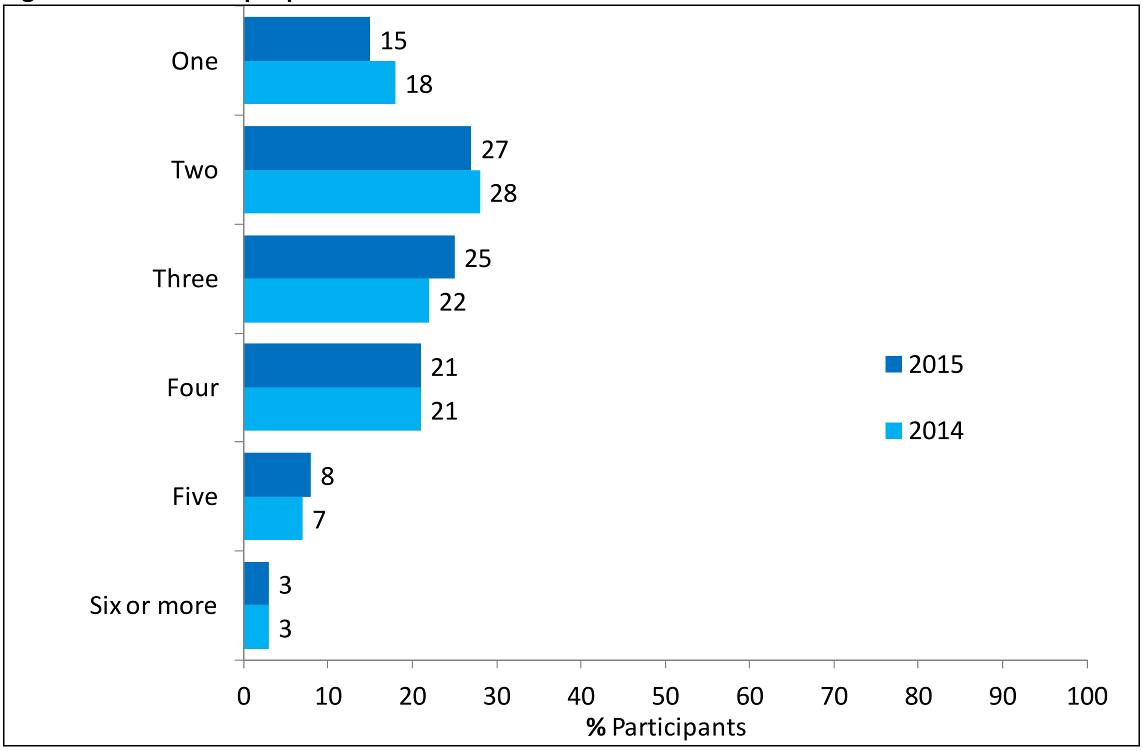
Figure 54: Town centres annual household income in 2015 and 2014 compared to overall London



Household Size

The median household size was two, representing 27% of households in 2105 (28% in 2014). Fifteen per cent of respondents lived alone in 2105 (18% in 2014)..

Figure 55: Number of people in household: 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536

In Ilford (43%), Harlesden (41%), Oxford Street/Regent Street (38%), Hayes (37%) and Bromley (36%) over 35% lived in larger households of four or more people.

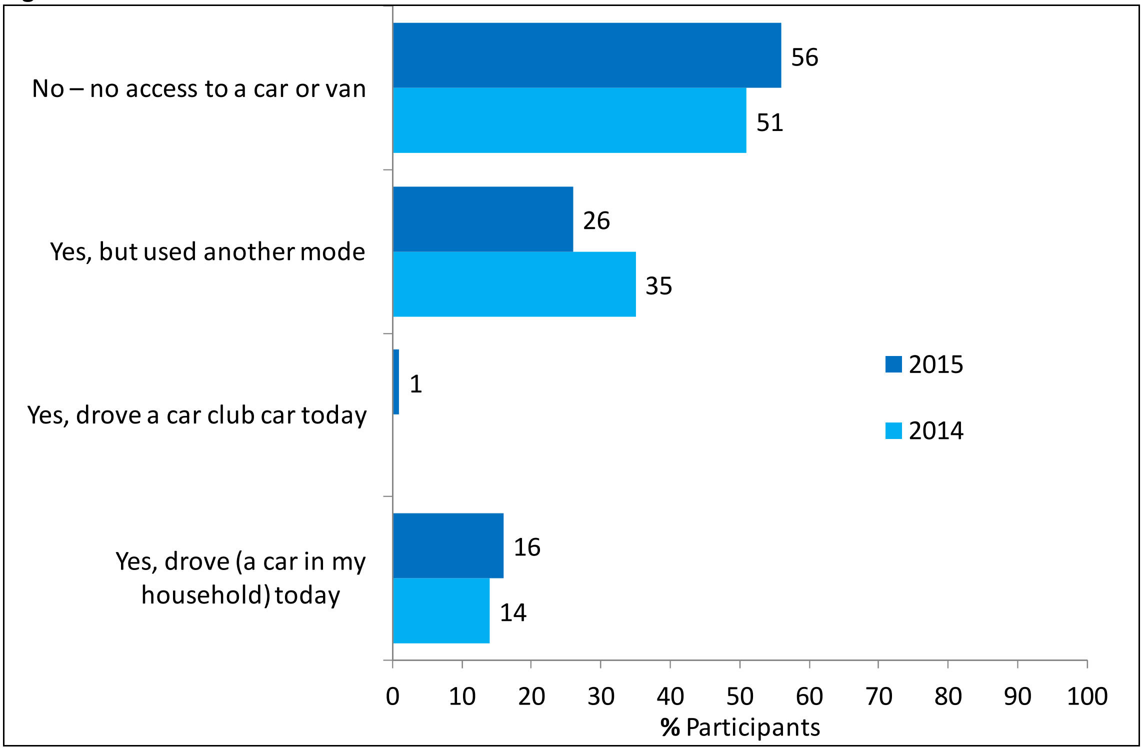
Over a fifth in Eltham (22%), Wimbledon (21%), Woolwich (21%) and Lewisham (21%) lived in one person households.

Details of household size by individual town centre are provided in Table 87 in Appendix B.

Access to a Car

Less than half the sample (44% in 2105, 49% in 2014) said they had access to a car that they could have used to travel to the town centre.

Figure 56: Access to a car: 2015 v 2014

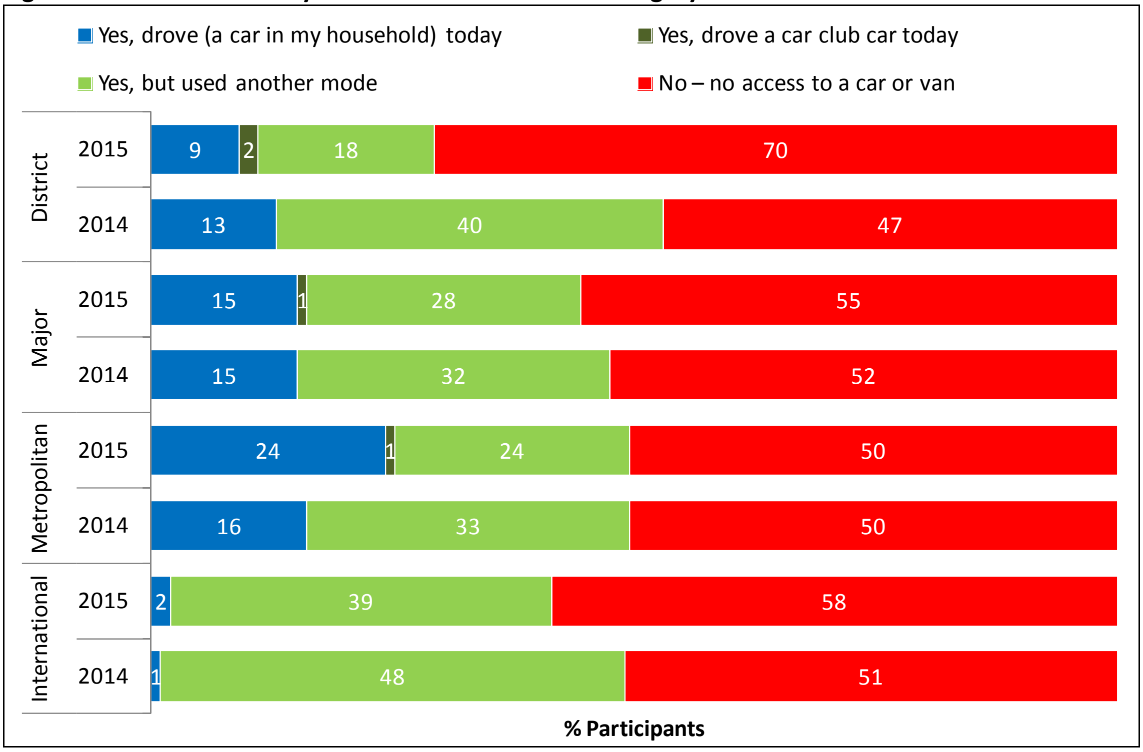


Weighted base: all respondents: 2015: 4,224; 2014: 3,536

Note: 'yes, drove a car club car today' was added in 2015

Car access was lowest in District town centres in 2015 although highest in 2014.

Figure 57: Access to a car by London Plan town centre category: 2015 v 2014



Weighted base: International: 2015, 299; 2014, 294; Metropolitan: 2015, 1222; 2014, 892; Major: 2015, 2107; 2014, 1761; District: 2015, 596; 2014, 589

Note: 'yes, drove a car club car today' was added in 2015

There was a relatively high level of access to a car in Bromley (63%), Kingston (59%), Enfield Town (57%), Wimbledon (56%) and Eltham (55%).

Car access in Harlesden (25%) and Woolwich (29%) was relatively low.

Details of access to a car by individual town centre are provided in Table 89 in Appendix B.

Comparison over time

The highest proportion drove to the town centre since 2004.

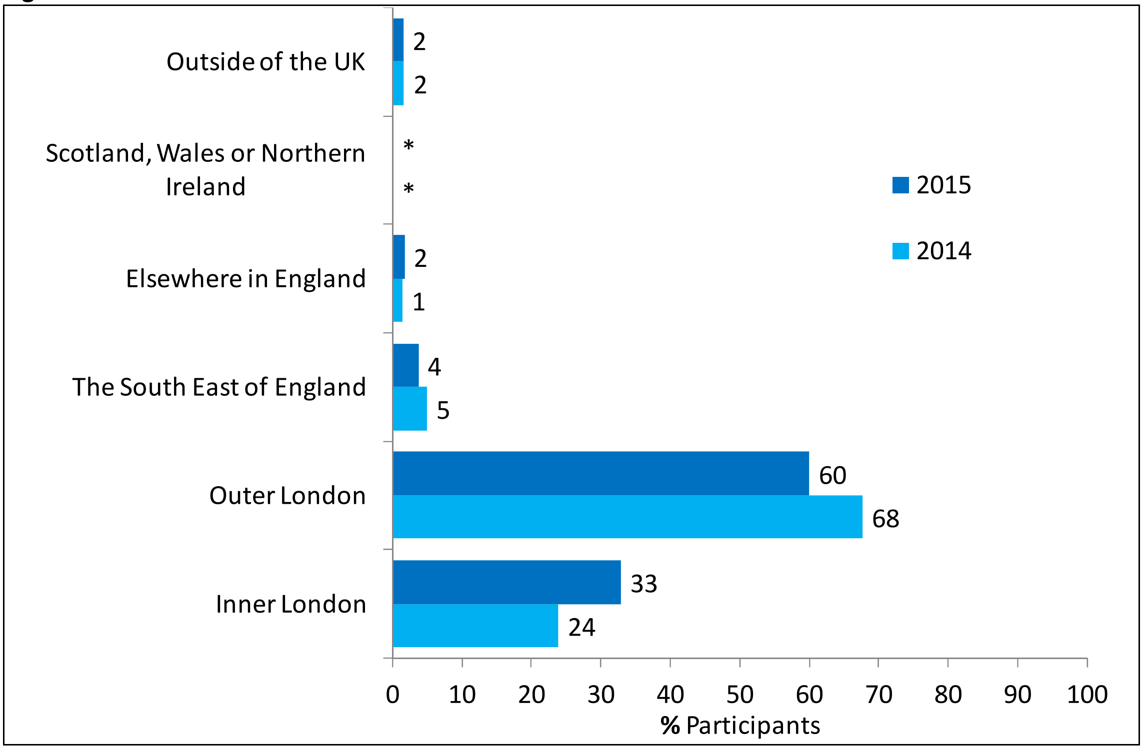
	2015	2014	2013	2011	2009	2004
Yes, drove today	17%	14%	14%	15%	16%	22%
Yes, used other mode	26%	35%	29%	30%	31%	28%
No access to a car	56%	51%	56%	55%	52%	50%

Where town centre visitor lives

Overall, 93% of town centre visitors lived in London (92% in 2014): 33% in Inner London Boroughs[20] and 60% in Outer London Boroughs (24% and 68% respectively in 2014).

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

Figure 58: Where live: 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536
* = less than 0.5%

Details of where the respondent lives by individual town centre are provided in Table 97 in Appendix B.

Physical and Mental Impairments

Eight per cent of the sample in both 2015 and 2014 had a long-term physical or mental disability which limits daily activities or work they could do.

Table 28: 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

	2015 %	2014 %
No, none	92	92
Mobility impairment	5	4
Visual impairment	*	1
Hearing impairment	1	1
Learning disability	*	*
Mental health condition	1	1
Serious long term illness	1	1
Other	*	1
Weighted base		**3,533**

* = less than 0.5%

In 2015 all were asked were asked how easy they found it to move around the area. 94% said it was easy (52% very easy, 42% easy). Just 2% said it was difficult and less than 0.5% that it was very difficult.

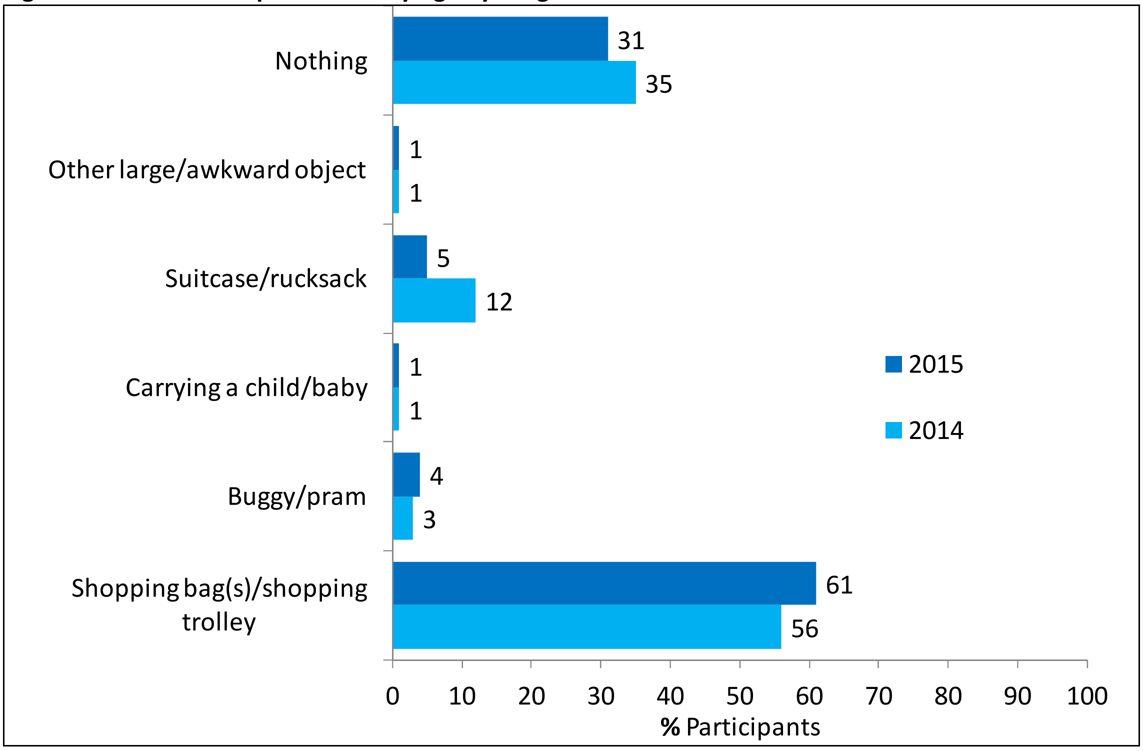
Six per cent of those aged over 60 years old said it was difficult compared to between 1% and 2% for younger participants.

Six per cent of those who had had a long-term physical or mental disability which limits daily activities or work they could do used a wheelchair.

Whether carrying anything

Over half the town centre visitors were carrying shopping bags or using a shopping trolley (61%) and 5% had a suitcase or rucksack.

Figure 59: Whether respondent carrying anything: 2015 v 2014



Weighted base: all respondents: 2015: 4,224; 2014: 3,536

Details of what was carried by individual town centre are provided in Table 95 in Appendix B.

4. CYCLE RESULTS

4.1 Introduction

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

The cycle boosters were undertaken at the following seven town centres in each year (sites covered in both phases are shaded):

2014	2015
Barking	Enfield Town
Enfield Town	Kingston
Kingston	Lewisham
Oxford Street/Regent Street	Oxford Street/Regent Street
Richmond	Walthamstow
Uxbridge	Wimbledon
Walthamstow	Woolwich

In total 355 interviews were undertaken in 2015 and 374 in 2014.

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

4.2 Purpose of Visit

The majority of cyclists (66% in 2015 and 68% in 2014) do not live or work within 10 minutes walk of the town centre.

In 2015 24% live in the area, 6% work in the area and 4% both live and work within 10 minutes walk of the town centre. In 2014 19% live in the area, 9% work in the area and 5% both live and work within 10 minutes walk of the town centre.

In 2015 Kingston was most likely to attract cyclists from a wider catchment area: 87% were from more than 10 minutes walk away. 77% from Oxford Street/Regent Street and 76% from Enfield were from more than 10 minutes walk away. By contrast, 41% of those visiting Lewisham were from more than 10 minutes walk away. For the other three centres the proportion was between 53% and 65%

In 2014 Richmond was most likely to attract cyclists from a wider catchment area: 85% were from more than 10 minutes walk away. By contrast, 51% of those visiting Walthamstow were from more than 10 minutes walk away. For the other five centres the proportion was between 66% and 68%.

Reasons for visiting town centre

All visitors were recruited on the basis that they were shopping, using a service or doing both in the centres[21]. Shopping was the predominant purpose and the main reason for visiting for 58% of cyclists in 2015 (57% in 2014). Services were used by 21% and it was the main reason for visiting for 10% (30% and 14% respectively in 2014).

Eating and drinking out was also important being mentioned by 21% (22% in 2014) but was only the main purpose for 8%. All reasons and the main reasons for visiting the area are as shown in Table 29.

Table 29: Reasons for visiting town centre: 2015 v 2014

	All purposes		Main purpose	
	2015 %	2014 %	2015 %	2014 %
Shopping	71	75	58	57
Using service	21	30	10	14
Eating/drinking out	21	22	8	8
Using public amenity	5	9	3	4
Work here	8	9	6	8
Other social/leisure	6	5	5	2
Personal business	2	4	2	2
Live here	3	4	1	2
General recreation	5	2	3	1
Travelling through the area	1	2	0	*
Visiting friends and relatives	4	2	3	1
Delivering goods	0	1	0	*
Window shopping	3	1	1	*
Other	1	1	1	1
Base	**355**	**374**	**355**	**374**

* = less than 0.5%

The main reason for visiting were similar for all areas as shown in Table 136 in Appendix D.

4.3 Time Spent in Town Centre

The majority (59% in both years) said they were planning to spend at least one hour in the town centre with 45% spending between one and three hours.

Table 30: Time spent in town centre: 2015 v 2014

	2015 %	2014 %
Under 5 minutes	1	*
5-14 minutes	6	2
15-29 minutes	8	10
30-59 minutes	26	29
1-3 hours	45	46
More than 3 hours	14	13
Base	**355**	**374**

* = less than 0.5%

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

Those in Oxford Street/Regent Street and Kingston were planning on spending the most time in the town centre: 94% and 74% over an hour compared to between 35% and 56% for the other town centres.

4.4 Frequency of Visiting

The majority of cyclists visit the town centre on a regular basis with four fifths visiting the area once a week or more often as shown in Table 31.

Table 31: Frequency of visiting town centre: 2015 v 2014

	2015 %	2014 %
5 or more days a week	23	30
3 or 4 days a week	18	19
2 days a week	17	15
Once a week	21	16
Once a fortnight	11	9
About once a month	6	9
Less than once a month	4	2
First time	0	1
Base	**355**	**374**

In 2015 cyclists in Walthamstow and Wimbledon visit most frequently: 89% and 86% respectively visit once a week or more often. By contrast cyclists in Oxford Street/Regent Street visit least frequently: 66% visit once a week or more often

In 2014 cyclists in Uxbridge and Walthamstow visit most frequently: 97% and 96% respectively visit once a week or more often. By contrast cyclists in Oxford Street/Regent Street and Richmond visit least frequently: 50% and 64% respectively visit once a week or more often.

4.5 Mode of Transport

Why Cycle used

All reasons and the main reason for choosing to travel by cycle to access the area are shown in Table 32.

Table 32: All reasons and main reason for using cycle rather than any other method of transport to access area

	All reasons		Main reason	
	2015 %	2014 %	2015 %	2014 %
Quicker	47	53	19	22
Need/enjoy exercise/healthy	46	46	28	24
Cheaper/less expensive	45	49	21	26
Easier/more convenient	39	27	13	10
More direct	23	28	4	3
Avoids parking difficulties	15	11	5	2
More relaxing/comfortable	14	11	3	2
Live very close by	12	5	2	1
Weather issues	6	11	1	3
Going to more than one place	4	7	1	2
No car/can't drive	4	3	1	0
Safer	3	6	0	*
Only method possible	3	2	1	1
Had heavy bags/shopping to carry	1	2	1	1
Avoid the congestion charge	1	2	0	*
Travelling with children	*	1	0	*
Base	**355**	**374**	**355**	**374**

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

Of all reasons given, about half cited speed (47% in 2015, 53% in 2014), that they need/enjoy the exercise (46% in both years) and low cost (45% in 2015, 49% in 2014).

The main reasons given for cycling were that they need/enjoy the exercise (28% in 2015, 24% in 2014), cost (21% in 2015, 26% in 2014), and speed (19% in 2015, 22% in 2014).

Other modes of transport sometimes used

Bus was the most used 'other' mode with 55% of cyclists mentioning it in 2015 and 33% in 2014. 27% of bicycle users also sometimes walk to the town centres (21% in 2014) and 20% use a private vehicle.

Table 33: Other modes used to town centre

	2015 %	2014 %
Bus	55	33
Walked	27	21
Car/van/lorry	20	20
Train	9	11
Tube	15	9
Taxi/minicab	6	9
Motorbike/moped/scooter	2	*
Barclays Cycle Hire	*	*
Other	0	1
Base	**355**	**374**

* = less than 0.5%

Frequency of cycle use

The frequency of cycling to the area was lower for the 2015 sample than the 2014 sample. In 2015 73% cycled to the area once a week or more compared to 79% in 2014 (the latter includes 31% who cycled to the town centre five or more days a week).

Table 34: Frequency of using cycle to travel to this area

	2015 %	2014 %
5 or more days a week	17	31
3 or 4 days a week	16	19
2 days a week	18	14
Once a week	22	15
Once a fortnight	11	9
About once a month	8	8
Less than once a month	7	3
First time	1	1
Base	**355**	**374**

The mean weekly frequency of cycling to the area of the town centre is 2.2 times (2.9 in 2014).

In 2015 those cycling to Oxford Street/Regent Street and Walthamstow were the most frequent visitors by cycle (2.7 and 2.5 times a week respectively) and those cycling to Kingston were the least frequent visitors by cycle (1.6 times a week on average).

In 2014 those cycling to Uxbridge and Walthamstow were the most frequent visitors by cycle (4.0 and 3.8 times a week respectively) and those cycling to Oxford Street/Regent Street were the least frequent visitors by cycle (1.9 times a week on average).

4.6 Encouraging Cycling

In the 2015 survey cyclists were shown a screen with the following list and asked which of them encouraged them or influenced their choice to cycle there that day:

- Cycle lanes on the roads
- Dedicated cycle paths
- Cycle routes to / through the town centre
- Little road traffic
- Free on-road cycle training
- Bicycle hire scheme
- Bicycle parking facilities in this area
- Bicycle parking facilities at / near your home
- None of these / nothing

In 2014 cyclists were shown a similar list (see below) 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.

In 2015 the main things that encouraged / influenced their choice to cycle there that day were 'dedicated cycle paths' (42%) and 'cycle lanes on the roads' (40%). Also important were 'cycle routes to / through the town centre' (25%) and 'little road traffic' (23%) and '(Better) bicycle parking facilities in this area' (28%).

In 2014, when cyclist were asked which improvements would encourage them to cycle more the main improvements were 'more cycle lanes on the roads' (66%), 'more dedicated cycle paths' (59%), 'less road traffic' (28%) and '(Better) bicycle parking facilities in this area' (28%).

Table 35: Things that encouraged / influenced their choice to cycle there that day

	2015 %	2014 %
Dedicated cycle paths	42	59
Cycle lanes on the roads	40	66
Cycle routes to / through the town centre	25	n/a
Little road traffic	23	28
(Better) bicycle parking facilities in this area	19	28
Bicycle parking facilities at/near your home	11	6
Free on-road cycle training	8	9
Bicycle hire scheme	6	6
None of these/nothing	32	12
Don't know	2	1
Base	**351**	**374**

Note: different question and slightly different list used in 2014

Table 36 shows the 2015 data by location. Key findings are:

- 'Dedicated cycle paths' was mentioned most often in Oxford Street/Regent Street (83%) and Wimbledon (64%)
- 'Cycle lanes on the roads' was mentioned most often in Wimbledon (57%) and Walthamstow (53%)
- 'Cycle routes to / through the town centre' was mentioned most often in Wimbledon (48%) and Walthamstow (34%)
- 'Little road traffic' was mentioned most often in Wimbledon (42%) and Walthamstow (32%).
- 'Bicycle parking facilities in this area' was mentioned most often in Wimbledon (48%) and Kingston (34%).
- 'Bicycle hire scheme' was mentioned by 28% in Wimbledon.

Table 36: Things that encouraged / influenced their choice to cycle there that day by town centre 2015

	Enfield Town %	Kingston %	Lewisham %	Oxford Street/ Regent Street %	Walthamstow %	Wimbledon %	Woolwich %
Dedicated cycle paths	18	34	35	83	53	64	13
Cycle lanes on the roads	20	26	22	87	53	56	20
Cycle routes to / through the town centre	30	16	14	21	34	48	9
Little road traffic	8	16	27	28	32	42	9
Bicycle parking facilities in this area	8	34	6	11	13	48	7
Bicycle parking facilities at/near your home	4	11	0	6	15	36	2
Free on-road cycle training	2	11	2	11	17	12	2
Bicycle hire scheme	2	2	0	0	6	28	2
None of these / nothing	34	39	37	2	23	24	61
Don't know	2		2	0	6		2
Base	**50**	**62**	**49**	**47**	**47**	**50**	**46**

Table 37 shows the 2014 data by location. Key findings are:

- '(More) cycle lanes on the roads' was mentioned most often in Barking (74%)
- '(More) dedicated cycle paths' was mentioned most often in Richmond (72%), Kingston (69%) and Walthamstow (69%)
- 'Less road traffic' was mentioned most often in Oxford Street/Regent Street (51%) and Richmond (46%)
- '(Better) bicycle parking facilities in this area' was mentioned most often in Uxbridge (45%) and Richmond (43%)
- 'Bicycle hire scheme' was mentioned by 16% in Richmond.

Table 37: Things which would encourage cycling more often in this area by town centre 2014

	Barking %	Enfield Town %	Kingston %	Oxford Street/ Regent Street %	Richmond %	Uxbridge %	Walthamstow %
(More) cycle lanes on the roads	74	67	69	65	67	62	60
(More) dedicated cycle paths	40	40	69	47	72	66	69
Less road traffic	21	20	19	51	46	17	22
(Better) bicycle parking facilities in this area	9	11	24	35	43	45	29
Free on-road cycle training	2	4	4	14	25	2	5
Bicycle hire scheme	0	2	4	6	16	6	2
(Better) bicycle parking facilities at/near your home	6	2	6	2	8	17	4
None of these/nothing	15	18	9	8	16	9	13
Don't know	2	0	0	6	0	0	2
Base	**47**	**45**	**70**	**49**	**61**	**47**	**55**

4.7 Attitudes towards Town Centres

Improvements to Town Centre

Cyclists were asked in what way the area could be improved. The suggestion most often mentioned was 'improve cycle facilities' (mentioned by 33% in 2015 and 42% in 2104).

Other important improvements were 'more pleasant/greener environment' (31% in 2105 and 27% in 2104), 'better range of shops' (29% in 2105, 22% in 2104), 'Improve shops/better quality shops' (25% in 2015, 19% in 2014), 'more leisure facilities' (24% in 2105, 23% in 2014) and 'less traffic' (24% in 2105, 22% in 2014).

Seven per cent of cyclists (10% in 2104) thought that there was nothing that could be done to improve the centres.

When asked what was the single most important improvement to be made, 'improve cycle facilities' was the main priority in both 2015 and 2014 as shown in Table 38.

Table 38: Priorities for improvements to the area: 2015 v 2014

	All mentions		Most important	
	2015 %	2014 %	2015 %	2014 %
Nothing	7	10	7	10
Improve cycle facilities	33	42	17	21
More pleasant/greener environment	31	27	9	7
Better range of shops	29	22	10	9
Improve shops/better quality shops	25	19	6	4
More leisure facilities	24	23	8	5
Less traffic	24	22	0	9
Reduce pollution	24	19	5	3
Cleaner streets	22	20	5	4
More public spaces/more seating	19	18	5	4
Remove undesirable element/more policing	17	13	0	4
Longer shop opening hours	14	17	4	6
Improve pedestrian environment	13	5	1	1
High street should be pedestrianised	12	8	3	1
More/easier parking	9	9	2	3
Better bus service	9	6	1	1
More shops	6	9	16	3
Improve access to bus stop locations	2	3	0	1
Other	4	2	3	2
Don't know	1	2	1	2
Base	**355**	**374**	**355**	**374**

'Improve cycle facilities' was the main priority at Oxford Street/Regent Street (36%) and Kingston (29%) and the second most important priority at and Enfield Town (23%), Lewisham (16%) and Woolwich (10%).

'Better range of shops' was the main priority at Enfield Town (27%) and Woolwich (28%).

'Less traffic' was the main improvement mentioned at Lewisham (19%). At Walthamstow the main improvement mentioned was 'more pleasant/greener environment' (32%).

At Wimbledon the main improvement was 'more public spaces/more seating' (18%).

Safety

The perceived safety of the town centre neighbourhood in day time and at night was explored. Overall, 67% of cyclists felt very safe (68% in 2104) and 30% felt fairly safe during the day (28% in 2014).

Five per cent of cyclists didn't go out during the evening/after dark in the town centre neighbourhood (10% in 2014). Of those who did, the feeling of safety fell markedly with 38% saying they felt very safe and 37% fairly safe (37% and 42% respectively in 2014).

A positive balance of 1% of cyclists had seen more uniformed police officers in the local neighbourhood in the past year: 13% more, 12% less. In 2104 there was a much larger positive balance of +19%.

In 2105 over three quarters (84%) of cyclists felt very or fairly safe when cycling in the town centre neighbourhood. Two per cent felt very unsafe.

Table 39: Feeling of safety of when cycling in the neighbourhood: 2015 v 2014

	2015 %	2014 %
Very safe	43	40
Fairly safe	41	43
A bit unsafe	13	13
Very unsafe	2	4
Base	**353**	**374**

In 2015 cyclists in Lewisham were most likely to feel unsafe (28% a bit or very unsafe).

Cyclists in Kingston and Woolwich were least likely to feel unsafe (6% and 11% respectively compared to between 14% and 28% elsewhere).

Table 40: Feeling of safety of when cycling in the neighbourhood by town centre 2015

	Enfield Town %	Kingston %	Lewisham %	Oxford Street/ Regent Street %	Walthamstow %	Wimbledon %	Woolwich %
Very safe	24	66	39	71	28	24	47
Fairly safe	62	27	33	17	53	58	43
A bit unsafe	12	3	24	10	17	18	11
Very unsafe	2	3	4	2	2	0	0
Base	**50**	**62**	**49**	**48**	**47**	**50**	**47**

In 2104 cyclists in Oxford Street/Regent Street were most likely to feel unsafe (31% a bit or very unsafe).

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

Table 41: Feeling of safety of when cycling in the neighbourhood by town centre 2014

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

Pedestrian Information Signs

The use and attitudes towards pedestrian information signs were probed. Overall, 9% had used pedestrian information signs in the area on the day of interview (12% in 2014) with the proportion highest in Wimbledon (16%), Lewisham (14%) and Woolwich (11%).

The signs were perceived as easy to use with 97% (86% in 2014) saying they were very easy or easy to use:

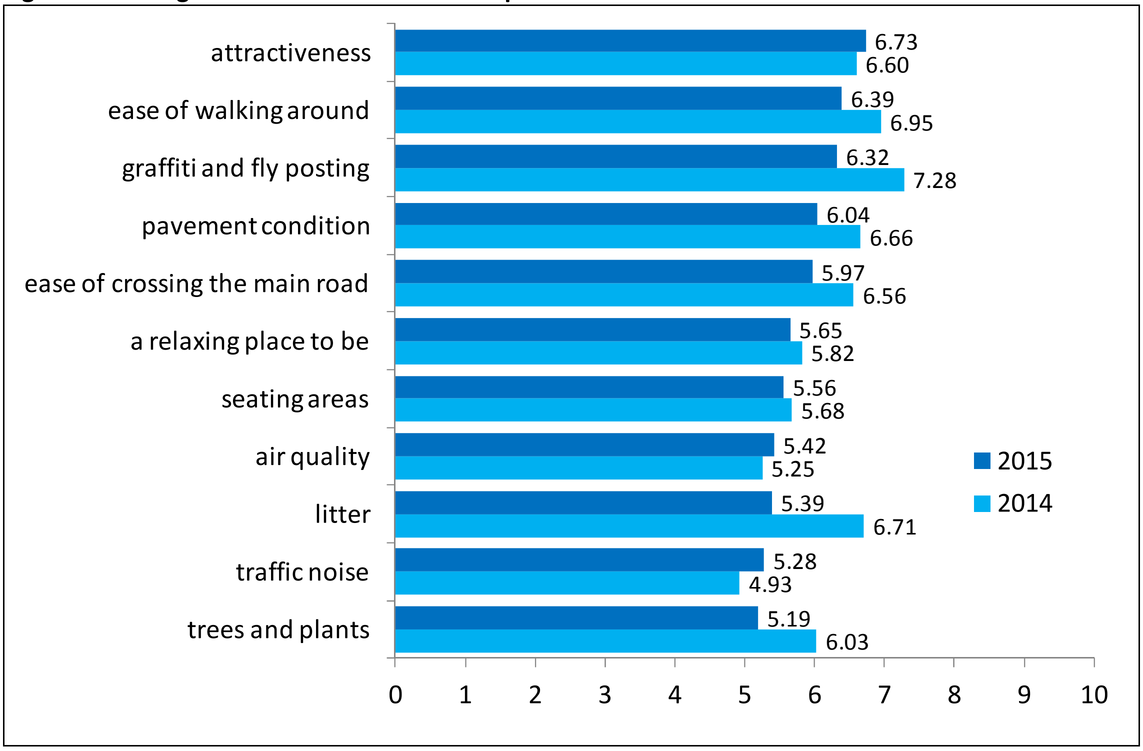
	2015	2014
• very easy	70%	62%
• easy	27%	24%
• neither easy nor difficult	3%	9%
• difficult	0%	4%

Almost all who used the signs (91% in 2105 and 92% in 2014) said they were helpful.

Urban Realm

The best rated aspects for cyclists in 2105 were 'attractiveness', 'ease of walking around' and 'graffiti and fly posting'. In 2014 'graffiti and fly posting' 'graffiti and fly posting' followed by 'ease of walking around' and 'litter'.

Figure 60: Ratings of different urban realm aspects: 2015 v 2014 –mean scores



Base: 355 in 2015, 374 in 2014

4.8 Use of Other Shopping Centres

Over half of cyclist town centre visitors (62% in 2015, 54% in 2014) go to other shopping centres in and around London. The most visited other shopping centres[22] in both 2015 and 2014 were Westfield Stratford and Westfield White City.

Table 42: Whether go to shopping centres in and around London: 2015 v 2014

	2015 %	2014 %
No	38	46
Westfield Stratford	31	32
Westfield White City	27	25
Brent Cross	19	10
Bluewater	18	8
Canary Wharf	13	5
Croydon	12	2
Elephant & Castle	9	1
Lakeside	6	8
Victoria Place	6	1
Aylesham Shopping Centre	3	*
Whiteleys	2	1
Base		**374**

22 From a list shown to respondents

4.9 Oxford Street/Regent Street

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

Why visit Oxford Street

The main reasons why cyclists at Oxford Street were visiting Oxford Street rather than going somewhere else was because of its shopping facilities (50% 'more/better/bigger range of shops' and 46% 'visiting a particular shop') and because they worked near there (29%).

Table 43: Why visiting Oxford Street area today rather than going somewhere else: 2015 v 2014

	2015 %	2014 %
More/better/bigger range of shops	50	18
Visiting a particular shop	46	22
Work near here	29	29
Oxford Street is best shopping area	10	39
Had to be in central London for other reason	6	0
More leisure facilities, eg restaurants, bars, cinemas etc	4	12
Visiting a particular leisure facility	4	10
Easy for me to travel to and from	2	14
Visiting other places in London as well	4	6
Live near here	4	6
As a `day out`/`trip into town`	2	10
Longer shop opening hours	2	4
To do something different/special	2	4
Meeting people here	0	4
Good public transport	0	2
Other	0	2
Base	**48**	**53**

Awareness of changes to travel around Tottenham Court Road

In 2015 79% of cyclists at Oxford Street were aware of the changes to travel around Tottenham Court Road (45% in 2015).

Awareness for reasons for diversions and travel changes

Of those who were aware of the changes to travel around Tottenham Court Road 32% knew it was because of building rail/Crossrail station (36% in 2014).

Other reasons mentioned included:

	2015	2014
• Improving Underground station	66%	14%
• Transport works (unspecified)	16%	14%
• Building works (unspecified)	5%	23%
• Improving road layout/better roads	5%	9%
• Utility works (eg electricity, gas, water)	3%	23%

- Improving bus facilities/bus routes 0% 18%
- Improving pavements/pedestrian facilities 0% 9%
- Improving cycle facilities 0% 5%

Diagonal Crossing

Only 25% of cyclists at Oxford Street/Regent Street had used the diagonal crossing at Oxford Circus (73% in 2014).

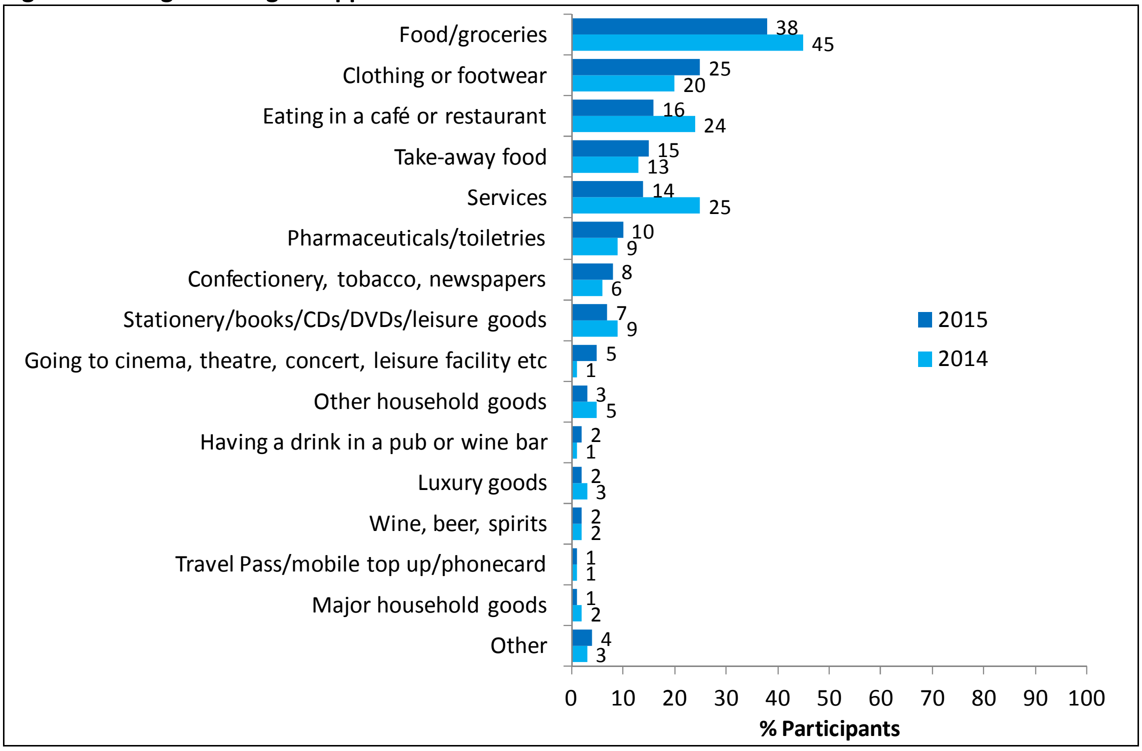
There were relatively high levels of satisfaction with both the safety and ease of crossing the road on the diagonal crossing, although much lower than in 2014. The means scores (where 0 = very dissatisfied and 10 = very satisfied) were:

	2015	2014
• The ease of crossing the road	6.2	7.7
• The safety of crossing the road	6.0	7.7

4.10 Shopping and Expenditure in the Area

A wide range of services and shops were visited by respondents. Thirty eight per cent of the cyclists visiting the town centres were shopping for groceries and food (45% in 2014). A quarter were shopping for clothes or footwear (20% in 2014) as shown in Figure 61.

Figure 61: Range of things shopped for and services used



Base: 355 in 2015, 374 in 2014

Food/grocery shopping was most mentioned at Lewisham (57%), Walthamstow (52%), Woolwich (43%), Kingston (40%) and Wimbledon (38%).

Clothing or footwear shopping was most mentioned at Oxford Street/Regent Street (53%).

Eating out was most mentioned at Enfield Town (34%).

4.11 Average Spend

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

Overall the average spend was £29 on the day of interview (£32 in 2014) which was higher than the usual spend per visit (£27). The average spend per week was £55 (in both 2015 and 2014) and the average spend per month was £218 in 2015 and £220 in 2014.

The £218 average monthly spend was less than the £259 for the non booster cycle sample although the disparity was much less than that for 2014: £220 compared to £300.

	2015	**2014**
• Average spend on the day of interview	£29	£32
• Usual spend per visit	£27	£27
• Average spend per week	£55	£55
• Average spend per month	£218	£220

In 2015, Kingston (£38), Wimbledon (£36) and Oxford Street/Regent Street (£33) were the town centres with the highest levels of spend on the day of interview. Visitors to Lewisham (£20) spent the least.

Those visiting Woolwich (£75), Wimbledon (£73) and Walthamstow (£68) spend the most on average per week. Those visiting Lewisham (£35) spent least on average per week.

In 2014, Oxford Street/Regent Street (£54), Kingston (£28) and Richmond (£28) were the town centres with the highest levels of spend on the day of interview. Visitors to Walthamstow (£19) and Uxbridge (£21) spent the least.

Those visiting Enfield Town and Barking spend the most on average per week (£76 and £64 respectively). Those visiting Richmond (£37) spent least on average per week.

4.12 Online Shopping

Seventy one per cent of cyclists visiting the town centres shop by internet (60% in 2014).

The highest levels of internet shopping were by visitors to Oxford Street/Regent Street (85% in 2015, 71% in 2014) and the lowest by visitors to Enfield Town (52%).

The main goods purchased online are:

	2015	2014
• Clothing or footwear	66%	69%
• Books/CDs/DVDs/leisure goods	57%	61%
• Tickets	43%	36%
• Food/groceries	29%	37%
• Other household goods	29%	18%
• Major household goods	22%	25%
• Take-away food	20%	19%
• Luxury goods	16%	28%
• Wine, beer, spirits	11%	16%

Awareness and impact of improvements

In the 2015 survey a set of questions was added on whether participants had noticed improvements in the past year to:

- pedestrian facilities in the town centre area
- cyclist facilities in the town centre area
- the urban realm/landscape in the town

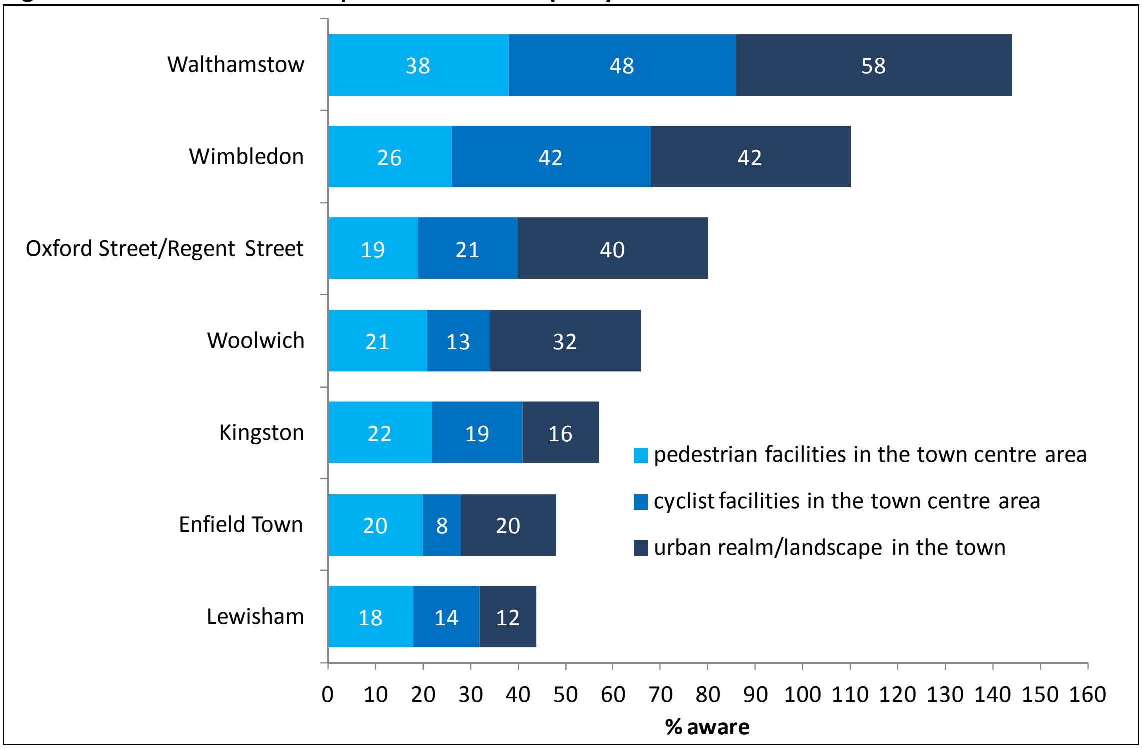
Overall, 23% had noticed improvements to pedestrian facilities and to cycle facilities and 31% to the urban realm/landscape.

Improvements to pedestrian facilities were most noted in Walthamstow (38% of visitors there) and Wimbledon (26%).

Improvements to cyclist facilities were most noted in Walthamstow (48%) and Wimbledon (42%).

Urban realm/landscape improvements were again most noted in Walthamstow (58%) and Wimbledon (42%).

Figure 62: Whether noticed improvements in the past year to….



Weighted base: Enfield Town 50, Kingston 63, Lewisham 49, Oxford Street/Regent Street 48, Walthamstow 48, Wimbledon 50, Woolwich 47

Those who had noticed improvements were asked if these improvements had encouraged them to walk (if pedestrian improvements), cycle (if cyclist improvements) or visit and walk (if urban realm/landscape improvements).

For those who had noticed improvements in the past year to the pedestrian facilities in the town centre area, over half (51%) said the walked more in the area as a result. The town centres with the highest proportions saying they walked more were Wimbledon (85%) Enfield Town (70%) and Kingston (64%).

For those who had noticed improvements in the past year to the cyclist facilities in the town centre area, 46% said the cycled more in the area as a result. The town centres with the highest proportions saying they cycled more were Kingston (75%), Lewisham (57%) and Walthamstow (52%).

For those who had noticed improvements in the past year to the urban realm/landscape in the town centre area, 34% said they visited the area more as a result. The town centres with the highest proportions saying they visited more were Kingston (60%), Wimbledon (48%) and Walthamstow (36%).

Fifty one per cent said they walked in the area more as a result. The town centres with the highest proportions saying they walked in the area more were Kingston (70%), Wimbledon (57%) and Walthamstow (54%).

4.13 Respondent Characteristics

Gender

About two thirds of cyclists visiting the town centres were male: 64% in 2015, 66% in 2014. In Kingston 54% were male.

Age

Forty three per cent of the cycle sample was aged under 34 years old.

Table 44: Age: 2015 v 2014

	2015 %	2014 %
16-24	12	15
25-34	31	23
35-44	26	21
45-54	19	18
55-59	4	9
60-64	3	7
65-74	3	4
75 or over	1	3
Base	**355**	**372**

Ethnicity

In 2015 72% of the cycle sample is from a White background and 16% from a Black background.

Table 45: Ethnicity: 2015 v 2014

	2015 %	2014 %
White	72	77
Asian or Asian British	7	9
Black or Black British	16	9
Mixed	2	3
Chinese or other ethnic background	2	1
Base	**355**	**362**

Employment status

In 2105 77% of the cycle sample was employed, either full time (64%), or part time (13%). Eight per cent were students.

Table 46: Employment Status: 2015 v 2014

	2015 %	2014 %
Working full time (30+ hours a week)	64	54
Working part time (l<30 hours a week)	13	16
A full time student	7	10
A part time student	1	1
Not working, but looking for work	5	5
Not working and not looking for work	1	3
Retired	6	10
Looking after family and home	1	1
Other	1	*
Base	**355**	**372**

* = less than 0.5%

Household Income

Two thirds of the sample (64% in 2014) said they were the chief income earner of the household.

Annual household income was probed. Half either refused to answer or said they did not know.

There was a fairly high income distribution.

Table 47: Gross annual household income before deductions: 2015 v 2014

	2015 %	2014 %
Under £5,000	1	3
£5,000-£9,999	1	2
£10,000-£14,999	1	6
£15,000-£19,999	6	6
£20,000-£24,999	11	7
£25,000-£34,999	8	10
£35,000-£49,999	10	9
£50,000-£74,999	7	8
£75,000-£99,999	3	4
£100,000 or over	2	4
Don't know	49	34
Refused	1	6
base	**355**	**371**

Household Size

The median household size was two, representing 26% of households in 2015 (35% in 2014). Sixteen per cent of participants lived alone.

Table 48: Number of people in household: 2015 v 2014

	2015 %	2014 %
One	16	20
Two	26	35
Three	25	19
Four	24	16
Five	6	5
Six or more	2	4
Refused	0	1
base	**355**	**371**

Access to a Car

Forty five pre cent of the cycle sample (51% in 2014) said they had access to a car that they could have used to travel to the town centre.

Physical and Mental Impairments

Three per cent of the cycle sample in both 2015 and 2014 had a long-term physical or mental disability which limits daily activities or work they could do.

Whether carrying anything

Three quarters (62% in 2014) of cyclist town centre visitors were carrying something as shown in Table 49.

Table 49: Whether respondent carrying anything: 2015 v 2014

	2015 %	2014 %
Nothing	25	38
Suitcase/rucksack	34	31
Shopping bag(s)/shopping trolley	31	34
Other large/awkward object	12	1
Base	**355**	**372**

5. MINI HOLLAND BOROUGHS

5.1 Introduction

In 2014, Transport for London announced £100m of funding for the Mini-Hollands programme. The programme aims to transform three outer London boroughs (Enfield, Kingston and Waltham Forest) so that they have Dutch levels of cycle-friendliness. Each Mini-Holland borough has its own package of infrastructure schemes and supporting measures to create a step change in the number of people cycling.

Three of the town centres, covered in this research, were chosen as they are part of the Mini-Holland programmes being rolled in the London Boroughs of Enfield, Kingston and Waltham Forest.

A summary of the key initiatives in each of the boroughs is given below:

- **Kingston** – A major cycle hub, plaza outside Kingston station will be transformed. New cycling routes including a Thames Riverside Broadway.
- **Enfield** – redesign of Enfield town centre with segregated superhighways, three cycle hubs and greenway routes.
- **Waltham Forest** – A semi-segregated Superhighway route and a range of measures in residential areas creating cycle friendly, low-traffic neighbourhoods.

This chapter provides a comparison of the results for the overall sample of visitors at the three Mini-Hollands town centres (Enfield, Kingston and Walthamstow) with the overall sample of visitors for all Outer London town centres for the 2015 Spring wave. 10 of the 14 town centres were Outer London town centres. This was chosen as a control rather than the initially chosen specific control town centres (ie Woolwich for Walthamstow, Lewisham for Enfield and Wimbledon for Richmond) as there were too many differences between these and the Mini-Hollands town centres.

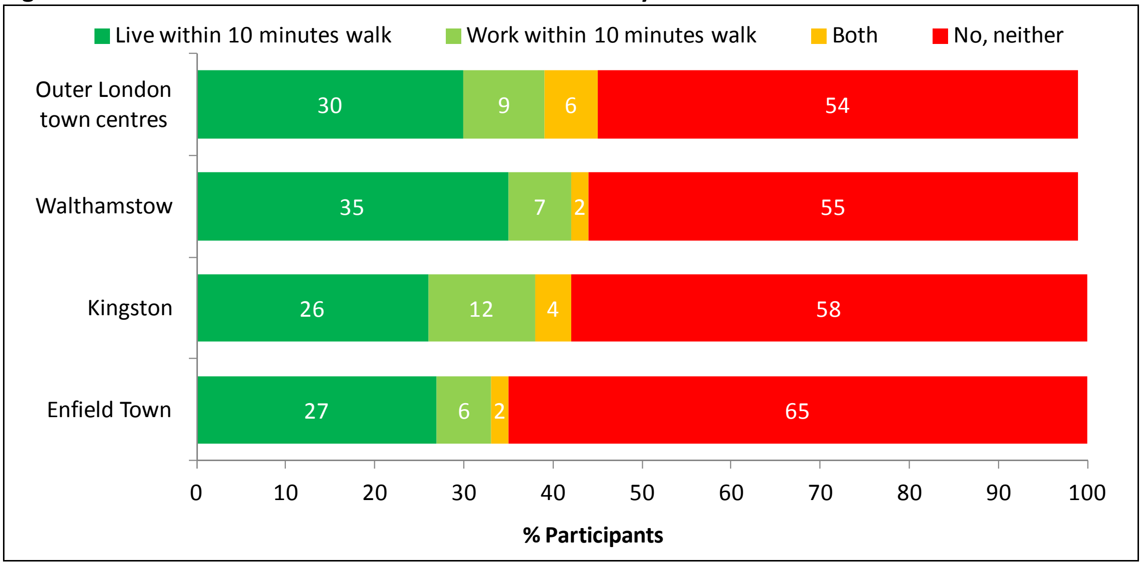
We also highlight the cycle booster results for Enfield, Kingston and Walthamstow from the 2015 Spring wave to bring out the cyclists results in the Mini-Hollands boroughs.

5.2 Purpose of Visit

The town centres are used by both those who live and work in the area and by visitors from outside the area.

The three Mini-Holland town centres, particularly Enfield Town were less likely to have visitors who not live or work more than 10 minutes walk from the town centre than outer London town centres overall.

Figure 63: Whether live or work within 10 minutes walk by Mini-Holland town centres



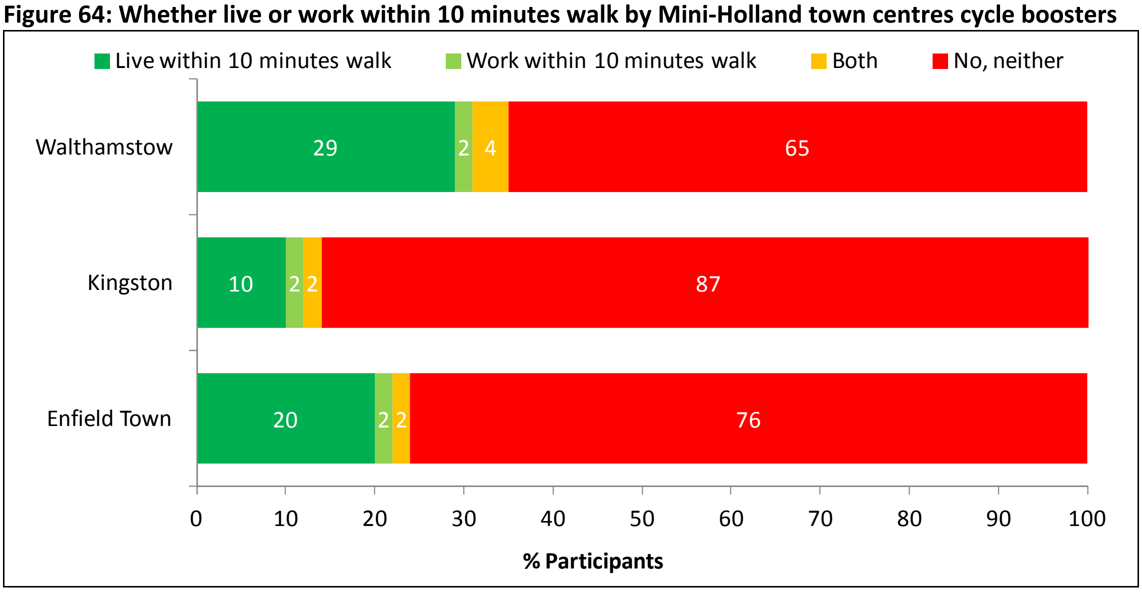
Base: Mini-Holland Boroughs: Enfield Town 316, Kingston 317, Walthamstow 295; Outer London town centres, 1629

Cyclists in each town centre were more likely than other visitors to live or work more than 10 minutes walk from the town centre:

- Kingston: 87% compared to 58%
- Enfield Town: 76% compared to 65%
- Walthamstow: 65% compared to 55%.

Kingston was most likely to attract cyclists from a wider catchment area.

Figure 64: Whether live or work within 10 minutes walk by Mini-Holland town centres cycle boosters



Base: Mini-Holland town centre cycle boosters: Enfield Town 50, Kingston 63, Walthamstow 48

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.

Shopping was the predominant purpose and the main reason for visiting for about six tenths of visitors to Outer London town centres. Much higher proportions at each of the Mini-Holland town centres said shopping was their main purpose: 73% at Kingston and Walthamstow and 65% at Enfield Town.

Eating and drinking out was also important, being mentioned by 24% of visitors to Outer London town centres, but was only the main purpose for 8%. Eating and drinking out was less important at Walthamstow and Enfield Town (4% main purpose) and similarly important at Kingston.

Using a service was particularly important at Enfield Town: 15% main purpose compared to between 7% and 8% elsewhere.

All reasons and the main reasons for visiting the area are as shown in Table 50.

Table 50: Reasons for visiting town centre by Mini-Holland town centres

	Enfield Town		Kingston		Walthamstow		Outer London town centres	
	All %	Main %	All %	Main %	All %	Main %	All %	Main %
Shopping	79	65	82	73	82	73	76	59
Eating/drinking out	19	4	18	8	11	4	24	8
Work here	8	7	7	6	5	4	9	8
Using service	26	15	14	8	13	7	15	7
Visiting friends and relatives	5	4	1	1	1	0	7	4
Using public amenity	3	1	3	1	4	4	6	4
Live here	7	3	4	*	3	*	8	3
Other social/leisure	5	*	0	0	5	3	4	3
Personal business	*	*	0	0	3	2	3	3
General recreation	*	0	0	0	1	*	3	2
Travelling through the area	2	*	0	0	*	*	4	2
Window shopping	1	1	2	0	1	*	2	*
Dropping off/picking up friend/relative	0	0	0	0	*	0	*	*
Delivering goods	*	*	0	0	*	*	*	*
Other	0	0	1	1	0	0	*	*
Base	**316**	**316**	**317**	**317**	**295**	**295**	**1629**	**1629**

* = less than 0.5%

Cyclists were much less likely to be shopping than visitors by other modes although it was still the predominant purpose, particularly in Kingston and Walthamstow, where it was the main purpose for about six tenths.

'Services' was the second most important activity for cyclists in Walthamstow and Enfield Town as it was for the overall sample in those town centres.

In Kingston, 'eating/drinking out' was the second most important activity for cyclists, again similar to the overall sample there.

Table 51: Reasons for visiting town centre by Mini-Holland cycle boosters

	Enfield Town		Kingston		Walthamstow	
	All %	**Main %**	**All %**	**Main %**	**All %**	**Main %**
Shopping	70	50	81	60	69	58
Eating/drinking out	50	10	29	10	6	0
Work here	8	8	3	3	6	2
Using service	18	12	27	6	17	13
Visiting friends and relatives	14	12	8	3	0	0
Using public amenity	6	2	5	2	10	8
Live here	4	2	0	0	2	0
Other social/leisure	0	0	16	8	6	6
Personal business	0	0	0	0	6	6
General recreation	2	2	11	6	6	4
Travelling through the area	0	0	2	2	0	0
Window shopping	0	0	8	0	0	0
Other	2	2	2	0	2	2
Base	**50**	**50**	**63**	**60**	**48**	**48**

5.3 Time Spent in Town Centre

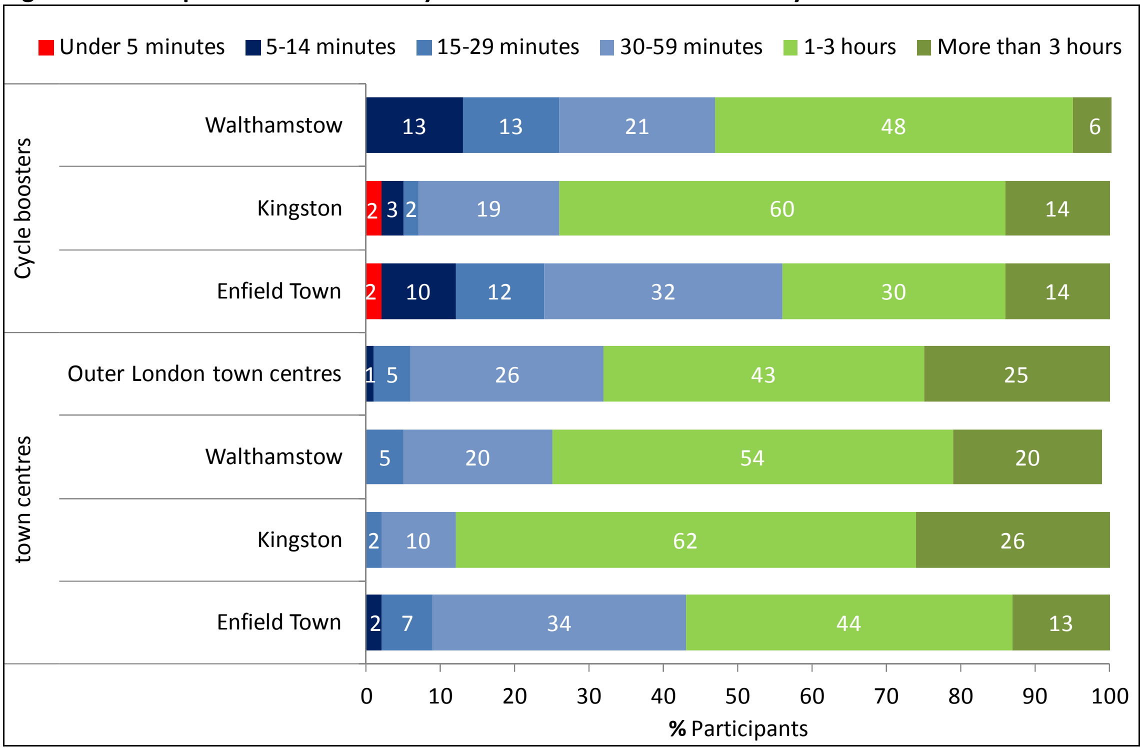
Two thirds of visitors to outer London town centres (67%) said they were planning to spend at least one hour in the town centre with 43% spending between one and three hours. Visitors to Enfield Town spent less time and visitors to Kingston and Walthamstow spent longer than visitors to outer London town centres:

- Kingston: 88% at least one hour
- Walthamstow: 74% at least one hour
- Enfield Town: 57% at least one hour

Cyclists tended to spend less time in the town centre than visitors overall with the longest visits by Kingston cyclists and shortest visits be Enfield Town cyclists (as for the overall samples):

- Kingston: 74% at least one hour
- Walthamstow: 44% at least one hour
- Enfield Town: 44% at least one hour.

Figure 65 Time spent in town centre by Mini-Holland town centre and cycle boosters



Base: Mini-Holland Boroughs: Enfield Town 316, Kingston 317, Walthamstow 295; Outer London town centres, 1629; cycle boosters: Enfield Town 50, Kingston 63, Walthamstow 48

5.4 Frequency of Visiting

The majority visit the town centre on a regular basis with 81% of the outer London town centre sample visiting the area once a week or more often. Walthamstow has more frequent visitors (84% visiting the area once a week or more often) and Enfield Town less frequent visitors (76% visiting the area once a week or more often). Kingston is more or less the same as the overall outer London sample (80%).

Table 52: Frequency of visiting town centre by Mini-Holland town centres

	Enfield Town %	Kingston %	Walthamstow %	Outer London town centres %
5 or more days a week	22	31	29	39
3 or 4 days a week	14	16	22	15
2 days a week	16	14	16	12
Once a week	24	19	17	15
Once a fortnight	10	8	8	6
About once a month	8	5	5	6
Less than once a month	3	5	3	6
First time	3	1	1	1
Base	**316**	**317**	**295**	**1629**

Cyclists in Enfield Town and Walthamstow visit the town centre more often than overall visitors to the town centres, whereas the reverse is the case for Kingston:

- Walthamstow: 89% cyclists compared to 84% overall visits once a week or more
- Enfield Town: 80% cyclists compared to 76% overall visits once a week or more

- Kingston: 68% cyclists compared to 80% overall visits once a week or more.

Table 53: Frequency of visiting town centre by Mini-Holland cycle boosters

	Enfield Town %	Kingston %	Walthamstow %
5 or more days a week	18	6	42
3 or 4 days a week	14	24	15
2 days a week	18	8	17
Once a week	30	30	15
Once a fortnight	12	16	13
About once a month	4	13	0
Less than once a month	4	3	0
First time	0	0	0
Base	**50**	**63**	**48**

5.5 Mode of Transport

Bus was the mode of access used by the highest proportion of visitors to Outer London town centres (36%). Twenty seven per cent walked to the town centre, 13% drove, 11% used the train and 6% used a Tube as shown in Table 54.

Bus use was similar to Outer London town centres in Enfield Town (37%) and Walthamstow (35%) but lower in Kingston (30%).

Walk was much higher in Walthamstow (38%) than elsewhere (22%-28%).

Car use was highest in Kingston (29%) and also high in Enfield Town (19%). At 13% Walthamstow was the same as Outer London town centres overall.

Train was much lower in Walthamstow (4%) than elsewhere (11%-14%) although Tube use was higher (8% compared to less than 0.5% in Enfield Town and none in Kingston).

For the overall samples just 1% in Outer London town centres cycled to the town centre. This was the same proportion as two of the Mini-Holland town centres: Walthamstow and Enfield Town. However, in Kingston 4% of the sample cycled to the town centre.

Table 54: Mode of access to area by Mini-Holland town centres

	Enfield Town %	Kingston %	Walthamstow %	Outer London town centres %
Bus	37	30	35	36
Walked	28	22	38	27
Drove a car/van/lorry	19	29	13	13
Train	11	14	4	12
Tube/Underground	*	0	8	6
Given a lift	1	1	*	3
Bicycle	1	4	1	2
Taxi/minicab	2	0	*	1
Drove a motorbike/moped/scooter	*	*	0	*
Drove a delivery vehicle	*	0	*	*
Tram	0	0	0	*
Other	0	*	1	*
Base	**316**	**317**	**295**	**1629**

* = less than 0.5%

Just under a third (32%) in Outer London town centres who did not walk or cycle said they also walked for five minutes or more as part of their trip to travel to the area that day. This was the same proportion in Kingston bet less than Walthamstow (35%) and Enfield Town (36%). Less than 0.5% said they cycled or cycled and walked.

Nearly half (46%) in Outer London town centres who used bus, train or Tube to access the town centre said they also walked for five minutes. This was a similar proportion to Walthamstow (47%) but higher than Enfield Town (42%) and lower than Kingston (54%). In addition 5% in Kingston said they also cycled for five minutes.

Why Cycle used

For the cycle booster samples, all reasons and the main reason for choosing to travel by cycle to access the area are shown in Table 55.

Table 55: All reasons and main reason for using cycle rather than any other method of transport to access area by Mini-Holland cycle boosters

	Enfield Town		Kingston		Walthamstow	
	All %	Main %	All %	Main %	All %	Main %
Quicker	34	18	59	19	69	38
Need/enjoy exercise/healthy	38	28	46	17	38	19
Cheaper/less expensive	42	22	40	11	48	17
Easier/more convenient	14	2	59	29	42	15
Avoids parking difficulties	28	14	22	6	13	4
More direct	18	2	27	2	27	2
Live very close by	8	4	6	3	21	4
More relaxing/comfortable	0	0	21	8	10	
No car/can`t drive	8	2	10	0	2	2
Going to more than one place	2	2	8	2	4	0
Weather issues	8	0	8	0	0	0
Only method possible	6	4	2	0	0	0
Had heavy bags/shopping to carry	2	2	5	2	0	0
Safer	0	0	10	0	0	0
Other	0	0	5	2	2	0
Base	**50**	**50**	**63**	**60**	**48**	**48**

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

Walthamstow cyclists were most likely to cite speed (69% compared to 59% in Kingston and 34% in Enfield). Need/enjoy the exercise was the second most cited reason overall and los cost third.

The **main** reasons given for cycling in Walthamstow were speed (38%), need/enjoy the exercise (19%), low cost (17%) and ease/convenience (15%).

In Kingston, the **main** reasons given for cycling were ease/convenience (29%), speed (19%), need/enjoy the exercise (17%), and low cost (11%).

In Enfield Town, the **main** reasons given for cycling were need/enjoy the exercise (28%), low cost (22%), speed (18%) and avoiding parking difficulties (14%).

Frequency of cycle use

For the cycle booster samples the frequency of cycling to the area was probed.

The frequency of cycling was highest in Enfield Town and Walthamstow:

- Enfield Town: 78% cycled to the area once a week or more
- Walthamstow: 77% cycled to the area once a week or more
- Kingston: 67%cycled to the area once a week or more

Table 56: Frequency of using cycle to travel to this area by Mini-Holland cycle boosters

	Enfield Town %	Kingston %	Walthamstow %
5 or more days a week	12	5	27
3 or 4 days a week	26	17	10
2 days a week	14	16	23
Once a week	26	29	17
Once a fortnight	10	17	10
About once a month	8	10	4
Less than once a month	4	6	4
Base	**50**	**63**	**48**

5.6 Encouraging Cycling

Non cyclists (ie those who never cycled to the town centre) were shown a screen with the following list of potential improvements and asked which would encourage them to cycle more often in the area. Cyclists were shown a similar list and asked which of them encouraged or influenced their choice to cycle there that day.

Non cyclists

- (More) cycle lanes on the roads
- (More) dedicated cycle paths
- Better cycle routes to / through the town centre
- 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

Cyclists

- Cycle lanes on the roads
- Dedicated cycle paths
- Cycle routes to / through the town centre
- Little road traffic
- Free on-road cycle training
- Bicycle hire scheme
- Bicycle parking facilities in this area
- Bicycle parking facilities at / near your home

Over a third (35%) of non cyclists in Outer London town centres mentioned at least one thing that might encourage them to cycle more often in the area.

The two main improvements for the Outer London town centres sample were ‘more dedicated cycle paths’ (15%) and ‘more cycle lanes on the roads’ (14%).

Overall, 65% in Outer London town centres said nothing would encourage them to cycle.

In Enfield Town the main improvements were ‘more cycle lanes on the roads’ (30% compared to 14% overall) and ‘more dedicated cycle paths’ (23% compared to 15% overall). 53% said nothing would encourage them to cycle (compared to 65% overall).

In Walthamstow the main improvements were also ‘more cycle lanes on the roads’ (27% compared to 14% overall) and ‘more dedicated cycle paths’ (24% compared to

15% overall). 61% said nothing would encourage them to cycle (compared to 65% overall).

The Kingston sample was similar to Outer London town centres.

Table 57: Things which would encourage cycling more often in this area by Mini-Holland town centres

	Enfield Town %	Kingston %	Walthamstow %	Outer London town centres %
(More) dedicated cycle paths	23	16	24	15
(More) cycle lanes on the roads	30	16	27	14
Less road traffic	15	10	14	7
Better cycle routes to / through the town centre	11	6	10	7
Bicycle hire scheme	2	2	5	5
(Better) bicycle parking facilities in this area	2	2	5	5
(Better) bicycle parking facilities at / near your home	2	1	3	4
Free on-road cycle training	11	1	8	2
None of these / nothing	53	71	61	65
Don't know	7	1	1	8
Base	**309**	**287**	**286**	**1,582**

The cycle booster sample was asked which improvements would encourage them to cycle more. Table 58 shows the 2015 data by location. Key findings are:

- 'Dedicated cycle paths' and Cycle lanes on the roads' were mentioned most often in Walthamstow (53% each)
- 'Cycle routes to / through the town centre' was mentioned most often in Walthamstow (34%) and Enfield Town (30%)
- 'Little road traffic' was mentioned most often in Walthamstow (32%).
- 'Bicycle parking facilities in this area' was mentioned most often in Kingston (34%).
- 'Free on-road cycle training' was mentioned by 17% in Walthamstow.

Table 58: Things that encouraged / influenced their choice to cycle there that day by Mini-Holland cycle boosters

	Enfield Town %	Kingston %	Walthamstow %
Dedicated cycle paths	18	34	53
Cycle lanes on the roads	20	26	53
Cycle routes to / through the town centre	30	16	34
Little road traffic	8	16	32
Bicycle parking facilities in this area	8	34	13
Bicycle parking facilities at/near your home	4	11	15
Free on-road cycle training	2	11	17
Bicycle hire scheme	2	2	6
None of these / nothing	34	39	23
Don't know	2	0	6
Base	**50**	**62**	**47**

Participants were then shown the same list of potential improvements and asked which would make them feel safer cycling in the area.

Over a third (33%) of Outer London town centre visitors mentioned at least one thing that would make them feel safer cycling in the area.

The responses were very similar to those about encouraging cycling. The three main improvements were the same: ‘more dedicated cycle paths’ (23%), ‘more cycle lanes on the roads’ (22%), and ‘less road traffic’ (12%).

Overall, 67% said nothing would make them feel safer cycling in the area. There were few differences between the three Mini-Holland town centres.

Table 59: Which of these would make you feel safer cycling in this area by Mini-Holland town centres

	Enfield Town %	Kingston %	Walthamstow %	Outer London town centres %
(More) dedicated cycle paths	22	25	23	23
(More) cycle lanes on the roads	28	24	24	22
Less road traffic	17	13	16	12
Bicycle hire scheme	1	2	6	6
(Better) bicycle parking facilities in this area	*	3	6	6
Free on-road cycle training	5	4	7	5
(Better) bicycle parking facilities at / near your home	0	1	2	4
None of these / nothing	51	63	60	67
Base	**316**	**317**	**295**	**1,629**

* = less than 0.5%

The cycle booster sample was shown the same list of potential improvements and asked which would make them feel safer cycling in the area.

As for the non cyclists, the main things which would make them feel safer were ‘more dedicated cycle paths’, ‘more cycle lanes on the roads’ and ‘less road traffic’. The ordering for these three was the same in the three areas although there were many more responses in Walthamstow and Kingston than in Enfield Town.

Table 60: Things which would make you feel safer cycling in this area by Mini-Holland cycle boosters

	Enfield Town %	Kingston %	Walthamstow %
(More) dedicated cycle paths	46	68	81
(More) cycle lanes on the roads	40	63	67
Less road traffic	24	30	46
(Better) bicycle parking facilities in this area	4	17	29
Bicycle hire scheme	0	3	19
Free on-road cycle training	4	8	23
(Better) bicycle parking facilities at / near your home	8	6	21
None of these / nothing	24	5	6
Base	**50**	**62**	**47**

5.7 Attitudes towards Town Centres

Improvements to Town Centre

Visitors to outer London town centres were asked in what way the area could be improved. The suggestions most often mentioned were ‘cleaner streets’ (30%), ‘better range of shops’ and ‘more pleasant/greener environment’ (26% each) and ‘improve shops/better quality shops’ (23%).

Fourteen per cent of outer London town centres visitors thought that there was nothing that could be done to improve the centres.

When asked what was the single most important improvement to be made, ‘better range of shops’, ‘more pleasant/greener environment’ and ‘remove undesirable element/more policing’ were seen as the main priorities with 10% each as shown in Table 61.

In Enfield Town the main priorities were:

- More pleasant/greener environment (19%)
- More public spaces / more seating (11%)
- Cleaner streets (9%)

In Kingston the main priorities were:

- More pleasant/greener environment (13%)
- Cleaner streets (6%)
- More leisure facilities (6%)
- Longer shop opening hours (6%)

In Walthamstow the main priorities were:

- Better range of shops (24%)
- Improve shops/better quality shops (11%)
- More pleasant/greener environment (9%)
- Remove undesirable element/more policing (9%)

Table 61: Priorities for improvements to the area by Mini-Holland town centres

	Enfield Town		Kingston		Walthamstow		Outer London town centres	
	All %	Most import-ant %	All %	Most import-ant %	All %	Most import-ant %	All %	Most import-ant %
Nothing	14	14	32	32	11	11	14	14
Better range of shops	24	11	7	5	50	24	26	10
More pleasant/greener environment	34	14	19	13	27	9	26	10
Remove undesirable element/more policing	7	2	4	3	17	9	18	10
Cleaner streets	14	5	9	6	16	7	30	9
Improve shops/better quality shops	18	8	2	1	36	11	23	9
More leisure facilities e.g. restaurants, bars, cinemas etc	19	8	8	6	15	5	16	6
More public spaces / more seating	22	9	11	4	18	4	19	5
More/easier parking	13	3	6	4	8	2	9	5
Less traffic / lower speed limits	17	5	7	3	8	2	13	3
Longer shop opening hours	10	4	8	6	15	1	11	3
Reduce pollution	14	3	3	1	10	2	14	2
Better bus service	7	2	2	1	4	1	10	2
Improve pedestrian environment	9	1	4	2	6	1	9	2
High street should be pedestrianised	3	*	5	3	2	1	8	2
More shops	11	4	5	4	16	2	7	1
Improve cycle facilities	3	1	4	2	3	1	4	1
Improve access to bus stop locations	3	0	1	*	1	0	4	*
Other	6	5	5	5	5	5	5	5
Base	**316**	**316**	**317**	**317**	**295**	**295**	**1629**	**1629**

* = less than 0.5%

The cycle booster sample was asked in what way the area could be improved. The suggestion most often mentioned was 'improve cycle facilities' (mentioned most in Kingston (44%) and Walthamstow (38%) and least in Enfield Town (20%).

Other important improvements were 'better range of shops', 'more pleasant/greener environment' and 'more leisure facilities'.

Table 62: Priorities for improvements to the area by Mini-Holland cycle boosters

	Enfield Town		Kingston		Walthamstow	
	All %	Most import-ant %	All %	Most import-ant %	All %	Most import-ant %
Nothing	14	14	11	11	10	10
Improve cycle facilities	20	16	44	22	38	13
Better range of shops	26	20	13	6	42	8
More pleasant/greener environment	18	6	33	6	25	21
More leisure facilities	14	6	24	17	25	6
Reduce pollution	20	2	29	6	29	2
Less traffic / lower speed limits	16	10	30	3	15	0
Longer shop opening hours	26	12	3	2	23	8
Improve shops / better quality shops	18	4	13	3	27	4
Remove undesirable element/more policing	2	0	8	2	35	15
Cleaner streets	12	2	17	5	19	0
More public spaces / more seating	6	4	17	6	17	2
More/easier parking	6	0	17	2	4	2
Improve pedestrian environment	8	0	14	2	4	0
Better bus service	0	0	17	3	4	0
High street should be pedestrianised	4	0	5	0	6	0
More shops	6	4	0	0	4	0
Improve access to bus stop locations	0	0	3	0	4	0
Other	2	0	5	3	6	6
Don't know	0	0	0	0	2	2
Base	**50**	**50**	**63**	**60**	**48**	**48**

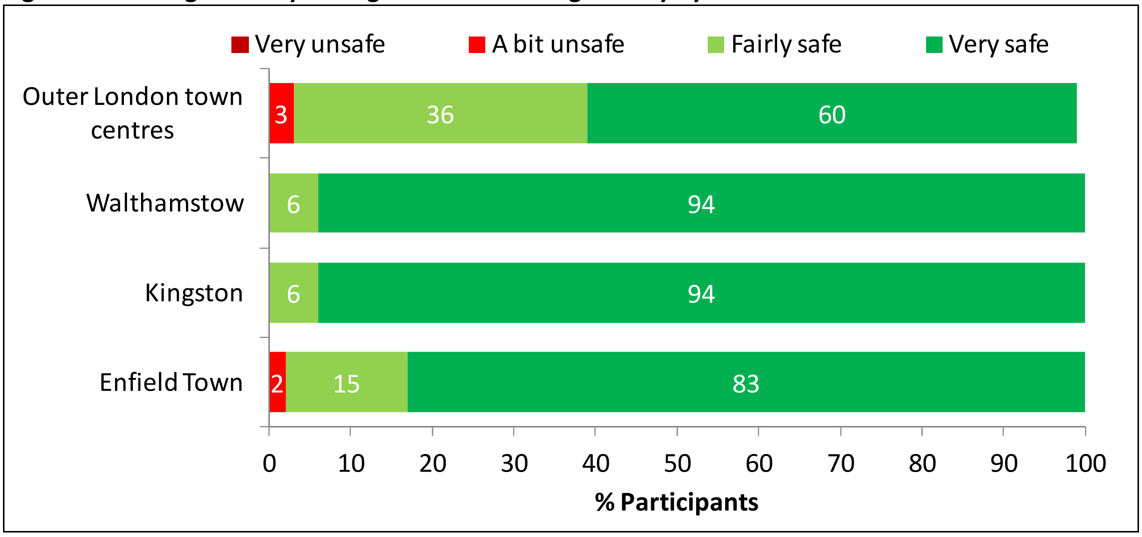
* = less than 0.5%

Safety

The perceived safety of the town centre neighbourhood in day time and at night was explored.

In outer London town centres, 60% of town centre visitors felt very safe and 36% felt fairly safe during the day. In all three Mini-Holland town centres the feeling of safety was much higher, particularly in Kingston and Walthamstow where 94% felt very safe.

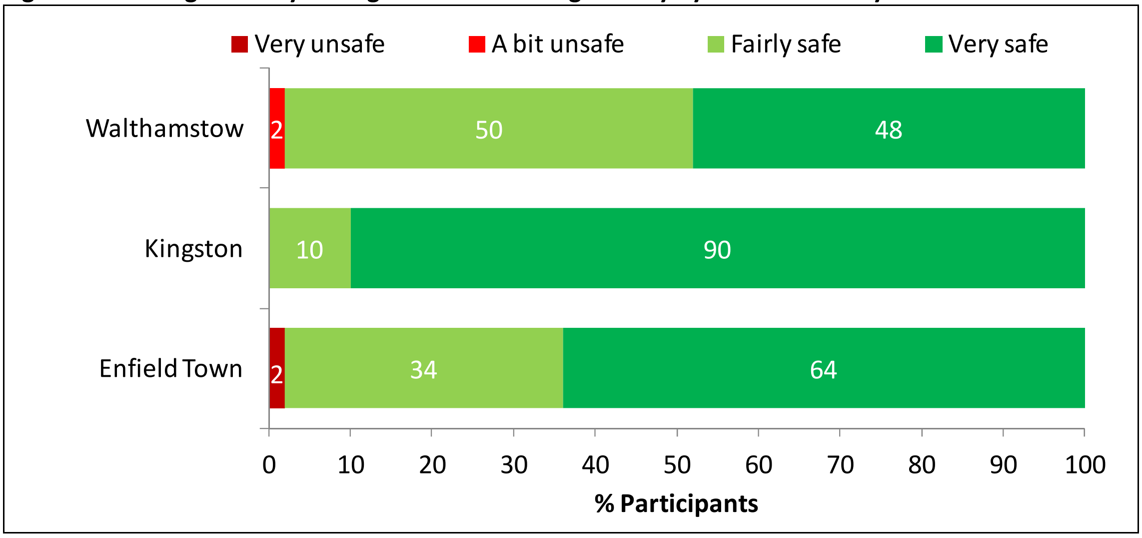
Figure 66: Feeling of safety in neighbourhood during the day by Mini-Holland town centres



Base: Mini-Holland Boroughs: Enfield Town 316, Kingston 317, Walthamstow 295; Outer London town centres, 1629

For the cycle booster sample, the feeling of safety was lower than for overall Mini-Holland town centre visitor samples.

Figure 67: Feeling of safety in neighbourhood during the day by Mini-Holland cycle boosters



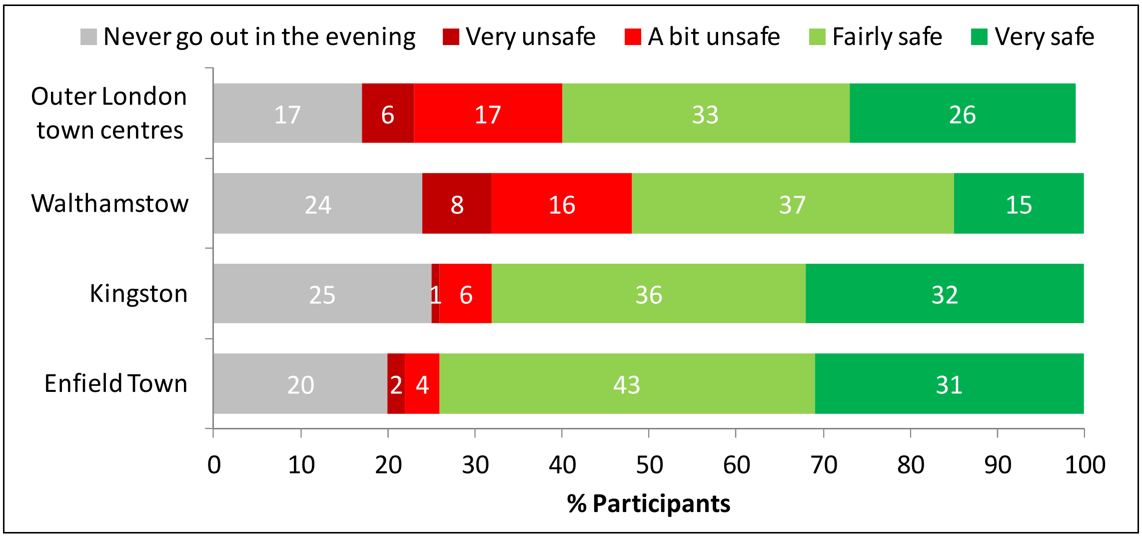
Base: Mini-Holland town centre cycle boosters: Enfield Town 50, Kingston 63, Walthamstow 48

Under a fifth (17%) of outer London town centre visitors didn't go out during the evening/after dark in the town centre neighbourhood.

The feeling of safety fell markedly compared to the day time with only 26% saying they felt very safe and 33% fairly safe.

The feeling of safety in two of the three Mini-Holland town centres (Kingston and Walthamstow) was higher but lower in the other one (Enfield Town). See Figure 68.

Figure 68: Feeling of safety in neighbourhood during the evening/after dark by Mini-Holland town centres

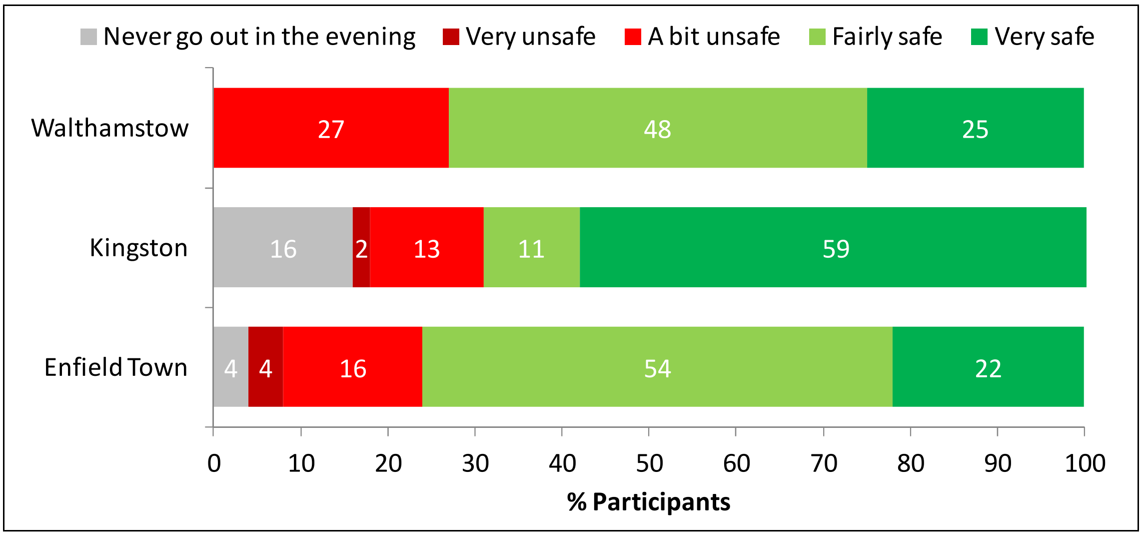


Base: Mini-Holland Boroughs: Enfield Town 316, Kingston 317, Walthamstow 295; Outer London town centres, 1629

Sixteen per cent of the Kingston cycle booster sample didn't go out during the evening/after dark in the town centre neighbourhood. Of those who did, the feeling of safety was relatively high with 59% saying they felt very safe and 11% fairly safe.

At Enfield Town only 4% of the cycle booster sample didn't go out during the evening/after dark and at Walthamstow all went out during the evening/after dark. Similar proportions in both Enfield Town and Walthamstow felt safe. See Figure 69.

Figure 69: Feeling of safety in neighbourhood during the evening/after dark by Mini-Holland cycle boosters

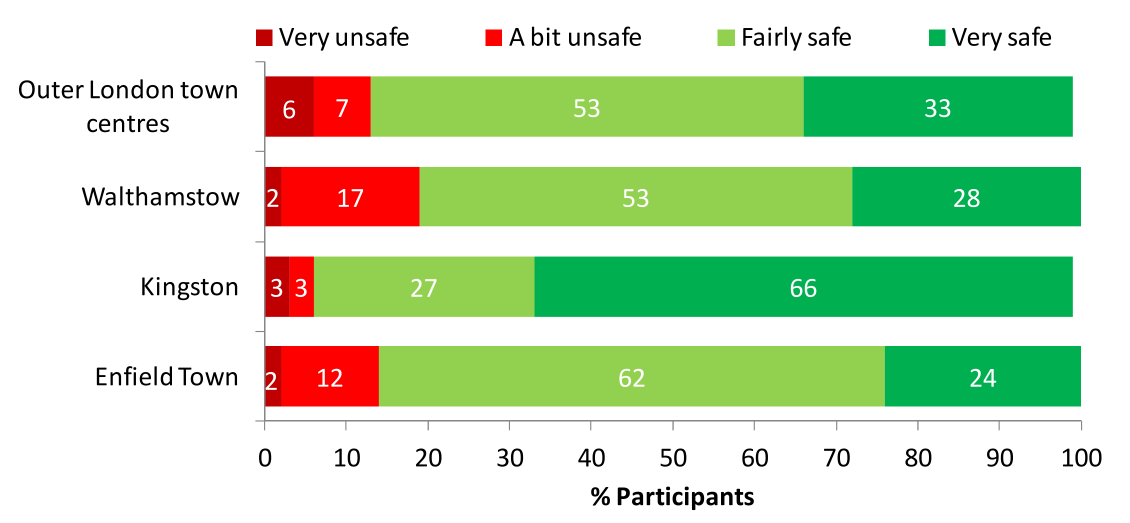


Base: Mini-Holland town centre cycle boosters: Enfield Town 50, Kingston 63, Walthamstow 48

Nearly nine tenths (88%) of cyclists outer London town centres felt safe when cycling in the neighbourhood and 6% felt very unsafe.

Cyclists in Kingston were least likely to feel unsafe (6% compared to 14% in Enfield Town, 19% in Walthamstow and 13% for Cyclists in all outer London town centres).

Figure 70: Feeling of safety of when cycling in the neighbourhood by Mini-Holland cycle boosters



Base: Mini-Holland town centre cycle boosters: Enfield Town 50, Kingston 63, Walthamstow 48; Outer London town centres cyclists 67

Urban Realm

Many of the outer London town centres in this study are covered by the major schemes programme (including Mini-Hollands works). For some these the schemes have finished, for others it has started and for others it is yet to start.

To allow for the impact of the schemes to be measured with respect to changes to the urban realm the survey included a set of ratings questions. These were designed to understand how users of the town centres perceive the town centre with respect to the following:

- attractiveness
- traffic noise
- a relaxing place to be
- ease of crossing the main road
- air quality
- ease of walking around
- graffiti and fly posting
- litter
- pavement condition
- seating areas
- trees and plants
- ease of cycling[23].

[23] Added in 2015

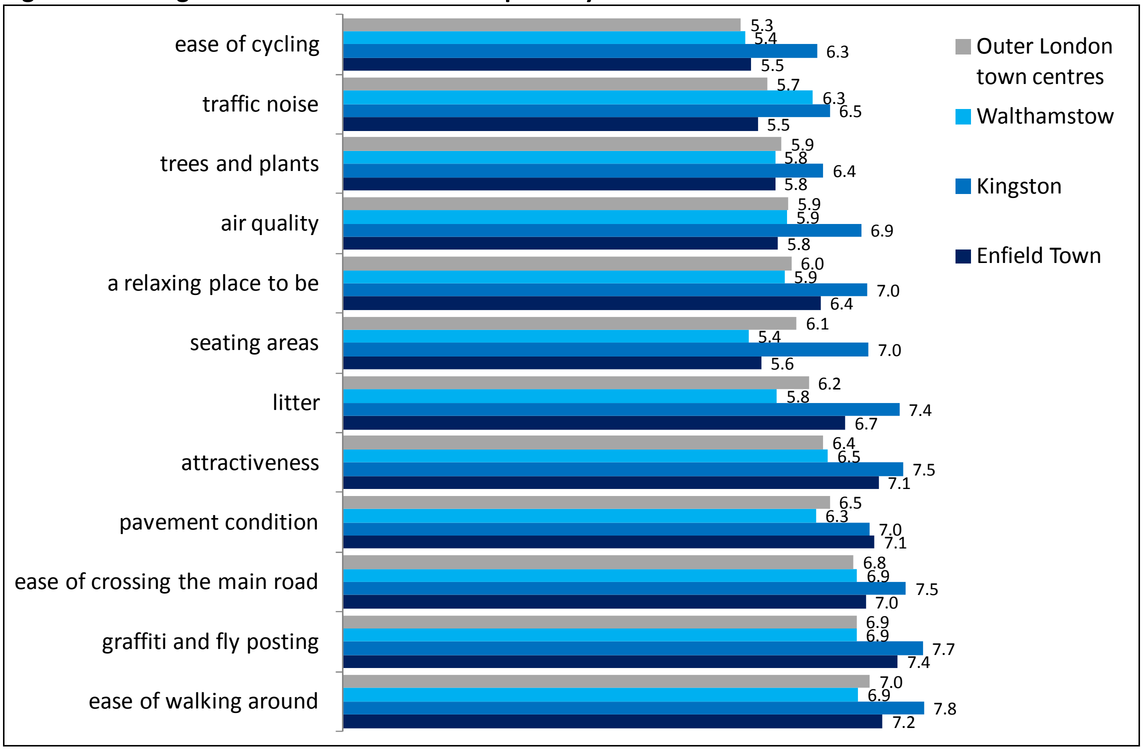
Each of these was rated on a scale from 0 to 10 with the following labels for each end of the scale:

0		10
very unattractive	**Attractiveness**	very attractive
very noisy	**Traffic noise**	very quiet
very stressful	**A relaxing place to be**	very relaxing
very difficult	**Ease of crossing the main road**	very easy
very poor	**Air quality**	very good
very difficult	**Ease of walking around**	very easy
significant graffiti/fly posting	**Graffiti and fly posting**	no graffiti/fly posting
significant litter	**Litter**	no litter
cracked and uneven	**Pavement condition**	no cracks and even
no seating areas	**Seating areas**	some seating areas
no trees and plants	**Trees and plants**	some trees and plants
very difficult	**Ease of cycling**	very easy

The best rated aspects for outer London Town Centres overall were 'ease of walking around' and 'graffiti and fly posting'. The worst rated aspects were 'ease of cycling', 'traffic noise' and 'trees and plants'. See Figure 71 for the mean scores for outer London Town Centres compared to the three Mini-Holland town centres.

Kingston had the best rating overall and for every aspect (in fact it had the best ratings for all the town centres in the study). Enfield Town had better rating scores than Walthamstow for every aspect except 'traffic noise', 'air quality' and 'trees and plants'.

Figure 71: Ratings of different urban realm aspects by Mini-Holland town centres – mean scores



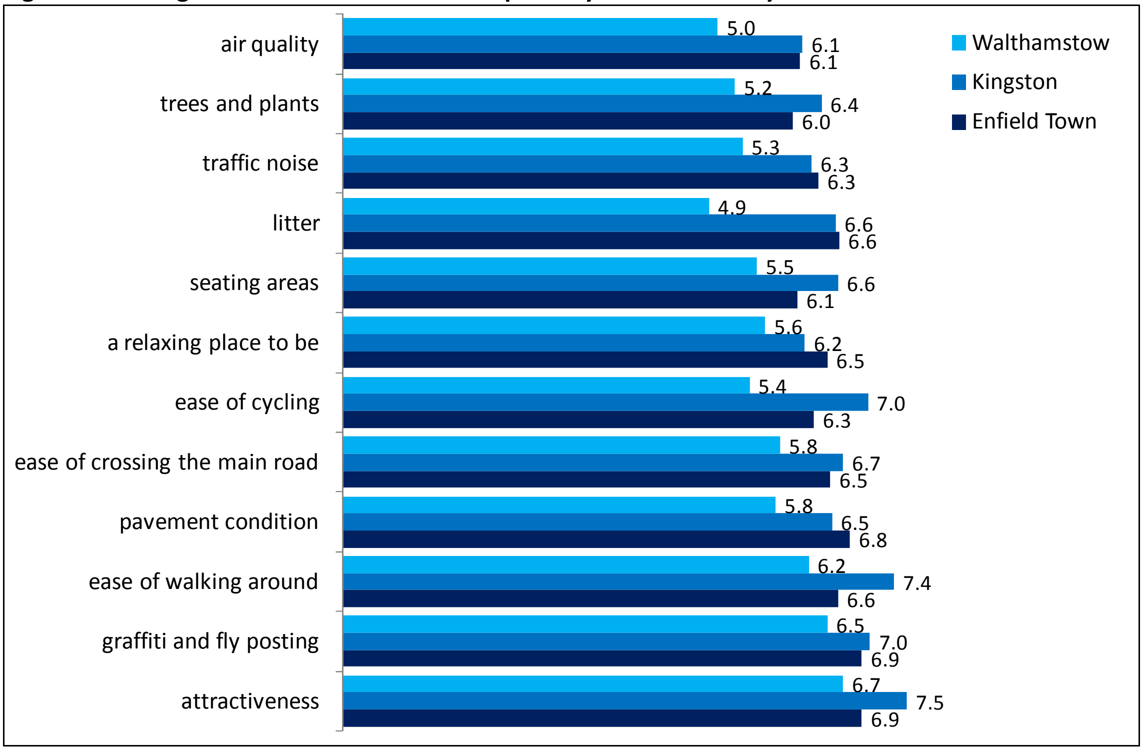
Base: Mini-Holland Boroughs: Enfield Town 316, Kingston 317, Walthamstow 295; Outer London town centres, 1629

For the cycle booster samples 'attractiveness' was the best rated attribute at the three town centres (fifth for visitors to outer London Town Centres overall). 'Graffiti and fly posting' was second best rated as for the overall visitor sample.

Interestingly, 'ease of cycling' was a middle ranked attribute for cyclists although bottom rated for visitors overall.

As for the visitor samples the Kingston cycle booster sample generally gained the best ratings and Walthamstow the worst.

Figure 72: Ratings of different urban realm aspects by Mini-Holland cycle boosters – mean scores



Base: Mini-Holland town centre cycle boosters: Enfield Town 50, Kingston 63, Walthamstow 48

5.8 Shopping and Expenditure in the Area

A wide range of services and shops were visited by participants. Almost half of the visitors to outer London Town Centres were shopping for groceries and food (49%) and 25% were shopping for clothes or footwear as shown in Figure 73.

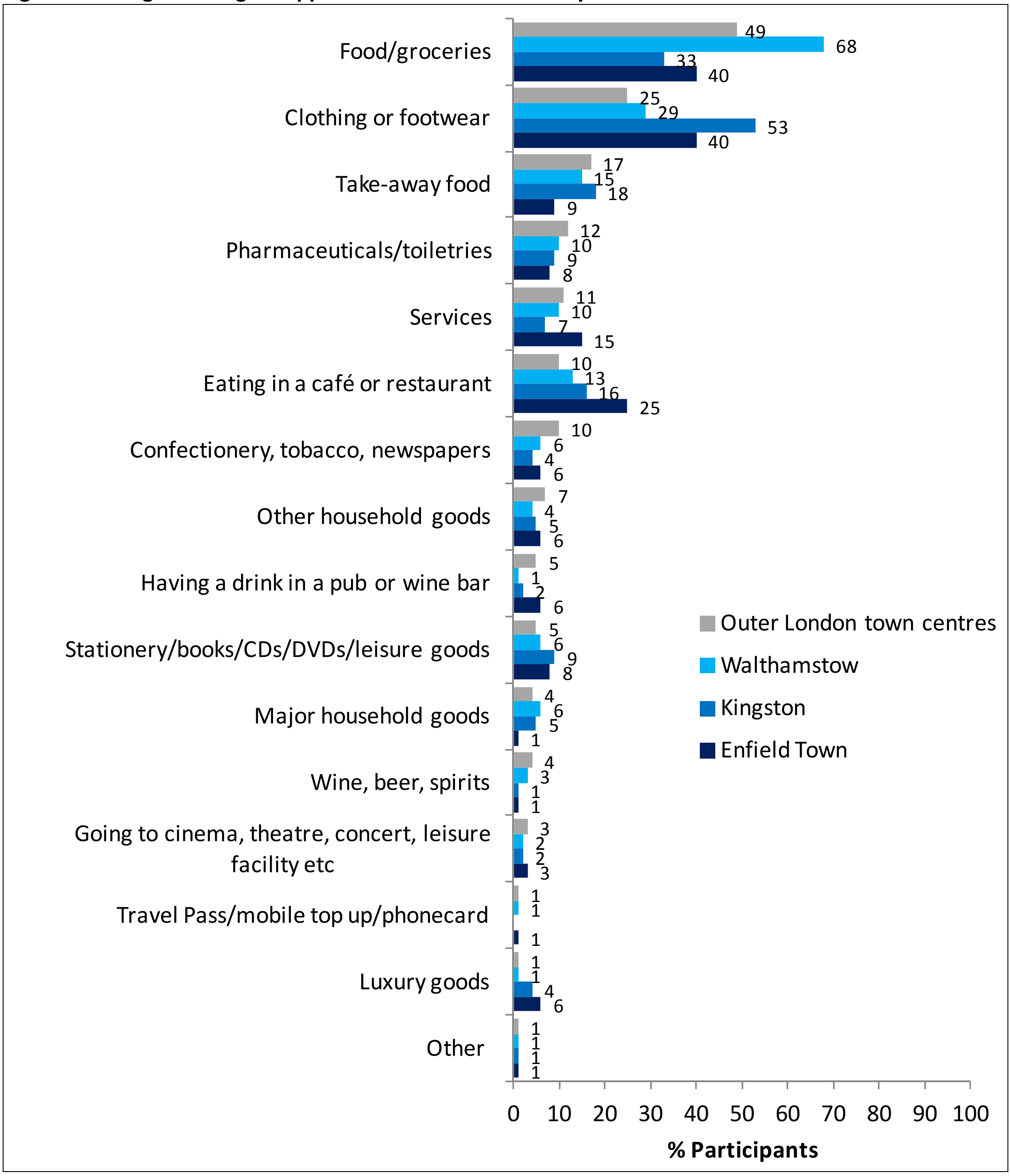
It is worth noting that larger items such as household white and brown goods are less frequent purchases and that the survey is more likely to pick up regular purchases and more portable items.

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

- Take away food 17%
- Pharmaceuticals/toiletries 12%

- Services (eg hairdressers) 11%
- Café or restaurant 10%
- Confectionery, tobacco, newspapers 10%.

Figure 73: Range of things shopped for and services used by Mini-Holland town centres



Base: Mini-Holland Boroughs: Enfield Town 316, Kingston 317, Walthamstow 295; Outer London town centres, 1629

'Food/grocery shopping' was most mentioned at Walthamstow (68%) and least mentioned at Kingston (33%).

'Clothing or footwear' was most mentioned at Kingston (53%) and least mentioned at Walthamstow (29%).

‘Take away food was third most mentioned at Walthamstow and Kingston. ‘Eating in a café or restaurant’ was third most mentioned at Enfield Town.

The cycle booster samples had similar shopping patterns to the overall visitors at the town centres.

‘Food/grocery shopping’ was most mentioned at Walthamstow (52%) and least mentioned at Enfield Town (24%).

‘Clothing or footwear’ was most mentioned at Kingston (40%) and least mentioned at Walthamstow (17%).

‘Eating in a café or restaurant’ was most mentioned at Enfield Town and third most mentioned at Kingston (but not mentioned at all at Walthamstow).

Table 63: Range of things shopped for and services used by Mini-Holland cycle boosters

	Enfield Town %	Kingston %	Walthamstow %
Food/groceries	24	40	52
Clothing or footwear	26	40	17
Eating in a café or restaurant	34	21	0
Stationery/books/CDs/DVDs/leisure goods	16	13	6
Pharmaceuticals/toiletries	12	17	6
Confectionery, tobacco, newspapers	6	19	8
Services	8	17	8
Take-away food	6	17	6
Going to cinema, theatre, concert, leisure facility etc	2	6	8
Having a drink in a pub or wine bar	8	3	0
Wine, beer, spirits	2	3	4
Other household goods	4	2	2
Travel Pass/mobile top up/phonecard	2	2	0
Luxury goods	0	3	0
Major household goods	0	0	2
Other	0	8	4
Base	**50**	**63**	**48**

5.9 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 at outer London town centres was £35 on the day of interview. This was about the same at Enfield Town and Walthamstow. However, spend was much higher at Kingston (£53).

The usual spend per visit at outer London town centres was a little lower at (£29). The average spend per week was higher at Enfield Town (£32), Walthamstow (£35) and much higher at Kingston (£31).

The average spend per week was £72 at outer London town centres in 2015. Enfield Town was lower at £61 per week whereas Kingston (£82) and Walthamstow (£86) were higher.

	Enfield Town	Kingston	Walthm-stow	Outer London town centre
• Average spend on the day of interview	£36	£53	£34	£35
• Usual spend per visit	£32	£41	£35	£29
• Average spend per week	£61	£82	£86	£72

Cyclists in the cycle booster samples spent less on the visit, per visit and per week than visitors overall at each of the Mini-Holland town centres.

	Enfield Town	Kingston	Walthamstow
• Average spend on the day of interview	£24	£38	£22
• Usual spend per visit	£22	£39	£24
• Average spend per week	£44	£47	£68

5.10 Awareness and impact of improvements

In the 2015 survey a set of questions was added on whether participants had noticed improvements in the past year to:

- pedestrian facilities in the town centre area
- cyclist facilities in the town centre area
- the urban realm/landscape in the town

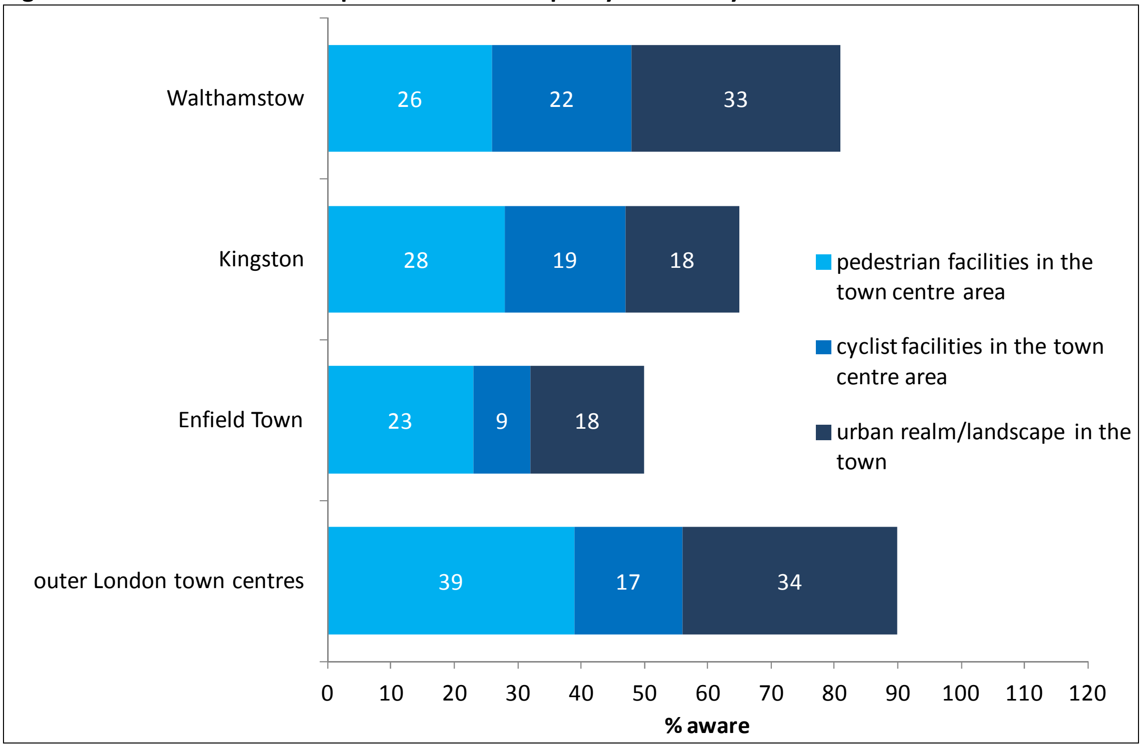
Overall, 39% of visitors to outer London town centres had noticed improvements to pedestrian facilities, 17% to cycle facilities and 34% to the urban realm/landscape.

Improvements to pedestrian facilities were noted less at the three mini-Holland town centres than in other outer London town centres: 23-26% compared to 39%.

Improvements to cyclist facilities were most noted in Walthamstow (22%) and Kingston (19%) and least in Enfield Town (9%).

Urban realm/landscape improvements were most noted in Walthamstow (33%), about the same as for other outer London town centres in total (34%). However, at Kingston and Enfield Town it was only 18%.

Figure 74: Whether noticed improvements in the past year to…. by Mini-Holland town centres



Base: Mini-Holland Boroughs: Enfield Town 316, Kingston 317, Walthamstow 295; Outer London town centres, 1629

The cyclist booster sample in Walthamstow was much more likely than the overall sample in Walthamstow to notice improvements: 38% compared to 26% had noticed improvements to pedestrian facilities; 48% compared to 22% had noticed improvements and to cycle facilities and 58% compared to 33% had noticed improvements to the urban realm/landscape.

There was relatively little difference between the cycle booster and overall samples at Kingston and Enfield Town.

	Enfield Town %	Kingston %	Waltham-stow %
• pedestrian facilities in the town centre area	20	22	38
• cyclist facilities in the town centre area	8	19	48
• urban realm/landscape in the town	20	16	58

Those who had noticed improvements were asked if these improvements had encouraged them to walk (if pedestrian improvements), cycle (if cyclist improvements) or visit and walk (if urban realm/landscape improvements).

For those who had noticed improvements in the past year to the pedestrian facilities in the outer London town centres overall, 44% said they walked more in the area as a result (2% said they walked less). The samples at Walthamstow (72%) and Kingston (57%) were much more likely to say they walked more. At Enfield only 37% said they walked more.

For those who had noticed improvements in the past year to the cyclist facilities in the outer London town centres overall, 28% said the cycled more in the area as a result (4% said they walked less). The samples at Walthamstow (59%) and Kingston (65%) were much more likely to say they cycled more. At Enfield only 14% said they cycled more.

For those who had noticed improvements in the past year to the urban realm/landscape in the outer London town centres overall, 38% said they visited the area more as a result. The samples at Walthamstow (65%) and Kingston (71%) were much more likely to say they visited the area more. At Enfield 35% said they visited the area more.

Forty three per cent in the outer London town centres said they walked in the area more as a result. The samples at Walthamstow (61%) and Kingston (68%) were much more likely to say they walked more. At Enfield 41% said they walked more.

5.11 Respondent Characteristics

Gender

Overall, 56% of outer London town centre visitors were female. At Walthamstow the proportion was the same. At Kingston it was a little higher (58%) and higher still at Enfield Town (61%).

By contrast, the cycle booster samples were more likely to be male: 66% at Enfield Town, 63% at Walthamstow and 54% at Kingston.

Age

There was a fairly even spread of ages for the overall outer London town centre sample with 39% aged between 16 and 34, 41% aged between 35 and 59 and 17% aged over 60 years old. The visitors at the three mini-Holland town centres had older age profiles than the overall outer London town centre sample:

- Enfield: 24% aged over 60 years old
- Walthamstow: 23% aged over 60 years old
- Kingston: 19% aged over 60 years old

Table 64: Age by Mini-Holland town centres

	Enfield Town %	Kingston %	Walthamstow %	Outer London town centres %
16-24	14	13	10	16
25-34	14	22	24	23
35-44	21	17	21	22
45-54	18	17	15	12
55-59	9	11	7	7
60-64	10	7	6	7
65-74	10	8	11	7
75 or over	4	5	6	3
Base	**316**	**317**	**295**	**1629**

The cycle booster samples in Enfield and Walthamstow had younger age profiles than overall visitors at the town centres.

- Enfield: 10% compared to 24% aged over 60 years old
- Walthamstow: 0% compared to 23% aged over 60 years old

Table 65: Age by Mini-Holland cycle boosters

	Enfield Town %	Kingston %	Walthamstow %
16-24	18	10	8
25-34	22	17	29
35-44	24	24	31
45-54	20	22	27
55-59	6	3	4
60-64	4	8	0
65-74	2	14	0
75 or over	4	2	0
Base	**50**	**63**	**48**

Ethnicity

Fifty six per cent of the Outer London town centre sample was from a White background. Visitors at the three mini-Holland town centres were much more likely to be white than overall outer London town centre sample: 85% at Kingston, 71% at Enfield Town and 61% at Walthamstow.

Table 66: Ethnicity by Mini-Holland town centres

	Enfield Town %	Kingston %	Walthamstow %	Outer London town centres %
White	71	85	61	56
Asian or Asian British	8	5	16	23
Black or Black British	15	6	20	16
Mixed	3	3	3	5
Chinese or other ethnic background	2	1		1
Base	**316**	**317**	**295**	**1629**

The cycle booster samples were quite similar to the overall visitor samples in the the three Mini-Holland town centres.

Table 67: Ethnicity by Mini-Holland cycle boosters

	Enfield Town %	Kingston %	Walthamstow %
White	84	81	65
Asian or Asian British	8	5	4
Black or Black British	4	11	23
Mixed	2	2	2
Chinese or other ethnic background	2	2	4
Don't know	0	0	2
Base	**50**	**63**	**48**

Employment status

Sixty five per cent of the Outer London town centre sample was employed, either full time (48%), or part time (17%). 14% were retired. The Kingston sample was quite similar to the overall Outer London town centre sample. The Walthamstow and Enfield Town samples were less likely to be employed and more likely to be retired than the overall Outer London town centre sample.

Table 68: Employment Status by Mini-Holland town centres

	Enfield Town %	Kingston %	Walthamstow %	Outer London town centres %
Working full time (30+ hours a week)	50	50	42	48
Working part time (<30 hours a week)	12	16	15	17
A full time student	6	6	5	8
A part time student	*	0	1	*
Not working, but looking for work	3	2	4	3
Not working and not looking for work	3	3	5	4
Retired	22	16	20	14
Looking after family and home	3	8	8	6
Other	0	*	*	*
Base	**316**	**317**	**295**	**1629**

* = less than 0.5%

The cycle booster samples in Enfield and Walthamstow were more likely to be employed than the overall samples:

- Enfield Town: 80% employed compared to 62% overall
- Walthamstow: 75% employed compared to 57% overall

For Kingston the proportion was similar to the overall sample.

Table 69: Employment Status by Mini-Holland cycle boosters

	Enfield Town %	Kingston %	Walthamstow %
Working full time (30+ hours a week)	74	54	60
Working part time (<30 hours a week)	6	11	15
A full time student	10	5	13
A part time student	0	2	0
Not working, but looking for work	0	2	8
Not working and not looking for work	2	0	4
Retired	8	21	0
Looking after family and home	0	5	0
Other	0	2	0
Base	**50**	**63**	**48**

Household Income

Annual household income was probed. 46% of the Outer London town centre sample either refused to answer or said they did not know.

There was a fairly even income distribution across the income breaks shown to respondents with a median income band of £25,000-£34,999 for the Outer London town centre sample.

The Kingston and Enfield Town samples had higher income distributions:

- Kingston: 21% annual household incomes over £50k compared to 7% overall
- Enfield Town: 17% annual household incomes over £50k compared to 7% overall

For Walthamstow the income distribution was closer to the overall Outer London town centre sample.

Table 70: Gross annual household income before deductions by Mini-Holland town centres

	Enfield Town %	Kingston %	Walthamstow %	Outer London town centres %
Under £5,000	*	1	0	1
£5,000-£9,999	4	2	6	4
£10,000-£14,999	6	3	11	4
£15,000-£19,999	6	6	6	8
£20,000-£24,999	7	13	9	10
£25,000-£34,999	10	12	12	12
£35,000-£49,999	8	17	14	10
£50,000-£74,999	10	15	8	5
£75,000-£99,999	4	4	1	1
£100,000 or over	3	2	0	1
Don't know	35	20	27	39
Refused	5	5	4	7
Base	**316**	**317**	**295**	**1629**

* = less than 0.5%

For the cycle booster samples much higher proportions said don't know.

Table 71: Gross annual household income before deductions by Mini-Holland cycle boosters

	Enfield Town %	Kingston %	Walthamstow %
Under £5,000	2	0	0
£5,000-£9,999	0	0	0
£10,000-£14,999	2	3	0
£15,000-£19,999	12	2	4
£20,000-£24,999	12	6	6
£25,000-£34,999	12	3	4
£35,000-£49,999	8	0	15
£50,000-£74,999	4	10	6
£75,000-£99,999	4	8	2
£100,000 or over	0	6	4
Don't know	44	62	56
Refused	0	0	2
Base	**50**	**63**	**48**

Household Size

The median household size for the Outer London town centre sample was four, representing 24% of households. At Walthamstow and Enfield Town the median household size was three and at Kingston it was two.

Table 72: Number of people in household by Mini-Holland town centres

	Enfield Town %	Kingston %	Walthamstow %	Outer London town centres %
One	11	14	16	14
Two	29	38	24	23
Three	32	28	27	23
Four	22	14	22	24
Five	3	4	8	11
Six or more	3	2	3	3
Refused	*	0	0	*
Base	**316**	**317**	**295**	**1629**

* = less than 0.5%

The cycle booster samples were more likely to live alone than the overall sample in each of the town centres.

Table 73: Number of people in household by Mini-Holland cycle boosters

	Enfield Town %	Kingston %	Walthamstow %
One	24	24	19
Two	26	32	21
Three	22	24	10
Four	20	11	29
Five	8	6	13
Six or more	0	3	8
Base	**50**	**63**	**48**

Access to a Car

Six tenths of the Outer London town centre sample had no access to a car. At Walthamstow the proportion was similar (62%) whereas at Enfield Town and Kingston the proportion was much lower: 43% and 41% respectively.

Table 74: Access to a car or van that you could have used for your journey to this area today by Mini-Holland town centres

	Enfield Town %	Kingston %	Walthamstow %	Outer London town centres %
Yes, drove (a car in my household) today	17	28	13	14
Yes, drove a car club car today	0	2	1	1
Yes, but used another mode	38	29	24	23
No – no access to a car or van	43	41	62	60
Refused	2	0	0	*
Base	**316**	**317**	**295**	**1629**

* = less than 0.5%

Walthamstow cyclists were more likely to have access to car than the overall sample: 46% compared to 38%.

At Enfield Town and Kingston cyclists were less likely to have access to car than the overall sample:

- Enfield Town: 42% compared to 55%
- Kingston: 65% compared to 59%.

Physical and Mental Impairments

Seven per cent of the Outer London town centre sample had a long-term physical or mental disability which limits daily activities or work they could do. This compares to 5% in Enfield Town, 7% in Kingston and 10% in Walthamstow.

Table 75: Long term physical or other impairment which limits your daily activities or the work you can do, including problems due to age by Mini-Holland town centres

	Enfield Town %	Kingston %	Walthamstow %	Outer London town centres %
No, none	95	93	90	93
Mobility impairment	4	5	7	3
Visual impairment	*	0	*	*
Hearing impairment	*	1	1	1
Mental health condition	0	*	*	*
Serious long term illness	*	1	*	1
Base	**316**	**317**	**295**	**1629**

* = less than 0.5%

Lower proportions of the cycle booster samples had a long-term physical or mental disability which limits daily activities or work they could do than for the overall town centre samples.

Table 76: Long term physical or other impairment which limits your daily activities or the work you can do, including problems due to age by Mini-Holland cycle boosters

	Enfield Town %	Kingston %	Walthamstow %
No, none	100	95	94
Mobility impairment	0	2	4
Visual impairment	0	2	0
Hearing impairment	0	0	2
Mental health condition	0	2	0
Base	**50**	**63**	**48**

APPENDIX A

Questionnaire

LOCATION:

1. Bromley
2. Eltham
3. Enfield Town
4. Hayes
5. Harlesden
6. Ilford
7. Kingston
8. Lewisham
9. Oxford Street/Regent Street
10. Romford
11. Stratford
12. Walthamstow
13. Wimbledon
14. Woolwich

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EP:
1
2
3

IF LOCATION =3, 7, 8, 9, 12, 13 or 14 ASK SHIFT TYPE
1 Cycle booster
2 Other

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? **SHOW SCREEN**

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

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

1. Yes, have/will be using shops/facilities
2. No, just passing through **IF LOCATION = 9 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 screen and tell me which of these best describes your reasons for visiting this area on this occasion today? **SHOW SCREEN. CODE ALL MENTIONED IN Q3 BELOW**

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

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

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

Details of visiting area

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

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

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

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

Mode of transport

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

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

Q7B **IF Q7 <> WALK OR CYCLE ASK:** Did you also walk or cycle (for 5 minutes or more) as part of your trip to travel to this area today, for example to get to / from the station or bus stop?

1 Yes, walk at least 5 minutes
2 Yes, cycle at least 5 minutes
3 Yes, walk and cycle
4 No

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

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 area? **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 Tram
11 Other **TYPE IN** ....
12 None

Q9a **ASK IF Q7= 5, 6, 7, OR 12:** Did you also walk or cycle (for at least 5 minutes) as part of your trip, for example to get to/from the station or bus stop?

1 yes, walked for 5+ minutes
2 yes, cycled for 5+ minutes
3 yes, walked and cycled
4 no

Q9b **ASK IF Q7<>5, 6, 7, 12 AND Q9=3,4,5 OR 10:** On occasions when you use public transport to get to this area, do you normally also walk or cycle (for at least 5 minutes) as part of your trip, for example to get to/from the station or bus stop?

1 yes, walk for 5+ minutes
2 yes, cycle for 5+ minutes
3 yes, walk and cycle
4 no

Q10. **IF BUS AT Q7 ASK:** How would you rate the following aspects of your journey by bus today? **SHOW SCREEN. 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 screen describe why you decided to use …. **(MODE OF TRANSPORT USED AT Q7)** rather than any other method of transport? **SHOW SCREEN. 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 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
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 Never
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
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 Not at all/never
10 Don't know

Q15. Which of the things shown on this screen would encourage you to use buses more often in this area? **SHOW SCREEN. 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 stops feel safer	1	13
14	Bus stop nearer home/destination	1	14
15	Improved ease of getting on and off buses	1	15
16	More information about buses	1	16
17	Safer buses	1	17
18	Make children behave/school buses	1	18
19	Cleaner buses	1	19
20	Greener buses	1	20
21	Lower fares	1	21
22	Other **(PLEASE TYPE IN)**	1	22

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

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
2 easy
3 neither easy nor difficult
4 difficult
5 very 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
2 Fairly safe
3 A bit unsafe
4 Very unsafe
5 Never go out in the day

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

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

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

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

Q18x How would you rate the following aspects of this area? **SHOW MAP. SHOW SCREEN. READ OUT**

			0	1	2	3	4	5	6	7	8	9	10	
a)	attractiveness?	very unattractive	0	1	2	3	4	5	6	7	8	9	10	very attractive
b)	traffic noise?	very noisy	0	1	2	3	4	5	6	7	8	9	10	very quiet
c)	a relaxing place to be?	very stressful	0	1	2	3	4	5	6	7	8	9	10	very relaxing
d)	ease of crossing the main road?	very difficult	0	1	2	3	4	5	6	7	8	9	10	very easy
e)	air quality?	very poor	0	1	2	3	4	5	6	7	8	9	10	very good
f)	ease of walking around?	very difficult	0	1	2	3	4	5	6	7	8	9	10	very easy
g)	graffiti and fly posting?	significant graffiti / flyposting	0	1	2	3	4	5	6	7	8	9	10	no graffiti / flyposting
h)	litter?	significant litter	0	1	2	3	4	5	6	7	8	9	10	no litter
i)	pavement condition?	cracked and uneven	0	1	2	3	4	5	6	7	8	9	10	no cracks and even
j)	seating areas?	no seating areas	0	1	2	3	4	5	6	7	8	9	10	some seating areas
k)	trees and plants?	no trees and plants	0	1	2	3	4	5	6	7	8	9	10	some trees and plants
l)	ease of cycling?	very difficult	0	1	2	3	4	5	6	7	8	9	10	very easy

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

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

Q19. **IF NOT CYCLIST (Q7 <> 8 OR 9 OR Q9 <> 6 OR 7) ASK:** Which of the things shown on the screen would encourage you to cycle more often in this area? **SHOW SCREEN. CODE ALL MENTIONED**

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

Q19x **IF CYCLIST (Q7 = 8 OR 9) ASK:** Which of the things shown on the screen encouraged you [or influenced your choice to cycle here today? **SHOW SCREEN. CODE ALL MENTIONED**

1 Cycle lanes on the roads 1
2 Dedicated cycle paths 1
3 Cycle routes to / through the town centre 1
4 Little road traffic 1
5 Free on-road cycle training 1
6 Bicycle hire scheme 1

7 Bicycle parking facilities in this area 1
8 Bicycle parking facilities at / near your home 1
9 None of these / nothing 1
10 Don't know

Q19b And which of the things on the screen would make you feel safer cycling in this area? **SHOW SCREEN. 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

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

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

Q22. How satisfied are you with each of the following: **SHOW SCREEN. 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 screen and tell me the range of things you are shopping for or services you are using in this area today? **SHOW SCREEN. 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? **SHOW SCREEN**

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

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

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		

Q26a Have you noticed any improvements to pedestrian facilities in the town centre area in the past year?

Yes
No

Q26b **IF Q26A=1 ASK:** Have these improvements encouraged you to walk in the area more or less than before?

More
Less
No impact

Q26c Have you seen any improvements to cyclist facilities in the town centre area in the past year?

Yes
No

Q26d **IF Q26C=1 ASK:** Have these improvements encouraged you to cycle in the area more or less than before?

More
Less
No impact

Q26e Have you seen any improvements to the urban realm/landscape in the town centre area in the past year?

Yes
No

Q26f **IF Q26E=1 ASK:** Have these improvements encouraged you to visit the area more or less than before?

More
Less
No impact

Q26g **IF Q26E=1 ASK:** Have these improvements encouraged you to walk in the area more or less than before?

More
Less
No impact

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

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 / more seating	9	9
10	Remove undesirable element/more policing	10	10
11	Less traffic/ lower speed limits	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: **SHOW SCREEN. READ OUT**

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

All

Q29A Do you go to any of these shopping centres in and around London? **SHOW SCREEN. 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
2 Elsewhere in England
3 Scotland, Wales or Northern Ireland
4 Outside of the UK
5 Don't know
6 Refused

Q29D Do you do internet shopping?

1 Yes
2 No **GO TO Q30**

Q29E What kinds of things do you order online? **SHOW SCREEN, 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-away food 1
9 Tickets (air, rail, concerts) 1
10 Other (type in) 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? **SHOW SCREEN, 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 area?

1 very easy
2 easy
3 neither easy nor difficult
4 difficult
5 very difficult

Q31. Do you use a wheelchair for travelling?

1 Yes
2 No
3 Refused

Q32. Is the respondent carrying any of the following…? **CODE BY OBSERVATION**

1 Shopping bag(s) / shopping trolley
2 Buggy / pram
3 Carrying a child / baby
4 Suitcase / rucksack
5 Other large / awkward object
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? **SHOW SCREEN**

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

Q34. **RECORD GENDER**

1 Male
2 Female

Q35. Which of the following best describes your working status? **SHOW SCREEN**

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? **SHOW SCREEN**

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 (a car in my household) today	4	No – no access to a car or van
2	Yes, drove a car club car today	5	Refused
3	Yes, but used another mode		

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. **SHOW SCREEN**

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: ....

LOCATION:

1. Barking	7. Hornchurch
2. Bexleyheath	8. Kingston
3. Clapham Junction	9. Oxford Street/Regent Street
4. Clapham Old Town	10. Richmond
5. Ealing	11. Uxbridge
6. Enfield Town	12. Walthamstow

Town Centres Survey 2014

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.

Q1Can I just check – do you or does anyone in your household work in any of the following occupations? **SHOW SCREEN**

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

Q2Have 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? **SHOW MAP**

Yes, have/will be using shops/facilities

No, just passing through **IF LOCATION = 9 CONTINUE; OTHERWISE THANK AND CLOSE**

Q3All the questions I am going to ask you refer to the area shown on this map. **SHOW MAP** Please look at this screen and tell me which of these best describes your reasons for visiting this area on this occasion today? **SHOW SCREEN. CODE ALL MENTIONED IN Q3 BELOW**

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

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

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

DETAILS OF VISITING AREA

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

1 5 or more days a week	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

Q6Do 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

Q7How 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 **TYPE IN** ....

Q8How frequently do you use **[MODE OF TRANSPORT AT Q7]** to travel to this area?

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

Q9What 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 **TYPE IN** ....

Q10 **IF BUS AT Q7 ASK:** How would you rate the following aspects of your journey by bus today? **SHOW SCREEN. 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 screen describe why you decided to use …. (mode of transport used at Q7) rather than any other method of transport? **SHOW SCREEN. 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 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
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 Never
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
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 Not at all/never
10 Don't know

Q15 Which of the things shown on this screen would encourage you to use buses more often in this area? **SHOW SCREEN. 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 TYPE 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? **SHOW SCREEN. CIRCLE ONE CODE IN COLUMN Q16 ABOVE FOR ONE REASON ONLY**

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
2 easy
3 neither easy nor difficult
4 difficult
5 very 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
2 Fairly safe
3 A bit unsafe
4 Very unsafe
5 Never go out in the day

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

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

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

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

Q18x How would you rate the following aspects of this area? **SHOW MAP. SHOW SCREEN. READ OUT**

		very unattractive									very attractive	
a)	attractiveness?......................................	0	1	2	3	4	5	6	7	8	9	10
		very noisy									very quiet	
b)	traffic noise?	0	1	2	3	4	5	6	7	8	9	10
		very stressful									very relaxing	
c)	a relaxing place to be?	0	1	2	3	4	5	6	7	8	9	10
		very difficult									very easy	
d)	ease of crossing the main road?	0	1	2	3	4	5	6	7	8	9	10
		very poor									very good	
e)	air quality?	0	1	2	3	4	5	6	7	8	9	10
		very difficult									very easy	
f)	ease of walking around?	0	1	2	3	4	5	6	7	8	9	10
		significant graffiti / flyposting									no graffiti / flyposting	
g)	graffiti and fly posting?	0	1	2	3	4	5	6	7	8	9	10
		significant litter									no litter	
h)	litter?...	0	1	2	3	4	5	6	7	8	9	10
		cracked and uneven									no cracks and even	
i)	pavement condition?.............................	0	1	2	3	4	5	6	7	8	9	10
		no seating areas									some seating areas	
j)	seating areas?	0	1	2	3	4	5	6	7	8	9	10
		no trees and plants									some trees and plants	
k)	trees and plants?	0	1	2	3	4	5	6	7	8	9	10

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

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

Q19 Which of the things shown on the screen would encourage you to cycle more often in this area? **SHOW SCREEN. 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

Q19b And which of the things on the screen would make you feel safer cycling in this area? **SHOW SCREEN. 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

Q20 **ASK IF DROVE OR WAS GIVEN LIFT (Q7 CODES 1-4), OTHERWISE GO TO Q22** Where did you park your vehicle? Was it… **READ OUT**

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

Q21 How satisfied are you with each of the following: **SHOW SCREEN. 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

Q22 Could you look at this screen and tell me the range of things you are shopping for or services you are using in this area today? **SHOW SCREEN. 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

Q23 How much will you have spent in this area today? **SHOW SCREEN**

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

Q24 How much do you typically spend on average per visit to this area? **SHOW SCREEN**

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 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		

Q26 In what ways do you think this area could be improved? **SHOW MAP. CODE ALL MENTIONED IN COLUMN A BELOW. SHOW SCREEN**

Q27 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: **SHOW SCREEN. READ OUT**

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

All

Q29A Do you go to any of these shopping centres in and around London? **SHOW SCREEN. 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
2 Barnet
3 Bexley
4 Brent
5 Bromley
6 Camden
7 City of Westminster
8 Croydon
9 Ealing
10 Enfield
11 Greenwich
12 Hackney
13 Hammersmith & Fulham
14 Haringey
15 Harrow
16 Havering
17 Hillingdon
18 Hounslow
19 Islington
20 Kensington & Chelsea
21 Kingston-upon-Thames
22 Lambeth
23 Lewisham
24 Merton
25 Newham
26 Redbridge
27 Richmond-upon-Thames
28 Southwark
29 Sutton
30 Tower Hamlets
31 Waltham Forest
32 Wandsworth
33 Do not live in London **GO TO Q29C**
34 Don't know
35 Refused

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

1 The South East of England
2 Elsewhere in England
3 Scotland, Wales or Northern Ireland
4 Outside of the UK
5 Don't know
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? **SHOW SCREEN, 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? **SHOW SCREEN, 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 area?

1 very easy
2 easy
3 neither easy nor difficult
4 difficult
5 very difficult

Q31 Do you use a wheelchair for travelling?

1 Yes
2 No
3 Refused

Q32 Is the respondent carrying any of the following…? **CODE BY OBSERVATION**

1 Shopping bag(s) / shopping trolley
5 Buggy / pram
6 Carrying a child / baby
4 Suitcase / rucksack
5 Other large / awkward object
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? **SHOW SCREEN**

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? **SHOW SCREEN**

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? **SHOW SCREEN**

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. **SHOW SCREEN**

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 77: Gender by town centre 2015

	Bromley %	Eltham %	Enfield Town %	Hayes %	Harlesden %	Ilford %	Kingston %	Lewisham %	Oxford Street/ Regent Street %	Romford %	Stratford %	Walthamstow %	Wimbledon %	Woolwich %
Male	36	28	39	55	40	42	42	37	36	44	42	44	41	26
Female	64	72	61	45	60	58	58	63	64	56	58	56	59	74
Weighted base	**302**	**304**	**316**	**302**	**294**	**298**	**317**	**311**	**299**	**304**	**297**	**295**	**295**	**289**

Table 78: Gender by town centre 2014

	Barking %	Bexleyheath %	Clapham Junction %	Clapham Old Town %	Ealing %	Enfield Town %	Hornchurch %	Kingston %	Oxford Street/ Regent Street %	Richmond %	Uxbridge %	Walthamstow %
Male	36	37	33	36	44	43	33	38	37	30	44	41
Female	64	63	67	64	56	57	67	62	63	70	56	59
Weighted base	**292**	**292**	**287**	**294**	**288**	**294**	**295**	**292**	**294**	**291**	**310**	**302**

Table 79: Age by town centre 2015

	Bromley %	Eltham %	Enfield Town %	Hayes %	Harlesden %	Ilford %	Kingston %	Lewisham %	Oxford Street/ Regent Street %	Romford %	Stratford %	Walthamstow %	Wimbledon %	Woolwich %
16-24	24	12	14	9	13	18	13	18	18	15	17	10	17	14
25-34	16	12	14	23	27	25	22	16	24	22	22	24	20	25
35-44	14	16	21	30	21	24	17	20	20	19	21	21	17	18
45-54	14	14	18	15	13	14	17	17	19	17	14	15	11	14
55-59	8	10	9	6	8	9	11	8	10	7	9	7	10	8
60-64	11	12	10	8	7	4	7	7	4	7	6	6	8	7
65-74	10	13	10	7	9	4	8	9	5	5	8	11	10	9
75 or over	4	11	4	2	1	3	5	4	1	8	4	6	7	5
Refused	0	0	0	0	0	0	0	*	0	0	0	0	0	0
Weighted base	**302**	**304**	**316**	**302**	**294**	**298**	**317**	**311**	**299**	**304**	**297**	**295**	**295**	**289**

* = less than 0.5%

Table 80: Age by town centre 2014

	Barking %	Bexleyheath %	Clapham Junction %	Clapham Old Town %	Ealing %	Enfield Town %	Hornchurch %	Kingston %	Oxford Street/ Regent Street %	Richmond %	Uxbridge %	Walthamstow %
16-24	14	23	10	16	23	13	15	23	22	16	25	17
25-34	20	15	28	28	18	20	9	19	25	19	19	18
35-44	18	13	20	24	16	19	12	14	16	18	18	19
45-54	19	14	17	17	18	18	23	11	19	13	12	20
55-59	9	10	5	5	9	8	9	11	10	12	6	7
60-64	8	9	5	5	4	9	10	5	3	9	7	8
65-74	8	9	13	4	10	7	15	11	5	8	9	8
75 or over	4	7	3	0	2	6	7	5	1	6	4	2
Refused	*	0	0	0	0	0	0	*	0	*	*	0
Weighted base	**292**	**292**	**287**	**294**	**288**	**294**	**295**	**292**	**294**	**291**	**310**	**302**

* = less than 0.5%

Table 81: Ethnicity by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
White	83	87	71	31	38	42	85	65	67	74	64	61	84	73
Black or Black British	4	2	8	47	25	35	5	5	19	7	14	16	7	6
Asian or Asian British	6	8	15	19	30	17	6	25	9	14	17	20	5	18
Mixed	7	2	3	2	4	5	3	4	2	5	4	3	4	3
Chinese or other	*	1	2	1	3	1	1	1	2	*	*	0	*	0
Weighted base	**302**	**304**	**316**	**302**	**294**	**298**	**317**	**311**	**299**	**304**	**297**	**295**	**295**	**289**

* = less than 0.5%

Table 82: Ethnicity by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
White	70	92	78	84	61	72	90	87	78	83	69	62
Black or Black British	15	4	10	11	16	16	7	5	7	5	10	19
Asian or Asian British	11	2	7	2	19	9	3	6	8	5	16	12
Mixed	3	1	3	2	2	3	*	2	3	3	2	5
Chinese or other	1	*	1	1	1	0	*	0	2	3	3	1
Weighted base	**292**	**292**	**287**	**294**	**288**	**294**	**295**	**292**	**294**	**291**	**310**	**302**

* = less than 0.5%

Table 83: Employment Status by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
Working full time (30+ hours a week)	35	33	50	60	46	55	50	41	63	42	48	42	47	34
Working part time (less than 30 hours a week)	20	19	12	9	17	18	16	14	12	19	16	15	14	12
A full time student	9	6	6	6	7	8	6	10	10	5	6	5	8	4
A part time student	0	0	*	*	*	*	0	0	1	1	1	1	1	*
Not working, but looking for work	4	2	3	3	3	2	2	4	2	4	3	4	2	5
Not working and not looking for work	5	3	3	6	7	3	3	4	2	3	7	5	2	15
Retired	19	28	22	11	12	8	16	18	7	18	16	20	23	19
Looking after family and home	6	7	3	4	8	6	8	9	4	8	4	8	3	10
Other	1	1	0	0	0	*	*	1	0	0		*	1	0
Weighted base	**302**	**304**	**316**	**302**	**294**	**298**	**317**	**311**	**299**	**304**	**297**	**295**	**295**	**289**

* = less than 0.5%

Table 84: Employment Status by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
Working full time (30+ hours a week)	43	33	51	58	49	52	34	42	57	50	43	47
Working part time (less than 30 hours a week)	12	16	17	15	14	14	21	11	13	13	12	16
A full time student	3	6	3	7	15	4	9	16	14	8	17	6
A part time student	1	1	*	1	0	*	0	2	1	*	*	1
Not working, but looking for work	7	8	2	5	3	3	3	1	2	2	3	5
Not working and not looking for work	8	4	2	5	2	3	2	3	4	3	2	3
Retired	17	20	18	6	14	19	27	19	6	21	20	15
Looking after family and home	10	11	5	4	3	5	3	3	2	2	3	5
Other	0	1	*	*	*	0	0	2	1	*	0	1
Weighted base	**291**	**290**	**304**	**307**	**300**	**299**	**289**	**308**	**306**	**298**	**296**	**300**

* = less than 0.5%

Table 85: Income by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
Under £5,000	*	2	*	2	1	2	1	3	1	1	2		1	3
£5,000-£9,999	2	6	4	1	5	3	2	6	*	7	7	6	3	6
£10,000-£14,999	3	5	6	6	8	4	3	8	3	5	6	11	4	11
£15,000-£19,999	5	7	6	8	9	8	6	5	2	6	6	6	5	9
£20,000-£24,999	5	9	7	13	12	14	13	14	5	10	11	9	6	11
£25,000-£34,999	7	11	10	14	16	16	12	12	10	10	11	12	7	11
£35,000-£49,999	6	8	8	13	10	8	17	9	10	15	11	14	8	7
£50,000-£74,999	9	4	10	2	3	5	15	4	10	5	4	8	10	4
£75,000-£99,999	4	3	4	1	*	1	4	1	7	1	1	1	7	0
£100,000 or over	1	0	3	*	0	0	2	*	6	0	1	0	3	0
Don't know	49	38	35	33	34	37	20	31	46	39	32	27	31	37
Refused	6	8	5	5	1	2	5	7	1	2	9	4	15	0
Weighted base	**302**	**304**	**316**	**302**	**294**	**298**	**317**	**311**	**299**	**304**	**297**	**295**	**295**	**288**

* = less than 0.5%

Table 86: Income by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
Under £5,000	2	*	2	2	1	*	1	1	1	1	5	2
£5,000-£9,999	6	2	4	3	4	4	3	2	1	2	3	3
£10,000-£14,999	11	8	3	3	6	4	6	5	3	3	5	6
£15,000-£19,999	9	5	5	5	6	8	4	5	5	4	7	5
£20,000-£24,999	8	8	7	6	5	9	6	5	5	1	8	6
£25,000-£34,999	12	3	12	9	15	12	8	9	8	6	7	7
£35,000-£49,999	14	10	8	10	11	12	7	7	7	10	8	9
£50,000-£74,999	2	9	9	12	8	5	6	9	11	10	7	7
£75,000-£99,999	*	2	3	6	4	2	2	4	5	5	2	2
£100,000 or over	0	*	8	4	1	1	1	4	7	7	1	2
Don't know	32	48	34	36	27	36	48	43	40	36	41	44
Refused	3	4	6	3	11	6	7	6	8	16	6	8
Weighted base	**292**	**291**	**286**	**294**	**288**	**294**	**295**	**292**	**294**	**291**	**309**	**302**

* = less than 0.5%

Table 87: Number of people in household by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
One	14	22	11	15	10	10	14	21	10	13	18	16	21	21
Two	26	35	29	24	24	17	38	27	25	30	26	24	30	22
Three	23	18	32	24	25	29	28	26	27	24	23	27	23	26
Four	23	14	22	25	26	26	14	14	27	22	21	22	20	21
Five	10	8	3	8	11	14	4	7	7	9	9	8	4	5
Six or more	3	3	3	4	4	3	2	5	4	3	3	3	2	4
Refused	0	0	*	0	0	1	0	0	*	0	0	0	*	0
Weighted base	**302**	**304**	**316**	**302**	**294**	**298**	**317**	**311**	**299**	**304**	**297**	**295**	**295**	**288**

* = less than 0.5%

Table 88: Number of people in household by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
One	18	16	16	17	21	18	16	18	13	22	21	21
Two	23	26	31	32	23	24	34	33	26	38	24	26
Three	25	22	26	22	20	27	22	17	25	14	22	21
Four	22	24	21	20	21	22	21	20	22	18	24	20
Five	6	9	5	6	9	8	5	8	8	5	5	8
Six or more	6	4	2	3	6	1	2	4	5	1	3	3
Refused	*	0	0	0	*	*	*	1	*	2	*	*
Weighted base	**292**	**292**	**287**	**294**	**288**	**294**	**295**	**292**	**294**	**291**	**310**	**302**

* = less than 0.5%

Table 89: Access to a car by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
Yes, drove (a car in my household) today	34	28	17	14	5	11	28	12	2	21	10	13	13	14
Yes, drove a car club car today	0	2	0	4	1	1	2	1	*	1	0	1	*	2
Yes, but used another mode	28	25	38	18	19	25	29	24	39	16	32	24	41	12
No – no access to a car or van	37	45	43	65	75	62	41	63	58	62	58	62	44	71
Refused	1	0	2	0	0	1	0	0	1	*	0	0	*	0
Weighted base	**302**	**304**	**316**	**302**	**294**	**298**	**317**	**311**	**299**	**304**	**297**	**295**	**295**	**288**

* = less than 0.5%

Table 90: Access to a car by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
Yes, drove today	15	29	7	3	11	18	24	20	1	13	18	15
Yes, but used another mode	31	20	34	36	37	34	43	34	48	43	28	31
No - no access to a car or van	54	51	57	61	52	47	33	46	51	43	54	54
Refused	*	0	2	0	*	*	0	*	0	1	*	*
Weighted base	**292**	**291**	**287**	**294**	**288**	**294**	**295**	**292**	**294**	**291**	**309**	**292**

* = less than 0.5%

Table 91: Mobility by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
No, none	86	86	95	98	96	95	93	88	98	92	92	90	92	83
Mobility impairment	6	9	4	1	2	3	5	8	2	6	6	7	6	13
Visual impairment	1	*	*	*	*	1	0	*	0	*	0	*	*	0
Hearing impairment	2	3	*	1	0	*	1	2	1	0	1	1	1	1
Learning disability	2	1	*	*	0	0	*	1	0	0	0	*	*	2
Mental health condition	2	1	0	0	1	*	*	1	0	1	*	*	0	2
Serious long term illness	2	1	*	1	*	1	1	1	0	1	1	*	0	1
Other	1	1	0	1	1	0	*	1	0	*	0	*	0	0
Weighted base	**302**	**304**	**316**	**302**	**294**	**298**	**317**	**311**	**299**	**304**	**297**	**295**	**295**	**289**

* = less than 0.5%

Table 92: Mobility by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
No, none	87	86	93	95	95	94	90	91	98	93	91	90
Mobility impairment	8	8	3	2	3	2	6	4	1	3	5	5
Visual impairment	1	2	*	1	1	0	*	1	*	*	0	*
Hearing impairment	0	2	0	*	*	1	1	1	0	2	1	2
Learning disability	1	*	1	0	*	0	0	0	0	0	0	0
Mental health condition	1	2	1	*	1	1	1	*	1	*	1	1
Serious long term illness	1	1	2	2	*	2	1	1	0	2	2	2
Other	1	1	*	*	0	*	0	2	0	1	1	*
Weighted base	**292**	**292**	**288**	**294**	**288**	**294**	**295**	**292**	**294**	**291**	**310**	**302**

* = less than 0.5%

Table 93: Whether use wheelchair for travelling by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
Yes	1	1	*	0	0	1	1	*	*	*	1	*	0	*
No	99	99	99	100	100	99	99	99	99	99	99	99	100	99
Weighted base	**302**	**304**	**316**	**302**	**294**	**298**	**317**	**311**	**299**	**304**	**297**	**295**	**295**	**289**

Table 94: Whether use wheelchair for travelling by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
Yes	*	*	0	0	0	0	*	0	0	*	*	0
No	99	99	100	100	100	100	99	100	100	99	99	100
Weighted base	**292**	**292**	**288**	**294**	**288**	**294**	**295**	**292**	**294**	**291**	**310**	**302**

* = less than 0.5%

Table 95: Whether carrying anything by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
Shopping bag(s)/shopping trolley	57	60	61	55	73	61	62	68	64	69	49	69	47	66
Buggy/pram	5	2	3	4	7	2	2	2	2	3	2	6	4	13
Carrying a child/baby	*	*	1	1	1	1	*	1	0	1	1	1	1	1
Suitcase/rucksack	5	7	4	*	2	9	2	5	4	7	13	8	7	1
Other large/awkward object	1	*	0	1	1	1	*	*	1	*	*	*	2	1
Nothing	37	32	33	43	21	27	34	25	31	24	35	20	41	27
Weighted base	**302**	**304**	**316**	**302**	**294**	**298**	**317**	**311**	**299**	**304**	**297**	**295**	**295**	**289**

* = less than 0.5%

Table 96: Whether carrying anything by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
Shopping bag(s)/shopping trolley	64	53	63	38	47	53	60	59	65	54	56	58
Buggy/pram	8	6	3	2	1	*	1	1	1	2	4	3
Carrying a child/baby	2	*	2	1	*	1	*	*	*	2	1	1
Suitcase/rucksack	7	6	23	20	9	7	23	14	12	9	10	6
Other large/awkward object	*	1	1	2		1	1	*		1	*	*
Nothing	28	37	25	46	46	45	29	32	26	38	38	34
Weighted base	**292**	**292**	**288**	**294**	**288**	**294**	**295**	**292**	**294**	**291**	**310**	**302**

* = less than 0.5%

Table 97: Where live by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
Inner London[24]	18	78	5	5	8	17	4	88	37	7	75	13	17	89
Outer London[25]	72	19	93	87	91	81	83	9	27	87	22	83	78	8
The South East of England	8	2	2	2	1	2	10	1	12	4	2	2	2	3
Elsewhere in England	1	1	*	6	0	*	2	1	5	3	1	2	3	*
Scotland, Wales or Northern Ireland	*	0	0	*	0	0	*	0	1	0	0	0	*	0
Outside of the UK	0	0	*	1	*	0	1	1	18	0	*	0	0	0
Weighted base	302	305	313	304	292	299	315	310	297	305	298	296	295	289

* = less than 0.5%

Table 98: Where live by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
Inner London[24]	10	2	25	80	10	10	4	4	35	10	5	91
Outer London[25]	87	87	73	18	86	88	92	80	28	80	87	6
The South East of England	2	9	1	1	1	2	3	13	14	6	6	2
Elsewhere in England	1	1	*	0	2	0	0	2	4	2	2	2
Scotland, Wales or Northern Ireland	0	0	*	0	0	0	0	*	3	*	*	0
Outside of the UK	0	1	*	1	0	0	*	1	16	2	0	0
Weighted base	**291**	**291**	**285**	**291**	**289**	**293**	**289**	**293**	**293**	**293**	**308**	**297**

* = less than 0.5%

[24] Inner London = Camden, City of Westminster, Greenwich, Hackney, Hammersmith & Fulham, Islington, Kensington & Chelsea, Lambeth, Lewisham, Newham, Southwark, Tower Hamlets, Wandsworth

[25] Outer London = Barking & Dagenham, Barnet, Bexley, Brent, Bromley, Croydon, Ealing, Enfield, Haringey, Harrow, Havering, Hillingdon, Hounslow, Kingston-upon-Thames, Merton, Redbridge, Richmond-upon-Thames, Sutton, Waltham Forest

Purpose of visit

Table 99: Main purpose mentioned for visiting the town centre by town centre 2015

	Bromley	Eltham	Enfield Town	Hayes	Harlesden	Ilford	Kingston	Lewisham	Oxford Street/ Regent Street	Romford	Stratford	Walthamstow	Wimbledon	Woolwich
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Shopping	65	66	65	54	61	63	73	77	71	63	61	73	61	84
Using service	7	16	15	9	6	9	8	8	0	8	10	7	8	3
Using public amenity	2	2	1	3	2	6	1	3	0	3	3	4	2	1
Eating/drinking out	9	3	4	11	6	8	8	5	3	7	5	4	6	6
Other social/leisure	2	2	*	1	1	5	0	*	1	1	1	3	3	0
Delivering goods	0	0	*	2	*	0	0	0	*	0	0	*	0	0
Window shopping	0	1	1	*	1	*	0	0	1	0	*	*	1	*
Personal business	1	2	*	2	1	3	0	1	2	2	3	2	1	*
General recreation	0	0	0	1	1	1	0	0	0	2	1	*	*	0
Live here	0	1	3	4	7	1	*	1	1	2	2	*	1	1
Work here	11	4	7	6	7	4	6	4	16	9	6	4	10	4
Travelling through the area	*	*	*	1	2	*	0	1	1	*	0	*	1	0
Visiting friends and relatives	2	*	4	4	4	*	1	1	2	1	6	0	5	*
Dropping off/picking up friend or relative	0	1	0	1	1	0	0	0	*	0	0	0	0	0
Other	0	2	0	2	*	0	1	0	2	0	0	0	*	*
Weighted base	**302**	**304**	**316**	**302**	**294**	**298**	**317**	**311**	**299**	**304**	**297**	**295**	**295**	**289**

* = less than 0.5%

Table 100: Main purpose mentioned for visiting the town centre by town centre 2014

	Barking	Bexleyheath	Clapham Junction	Clapham Old Town	Ealing	Enfield Town	Hornchurch	Kingston	Oxford Street/ Regent Street	Richmond	Uxbridge	Walthamstow
	%	%	%	%	%	%	%	%	%	%	%	%
Shopping	78	68	69	41	48	58	76	75	66	59	63	64
Using service	8	10	5	10	15	9	7	5	9	3	6	10
Using public amenity	1	2	*	*	0	3	1	*	1	1	0	1
Eating/drinking out	4	8	5	8	8	7	7	6	4	13	6	4
Other social/leisure	0	*	0	5	2	1	1	1	3	1	2	0
Delivering goods	0	0	0	*	0	0	*	0	0	0	0	1
Window shopping	1	2	*	1	*	0	0	2	1	0	1	1
Personal business	1	2	2	5	2	1	2	1	2	1	2	2
General recreation	1	0	0	2	*	1	0	*	*	*	1	*
Live here	1	*	5	15	3	2	3	0	*	3	4	7
Work here	4	5	9	10	20	12	1	6	12	11	9	8
Travelling through the area	0	0	*	*	*	0	0	*	0	0	1	0
Visiting friends and relatives	1	3	2	4	1	5	1	1	1	6	4	2
Dropping off/picking up friend or relative	0	*	1	0	*	0	0	0	0	0	0	0
Other	0	1	*	0	1	1	1	2	1	2	1	0
Weighted base	**292**	**292**	**288**	**294**	**288**	**294**	**295**	**293**	**294**	**292**	**311**	**302**

* = less than 0.5%

Mode of Access to area today

Table 101: Modes used to access each area by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
Drove a car/van/lorry	30	26	19	16	6	14	29	11	1	21	6	13	12	13
Drove a motorbike/moped/ scooter		1	0	1	0		0	0	0		1			0
Drove a delivery vehicle	0	0	0	0	0				0			0		
Given a lift	6	3	1	1		1	1	2		2	2	0	2	1
Bus	33	41	37	45	35	43	30	43	15	38	33	35	22	45
Tube/Underground			0	1	6	1		1	58		22	8	8	1
Train	12	1	11	6	4	10	14	9	19	15	12	4	19	4
Bicycle	1	1	1	2	3	1	4	2	2	1	1	1	3	1
Barclays Cycle Hire	17	27	28	28	46	28	22	30	3	22	23	38	31	33
Walked	1	0	2	1		2			1	0		0	0	0
Taxi/minicab								0					3	
Other		0					0	1	0	0	1	1		0
Weighted base	**302**	**304**	**158**	**302**	**294**	**298**	**159**	**311**	**299**	**304**	**297**	**147**	**295**	**289**

* = less than 0.5%

Table 102: Modes used to access each area by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
Drove a car/van/lorry	15	27	6	3	11	20	24	20	1	13	18	5
Drove a motorbike/moped/ scooter	0	0	*	0	0	0	*	0	0	0	1	0
Drove a delivery vehicle	0	0	0	0	0	0	0	0	*	0	*	0
Given a lift	1	4	1	1	1	2	1	1	0	1	1	1
Bus	40	41	37	22	38	42	36	42	21	27	33	31
Tube/Underground	5	*	2	20	13	0	*	*	55	8	17	7
Train	7	2	15	2	11	12	3	12	15	25	7	6
Bicycle	1	*	4	5	3	1	3	3	1	2	2	5
Barclays Cycle Hire	0	0	*	*	0	0	0	0	0	0	0	*
Walked	29	25	36	48	24	23	31	20	5	24	21	45
Taxi/minicab	1	*	0	*	0	0	*	0	1	1	1	*
Other	1	1	0	0	0	0	*	0	*	0	*	*
Weighted base	**292**	**292**	**288**	**294**	**288**	**294**	**295**	**293**	**294**	**292**	**311**	**302**

* = less than 0.5%

1. 6% = tram

Frequency of visiting centre

Table 103: Frequency of visiting town centre by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
5 or more days a week	22	29	22	47	59	33	31	37	19	29	28	29	42	26
3 or 4 days a week	10	20	14	17	19	14	16	18	3	18	17	22	13	25
2 days a week	17	19	16	10	7	15	14	16	5	17	12	16	11	20
Once a week	21	18	24	10	8	22	19	16	10	18	22	17	13	13
Once a fortnight	10	6	10	5	2	7	8	5	10	8	8	8	6	4
About once a month	11	4	8	4	1	6	5	3	16	6	7	5	5	6
Less than once a month	8	3	3	5	2	4	5	4	28	3	4	3	7	5
First time	1	1	3	1	2	0	1	2	10	1	2	1	2	1
Weekly mean	**3.3**	**2.5**	**3.3**	**3.6**	**3.4**	**2.8**	**3.1**	**2.7**	**1.5**	**2.8**	**2.7**	**2.7**	**3.3**	**2.5**
Monthly mean	**13.3**	**10.1**	**13.4**	**14.4**	**13.7**	**11.1**	**12.5**	**10.7**	**5.9**	**11.0**	**10.6**	**10.7**	**13.3**	**10.1**
Weighted base	86	79	88	86	87	81	90	76	43	72	75	84	86	79

* = less than 0.5%

Table 104: Frequency of visiting town centre by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
5 or more days a week	40	25	43	49	39	29	34	28	12	34	28	24
3 or 4 days a week	20	14	15	17	25	17	20	19	13	15	17	21
2 days a week	13	19	12	8	14	17	15	12	8	7	15	19
Once a week	13	21	18	12	9	18	21	17	10	16	15	20
Once a fortnight	4	10	4	5	5	8	5	9	7	5	9	5
About once a month	4	6	3	4	3	4	2	6	14	9	9	6
Less than once a month	5	5	4	4	5	6	4	8	26	10	5	4
First time	1	0	*	1	1	1	*	2	10	5	2	1
Weekly mean	**3.3**	**2.5**	**3.3**	**3.6**	**3.4**	**2.8**	**3.1**	**2.7**	**1.5**	**2.8**	**2.7**	**2.7**
Monthly mean	**13.3**	**10.1**	**13.4**	**14.4**	**13.7**	**11.1**	**12.5**	**10.7**	**5.9**	**11.0**	**10.6**	**10.7**
Weighted base	**292**	**292**	**288**	**294**	**288**	**294**	**295**	**293**	**294**	**292**	**311**	**302**

* = less than 0.5%

Average Spend

Table 105: Average spend today by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
Nothing	0	6	6	2	2	3	1	1	2	3	3	2	6	1
Under £5	12	7	7	3	10	4	5	11	7	8	10	6	8	6
£5-£19.99	18	29	27	55	44	33	26	33	17	27	28	34	35	35
£20-£49.99	27	38	35	28	36	37	28	31	16	33	33	36	32	36
£50-£99.99	27	14	15	7	6	20	26	19	25	24	19	17	14	15
£100+	12	4	7	5	3	4	14	4	31	5	5	5	3	5
Mean (£)	**£50**	**£32**	**£36**	**£28**	**£26**	**£35**	**£53**	**£33**	**£79**	**£39**	**£36**	**£34**	**£31**	**£35**

Weighted base[1]	293	298	306	300	293	298	315	306	285	303	294	292	289	287

1. except refused and don't know

Table 106: Average spend today by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
Nothing	4	4	4	12	5	2	7	3	4	0	2	4
Under £5	8	11	8	13	12	10	8	10	3	8	11	12
£5-£19.99	36	29	38	43	39	38	42	28	19	33	33	39
£20-£49.99	35	33	35	25	28	31	35	26	23	28	34	31
£50-£99.99	11	17	11	5	11	15	7	20	22	20	16	11
£100+	6	6	5	2	4	4	1	14	30	10	4	3
Mean (£)	**£33**	**£36**	**£31**	**£20**	**£28**	**£31**	**£23**	**£47**	**£77**	**£44**	**£34**	**£28**
Weighted base[1]	**289**	**283**	**280**	**289**	**290**	**290**	**289**	**283**	**275**	**279**	**304**	**300**

1. except refused and don't know

Table 107: Average spend per visit by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	Wimbledon %	Woolwich %
Nothing	0	1	2	3	1	2	0	1	2	1	1	0	6	1
Under £5	7	5	4	2	11	5	5	8	7	4	7	3	6	4
£5-£19.99	20	31	34	52	58	33	27	36	16	33	34	35	42	37
£20-£49.99	30	43	41	32	24	40	36	37	15	39	36	40	27	39
£50-£99.99	22	12	13	6	3	16	24	12	22	15	15	16	11	15
£100+	7	2	3	4	1	4	6	1	25	5	4	3	3	3
Mean (£)	**£42**	**£29**	**£32**	**£27**	**£19**	**£33**	**£41**	**£28**	**£73**	**£36**	**£32**	**£35**	**£27**	**£32**
Weighted base[1]	**267**	**281**	**308**	**300**	**286**	**294**	**308**	**296**	**258**	**295**	**287**	**287**	**281**	**284**

* = less than 0.5%

1. except refused and don't know

Table 108: Average spend per visit by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
Nothing	1	*	*	5	3	1	1	2	3	2	*	1
Under £5	9	8	5	10	10	8	6	7	3	7	7	9
£5-£19.99	40	30	46	52	46	41	53	33	26	31	35	48
£20-£49.99	35	38	37	28	27	32	30	30	23	34	36	30
£50-£99.99	13	19	10	4	11	15	7	16	24	19	18	9
£100+	3	4	1	2	4	3	3	12	22	7	4	2
Mean (£)	**29**	**36**	**27**	**20**	**26**	**30**	**25**	**41**	**64**	**39**	**35**	**25**
Weighted base[1]	**280**	**273**	**278**	**284**	**285**	**285**	**281**	**259**	**248**	**268**	**298**	**290**

* = less than 0.5%

1. except refused and don't know

Table 109: Average total spend per week by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
Nothing	0	1	2	3	1	2	0	1	2	1	1	0	6	1
Under £5	4	5	6	7	4	4	4	4	9	4	7	4	6	7
£5-£19.99	22	13	18	10	16	14	14	14	28	13	13	13	16	14
£20-£49.99	23	25	34	19	22	33	28	26	23	28	35	28	23	22
£50-£99.99	19	27	22	37	35	24	27	31	14	34	22	27	27	31
£100+	19	22	15	23	18	22	24	18	12	17	19	25	17	23
Mean (£)	**£74**	**£78**	**£61**	**£81**	**£70**	**£71**	**£82**	**£73**	**£55**	**£74**	**£72**	**£86**	**£68**	**£80**
Weighted base[1]	266	281	308	300	286	294	308	296	258	295	287	287	281	284

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

Table 110: Average total spend per week by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
Nothing	1	0	*	5	3	1	1	2	2	2	*	1
Under £5	4	4	5	8	5	7	4	7	9	10	6	4
£5-£19.99	18	21	15	16	21	17	18	16	24	15	18	18
£20-£49.99	24	26	27	30	26	30	31	24	26	23	28	24
£50-£99.99	28	27	25	18	23	24	25	22	10	20	25	28
£100+	21	17	24	19	20	16	15	19	12	22	18	21
Mean (£)	**88**	**68**	**83**	**64**	**79**	**64**	**63**	**77**	**61**	**84**	**72**	**88**
Weighted base[1]	**280**	**275**	**276**	**283**	**283**	**285**	**281**	**260**	**247**	**268**	**298**	**280**

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

Table 111: Average total spend per month by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
Nothing	0	1	2	3	1	2		1	2	1	1	0	6	1
Under £5	0	0	4	1	3	0	1	1	2	1	2	1	1	2
£5-£19.99	3	4	3	5	1	3	3	3	5	2	5	2	4	4
£20-£49.99	10	4	8	4	5	6	6	6	16	5	7	4	8	7
£50-£99.99	18	10	13	8	12	11	11	10	15	12	10	12	12	9
£100+	57	73	69	78	76	77	77	74	46	77	72	78	65	76
Mean (£)	**£295**	**£313**	**£243**	**£325**	**£278**	**£285**	**£330**	**£294**	**£222**	**£294**	**£287**	**£344**	**£271**	**£319**
Weighted base[1]	266	281	308	300	286	294	308	296	258	295	287	287	281	284

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

Table 112: Average total spend per month by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
Nothing	1	0	*	5	3	1	1	2	2	2	*	1
Under £5	1	*	1	1	2	1	1	2	3	3	1	1
£5-£19.99	3	3	3	6	3	5	3	5	6	5	4	6
£20-£49.99	9	10	9	9	5	5	6	9	12	8	9	9
£50-£99.99	11	13	8	9	16	16	13	8	15	10	12	15
£100+	72	68	74	67	69	69	71	64	46	64	69	65
Mean (£)	**353**	**271**	**331**	**258**	**314**	**256**	**254**	**309**	**248**	**338**	**287**	**237**
Weighted base[1]	**280**	**275**	**276**	**283**	**283**	**285**	**281**	**260**	**247**	**268**	**298**	**290**

* = less than 0.5%

1. except refused and don't know

Improvements to town centres

Table 113: Main priority for improvements in each area by town centre 2015

	% Bromley	% Eltham	% Enfield Town	% Hayes	% Harlesden	% Ilford	% Kingston	% Lewisham	% Oxford Street/ Regent Street	% Romford	% Stratford	% Walthamstow	% Wimbledon	% Woolwich
Nothing	21	9	14	9	11	3	32	7	25	15	27	11	21	6
More shops	6	7	11	12	11	8	5	11	3	5	2	16	8	23
Better range of shops	23	44	24	33	35	36	7	26	9	22	9	50	23	51
Improve shops / better quality shops	11	23	18	36	31	34	2	20	10	19	7	36	17	38
Longer shop opening hours	12	10	10	15	7	10	8	7	4	19	7	15	8	16
More leisure facilities	15	19	19	22	16	25	8	25	13	17	9	15	6	22
More pleasant/greener environment	14	20	34	37	24	30	19	29	32	27	23	27	28	10
Cleaner streets	7	14	14	44	42	26	9	32	18	28	19	16	16	20
Reduce pollution	6	8	14	13	16	18	3	19	23	8	10	10	14	5
More public spaces	16	28	22	15	17	19	11	28	22	15	22	18	24	9
Remove undesirable element/more policing	4	10	7	19	27	20	4	10	9	17	19	17	9	21
Less traffic	3	16	17	9	13	19	7	25	22	13	12	8	15	6
High street should be pedestrianised	0	11	3	9	8	8	5	10	9	6	5	2	8	2
Improve pedestrian environment	1	7	9	13	10	10	4	16	13	6	11	6	7	5
More/easier parking	10	11	13	14	14	9	6	7	8	10	3	8	7	7
Better bus service	3	6	7	11	18	11	2	9	8	6	2	4	8	5
Improve access to bus stop locations	*	2	3	4	10	3	1	4	3	2	1	1	2	1
Improve cycle facilities	4	5	3	2	10	3	4	3	5	3	3	3	5	2
Other	10	5	6	2	4	3	5	7	2	4	5	5	6	5
Don't know	5	3	1	1	*	3	1	2	0	*	*	2	1	*
Weighted base	**302**	**304**	**316**	**302**	**294**	**298**	**317**	**311**	**299**	**304**	**297**	**295**	**295**	**289**

* = less than 0.5%

Table 114: Main priority for improvements in each area by town centre 2014

	% Barking	% Bexleyheath	% Clapham Junction	% Clapham Old Town	% Ealing	% Enfield Town	% Hornchurch	% Kingston	% Oxford Street/ Regent Street	% Richmond	% Uxbridge	% Walthamstow
Nothing	5	19	13	18	16	16	16	36	28	21	18	9
More shops	26	17	6	7	9	12	15	5	4	10	8	10
Better range of shops	60	35	25	29	30	30	40	13	6	21	23	35
Improve shops / better quality shops	48	16	11	16	20	26	21	6	2	8	16	25
Longer shop opening hours	14	12	7	8	10	16	8	10	10	10	18	12
More leisure facilities	16	10	8	11	9	11	14	6	12	14	22	18
More pleasant/greener environment	14	13	22	10	10	12	11	10	18	15	15	27
Cleaner streets	37	12	21	19	16	8	14	11	13	17	21	30
Reduce pollution	12	3	18	17	20	12	15	7	23	14	15	15
More public spaces	9	5	15	7	9	11	12	7	17	11	14	16
Remove undesirable element/more policing	15	8	8	6	6	5	8	6	6	6	12	18
Less traffic	10	6	27	27	23	15	23	10	26	29	10	16
High street should be pedestrianised	2	5	8	7	7	6	12	6	13	14	5	9
Improve pedestrian environment	5	9	5	7	6	3	8	4	9	8	5	12
More/easier parking	13	5	7	7	9	7	8	6	5	11	8	8
Better bus service	11	3	11	7	5	7	14	6	7	6	10	10
Improve access to bus stop locations	3	2	4	2	2	4	2	1	1	4	2	6
Improve cycle facilities	4	4	8	9	5	2	2	3	3	5	5	9
Other	11	12	5	5	5	2	8	4	7	6	3	10
Don't know	2	5	2	1	1	1	1	3	2	1	2	3
Weighted base	**292**	**292**	**288**	**294**	**288**	**294**	**295**	**293**	**294**	**292**	**311**	**302**

* = less than 0.5%

Shaded boxes indicate top mentions in each town centre

Table 115: Ratings of different urban realm aspects – mean scores by town centre 2015

	Bromley	Eltham	Enfield Town	Hayes	Harlesden	Ilford	Kingston	Lewisham	Oxford Street/ Regent Street	Romford	Stratford	Walthamstow	Wimbledon	Woolwich
Ease of cycling	4.96	4.19	5.45	6.28	6.42	5.44	6.32	3.51	5.45	5.14	4.76	5.36	4.84	5.02
Trees and plants	6.41	3.98	5.76	6.32	6.25	5.59	6.41	3.26	5.68	5.31	6.03	5.76	5.30	6.42
Traffic noise	6.48	4.43	5.53	6.58	6.30	5.16	6.49	3.94	5.42	5.67	5.44	6.27	4.64	6.28
Seating areas	6.30	4.00	5.58	6.45	6.74	6.07	7.01	3.63	6.15	6.34	4.98	5.41	5.47	6.95
Air quality	6.62	5.44	5.80	6.56	6.67	5.22	6.91	4.30	5.97	5.98	5.50	5.92	5.47	5.82
A relaxing place to be	6.57	5.61	6.37	6.47	6.53	5.46	6.99	4.16	6.15	6.03	5.51	5.89	5.97	5.38
Litter	7.37	6.62	6.70	6.23	6.27	5.84	7.42	4.97	6.44	6.21	5.85	5.79	6.37	5.56
Attractiveness	7.08	5.75	7.14	6.54	6.77	5.80	7.47	4.56	7.49	6.33	6.30	6.47	6.98	4.98
Pavement condition	7.72	6.26	7.09	6.38	7.05	6.22	7.02	4.68	7.17	5.92	5.93	6.31	6.73	5.80
Ease of crossing the main road	7.80	7.49	6.97	6.85	6.73	6.20	7.51	4.46	6.83	6.70	6.71	6.86	7.11	7.19
Graffiti and fly posting	7.84	6.99	7.40	6.89	6.59	6.21	7.73	5.59	7.34	6.79	7.17	6.85	7.22	6.63
Ease of walking around	7.99	7.36	7.20	7.10	6.98	6.37	7.75	5.47	6.96	6.95	6.73	6.87	7.43	7.38
Mean	**6.93**	**5.68**	**6.42**	**6.55**	**6.61**	**5.80**	**7.09**	**4.38**	**6.42**	**6.11**	**5.91**	**6.15**	**6.13**	**6.12**

Green boxes indicate top ratings and red bottom ratings in each town centre

Table 116: Ratings of different urban realm aspects – mean scores by town centre 2014

	Barking	Oxford Street/ Regent Street	Walthamstow	Ealing	Clapham Junction	Hornchurch	Clapham Old Town	Bexleyheath	Enfield Town	Uxbridge	Richmond	Kingston
Traffic noise	5.94	3.55	5.87	4.47	4.84	4.89	5.28	5.69	5.81	6.01	4.81	6.14
Air quality	5.75	4.40	5.20	4.95	5.20	5.79	5.61	5.95	6.21	6.32	5.79	6.42
Seating areas	5.27	4.30	5.16	4.97	5.61	6.10	5.64	6.65	5.67	6.58	5.33	6.34
A relaxing place to be	4.77	4.84	5.55	5.55	5.81	6.12	6.41	5.90	6.38	6.47	6.77	6.70
Trees and plants	5.25	4.74	5.34	6.32	5.69	6.20	7.08	6.86	6.12	6.18	6.07	6.72
Litter	4.74	7.23	5.17	6.19	6.73	6.63	6.35	6.37	6.93	6.34	7.24	7.15
Attractiveness	4.61	6.88	5.70	6.25	6.81	6.65	7.17	6.39	6.79	6.79	7.75	7.52
Pavement condition	6.06	6.80	5.74	5.50	7.22	7.00	7.01	7.26	6.84	6.55	7.10	6.78
Ease of crossing the main road	6.91	6.49	6.59	6.38	6.61	6.85	6.44	6.22	7.05	6.93	7.06	7.68
Ease of walking around	7.06	6.51	6.79	6.80	7.32	7.38	7.22	7.51	7.28	7.31	7.59	7.86
Graffiti and fly posting	6.58	7.72	6.35	7.03	7.21	7.39	7.22	7.46	7.40	7.09	7.87	7.99
Mean	**5.72**	**5.77**	**5.77**	**5.86**	**6.28**	**6.45**	**6.49**	**6.57**	**6.59**	**6.60**	**6.67**	**7.03**

Green boxes indicate top ratings and red bottom ratings in each town centre

APPENDIX C

Response and Weighting Factors

Response and Weighting Factors

Response

In 2014 the total number of interviews was 3,536 (an average of 295 in each area). In 2014 the total number of interviews was 4,224 (an average of 302 in each area).

Weighting factors

In order to reflect the distribution of the results by day as achieved in earlier phases of the Town Centres research the data were weighted so that 70% of the results were from weekdays, 20% from Saturdays and 10% from Sundays. The unweighted bases in 2014 were 70% weekday, 22% Saturday and 8% Sunday, in 2015 they were 75% weekday, 19% Saturday and 7% Sunday.

Values used for calculating average spend:

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

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

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

APPENDIX D

Cycle Booster Key Results

Demographics

Table 117: Gender by town centre 2014

	Total	Location						
		Barking	Enfield Town	Kingston	Oxford St/ Regent St	Richmond	Uxbridge	Waltham-stow
	%	%	%	%	%	%	%	%
Male	66	85	47	49	71	68	74	69
Female	34	15	53	51	29	32	26	31
Base	**372**	**47**	**45**	**69**	**49**	**60**	**47**	**55**

Table 118: Gender by town centre 2015

	Total	Location						
		Enfield Town	Kingston	Lewisham	Oxford St/ Regent St	Waltham-stow	Wimble-don	Woolwich
	%	%	%	%	%	%	%	%
Male	64	66	54	69	69	63	62	70
Female	36	34	46	31	31	38	38	30
Base	**355**	**50**	**63**	**49**	**48**	**48**	**50**	**47**

Table 119: Age by town centre 2014

	Total	Location						
		Barking	Enfield Town	Kingston	Oxford St/ Regent St	Richmond	Uxbridge	Waltham-stow
	%	%	%	%	%	%	%	%
16-24	15	15	4	17	12	17	28	13
25-34	23	32	24	6	29	27	19	33
35-44	21	32	16	16	27	18	23	18
45-54	18	9	22	16	22	28	9	18
55-59	9	4	11	13	8	5	11	9
60-64	7	4	16	17	2	3	2	2
65-74	4	4	7	12				2
75 or over	3			3		2	9	5
Base	**372**	**47**	**45**	**69**	**49**	**60**	**47**	**55**

Table 120: Age by town centre 2015

	Total	Location						
		Enfield Town	Kingston	Lewisham	Oxford St/ Regent St	Waltham-stow	Wimble-don	Woolwich
	%	%	%	%	%	%	%	%
16-24	12	18	10	10	6	8	18	17
25-34	31	22	17	31	50	29	38	32
35-44	26	24	24	24	33	31	20	26
45-54	19	20	22	20	10	27	16	17
55-59	4	6	3	4		4	6	4
60-64	3	4	8	6				4
65-74	3	2	14	2			2	
75 or over	1	4	2	2				
Base	**355**	**50**	**63**	**49**	**48**	**48**	**50**	**47**

Table 121: Ethnicity by town centre 2014

	Total	Location						
		Barking	Enfield Town	Kingston	Oxford St/ Regent St	Richmond	Uxbridge	Waltham-stow
	%	%	%	%	%	%	%	%
White	77	53	80	90	63	78	85	80
Asian or Asian British	9	19	7	6	8	5	13	9
Black or Black British	9	17	11	1	16	8	2	7
Mixed	3	9		1	4	5		4
Chinese or other ethnic background	2		2	1	6	2		
Base	**372**1	**47**	**45**	**69**	**49**	**60**	**47**	**55**

Table 122: Ethnicity by town centre 2015

	Total %	Location Enfield Town %	Kingston %	Lewisham %	Oxford St/ Regent St %	Waltham-stow %	Wimble-don %	Woolwich %
White	72	84	81	59	79	65	66	64
Asian or Asian British	7	8	5	6	8	4	12	9
Black or Black British	16	4	11	29	8	23	20	21
Mixed	2	2	2	2	4	2	2	2
Chinese or other ethnic background	2	2	2	2		4		4
Base	**355**	**50**	**63**	**49**	**48**	**48**	**50**	**47**

Table 123: Employment Status by town centre 2014

	Total %	Location Barking %	Enfield Town %	Kingston %	Oxford St/ Regent St %	Richmond %	Uxbridge %	Waltham-stow %
Working full time (30+ hours a week)	54	62	49	39	78	62	38	53
Working part time (less than 30 hours a week)	16	11	29	17	8	18	6	20
A full time student	10	4	2	13	10	2	28	9
A part time student	1		4			3		2
Not working, but looking for work	5	11			2	5	15	2
Not working and not looking for work	3	11		1		5	2	5
Retired	10	2	13	26	2	3	11	7
Looking after family and home	1		2	3				2
Other	0					2		
Base	**372**	**47**	**45**	**69**	**49**	**60**	**47**	**55**

Table 124: Employment Status by town centre 2015

	Total %	Location Enfield Town %	Kingston %	Lewisham %	Oxford St/ Regent St %	Waltham-stow %	Wimble-don %	Woolwich %
Working full time (30+ hours a week)	64	74	54	67	79	60	58	60
Working part time (less than 30 hours a week)	13	6	11	12	17	15	20	11
A full time student	7	10	5	6	2	13	8	9
A part time student	1		2		2		4	2
Not working, but looking for work	5		2	4		8	6	15
Not working and not looking for work	1	2				4		2
Retired	6	8	21	4			2	2
Looking after family and home	1		5				2	
Other	1		2	6				
Base	**355**	**50**	**63**	**49**	**48**	**48**	**50**	**47**

Table 125: Income by town centre 2014

	Total %	Location Barking %	Enfield Town %	Kingston %	Oxford St/ Regent St %	Richmond %	Uxbridge %	Waltham-stow %
Under £5,000	3	11		4			9	
£5,000-£9,999	2		2			3	13	
£10,000-£14,999	6	4	2	1	8	3	11	13
£15,000-£19,999	6	4	2	6	4	3	9	13
£20,000-£24,999	7	11	7	9		5	13	7
£25,000-£34,999	10	13	22	9		3	15	11
£35,000-£49,999	9	17	7	17	4	2	9	5
£50,000-£74,999	8	9	16	16	6		2	5
£75,000-£99,999	4		7	3	12	5	2	2
£100,000 or over	4		9	3	12	3		4
Don't know	34	28	27	32	49	47	17	36
Refused	6	4			4	24	2	4
Base	**371**	**47**	**45**	**69**	**49**	**59**	**47**	**55**

Table 126: Income by town centre 2015

	Total %	Location: Enfield Town %	Kingston %	Lewisham %	Oxford St/ Regent St %	Waltham-stow %	Wimble-don %	Woolwich %
Under £5,000	1	2		4				4
£5,000-£9,999	1			2			2	
£10,000-£14,999	1	2	3	2			2	
£15,000-£19,999	6	12	2	6	13	4	4	2
£20,000-£24,999	11	12	6	24	8	6	12	11
£25,000-£34,999	8	12	3	14	6	4	10	4
£35,000-£49,999	10	8		8	15	15	12	17
£50,000-£74,999	7	4	10	6	4	6	8	9
£75,000-£99,999	3	4	8	4		2		2
£100,000 or over	2		6		2	4		
Don't know	49	44	62	29	52	56	48	49
Refused	1					2	2	2
Base	**355**	**50**	**63**	**49**	**48**	**48**	**50**	**47**

Table 127: Number of people in household by town centre 2014

	Total %	Location: Barking %	Enfield Town %	Kingston %	Oxford St/ Regent St %	Richmond %	Uxbridge %	Waltham-stow %
One	20	26	11	26	10	14	32	20
Two	35	23	38	35	33	42	30	38
Three	19	19	27	20	12	20	19	18
Four	16	28	11	10	31	17	11	9
Five	5		13	4	8	7	4	2
Six or more	4	2		4	4		4	13
Refused	1	2			2			
Base	**371**	**47**	**45**	**69**	**49**	**59**	**47**	**55**

Table 128: Number of people in household by town centre 2015

	Total %	Location: Enfield Town %	Kingston %	Lewisham %	Oxford St/ Regent St %	Waltham-stow %	Wimble-don %	Woolwich %
One	16	24	24	14	8	19	8	15
Two	26	26	32	45	15	21	24	19
Three	25	22	24	20	40	10	36	26
Four	24	20	11	16	33	29	24	36
Five	6	8	6	4	4	13	6	4
Six or more	2		3			8	2	
Base	**355**	**50**	**63**	**49**	**48**	**48**	**50**	**47**

Table 129: Access to a car by town centre 2014

	Total %	Location: Barking %	Enfield Town %	Kingston %	Oxford St/ Regent St %	Richmond %	Uxbridge %	Waltham-stow %
Yes, but used another mode	51	40	64	80	39	59	11	51
No, no access to a car or van	49	60	36	20	61	41	87	49
Base	**371**	**47**	**45**	**69**	**49**	**59**	**47**	**55**

Table 130: Access to a car by town centre 2015

	Total	Location						
		Enfield Town	Kingston	Lewisham	Oxford St/ Regent St	Waltham-stow	Wimble-don	Woolwich
	%	%	%	%	%	%	%	%
Yes, but used another mode	45	42	65	35	42	46	38	40
No, no access to a car or van	55	58	35	65	58	54	62	60
Base	**355**	**50**	**63**	**49**	**48**	**48**	**50**	**47**

Table 131: Mobility by town centre 2014

	Total	Location						
		Barking	Enfield Town	Kingston	Oxford St/ Regent St	Richmond	Uxbridge	Waltham-stow
	%	%	%	%	%	%	%	%
No, none	97	94	96	99	98	98	96	100
Mobility impairment	1		2	1	2			
Hearing impairment	0						2	
Learning disability	0					2		
Mental health condition	1	4						
Serious long term illness	1	2	2				2	
Base	**372**	**47**	**45**	**69**	**49**	**60**	**47**	**55**

Table 132: Mobility by town centre 2015

	Total	Location						
		Enfield Town	Kingston	Lewisham	Oxford St/ Regent St	Waltham-stow	Wimble-don	Woolwich
	%	%	%	%	%	%	%	%
No, none	97	100	95	96	100	94	100	94
Mobility impairment	1		2	2		4		2
Hearing impairment	1		2	2				
Learning disability	0					2		
Mental health condition	0		2					
Serious long term illness	0							2
Other	0							2
Base	**355**	**50**	**63**	**49**	**48**	**48**	**50**	**47**

Table 133: Whether carrying anything by town centre 2014

	Total	Location						
		Barking	Enfield Town	Kingston	Oxford St/ Regent St	Richmond	Uxbridge	Waltham-stow
	%	%	%	%	%	%	%	%
Shopping bag(s)/shopping trolley	34	34	27	36	49	22	51	25
Carrying a child/baby	0							2
Suitcase/rucksack	31	17	31	29	24	47	21	40
Other large/awkward object	1	6		1				
Nothing	38	49	47	33	27	35	38	40
Base	**372**	**47**	**45**	**69**	**49**	**60**	**47**	**55**

Table 134: Whether carrying anything by town centre 2015

	Total	Location						
		Enfield Town	Kingston	Lewisham	Oxford St/ Regent St	Waltham-stow	Wimble-don	Woolwich
	%	%	%	%	%	%	%	%
Shopping bag(s)/shopping trolley	31	14	49	31	17	33	48	19
Carrying a child/baby	0						2	
Suitcase/rucksack	34	10	25	24	81	38	26	40
Other large/awkward object	12	2	21	18		15	4	21
Nothing	25	74	10	29	8	15	22	19
Base	**355**	**50**	**63**	**49**	**48**	**48**	**50**	**47**

Purpose of visit

Table 135: Main purpose mentioned for visiting the town centre by town centre 2014

		Location						
	Total %	Barking %	Enfield Town %	Kingston %	Oxford St/ Regent St %	Richmond %	Uxbridge %	Waltham-stow %
Shopping	57	51	58	74	49	28	66	75
Using service	14	30	18	10	2	13	11	16
Eating/drinking out	8	6	7	1	2	34		4
Work here	8	2	7	4	22	7	9	5
Using public amenity	4	2	2	1	12	5	4	
Other social/leisure	2		2	1		7		
Personal business	2		2	1	2	3	9	
Live here	2	4	4		4			
General recreation	1			1	2			
Visiting friends and relatives	1	2		1		3	2	
Delivering goods	0	2						
Window shopping	0			1				
Travelling through the area	0				2			
Other	1			1	2			
Base	**374**	**47**	**45**	**70**	**49**	**61**	**47**	**55**

Table 136: Main purpose mentioned for visiting the town centre by town centre 2015

		Location						
	Total %	Enfield Town %	Kingston %	Lewisham %	Oxford St/ Regent St %	Waltham-stow %	Wimble-don %	Woolwich %
Shopping	58	50	60	65	60	58	52	62
Using service	10	12	6	8	4	13	14	17
Eating/drinking out	8	10	10	16			14	2
Work here	6	8	3		27	2	2	2
Other social/leisure	5		8	2	4	6	8	2
Using public amenity	3	2	2	6		8	2	4
General recreation	3	2	6		2	4		6
Visiting friends and relatives	3	12	3	2				
Personal business	2					6	8	2
Window shopping	1		2		2			
Live here	1	2						2
Other	1	2				2		
Base	**355**	**50**	**63**	**49**	**48**	**48**	**50**	**47**

Frequency of visiting centre

Table 137: Frequency of visiting town centre by town centre 2014

		Location						
	Total %	Barking %	Enfield Town %	Kingston %	Oxford St/ Regent St %	Richmond %	Uxbridge %	Waltham-stow %
5 or more days a week	30	36	16	30	22	26	45	36
3 or 4 days a week	19	21	22	23	6	11	30	20
2 days a week	15	19	31	10	6	11	13	20
Once a week	16	13	16	17	16	16	9	20
Once a fortnight	9	9	9	7	14	16		4
About once a month	9	2	4	9	27	13	4	
Less than once a month	2			4	4	5		
First time	1		2		4			
Weekly mean	**2.8**	**3.3**	**2.5**	**2.9**	**1.8**	**2.3**	**3.9**	**3.3**
Base	**374**	**47**	**45**	**70**	**49**	**61**	**47**	**55**

Table 138: Frequency of visiting town centre by town centre 2015

		Location						
	Total %	Enfield Town %	Kingston %	Lewisham %	Oxford St/ Regent St %	Waltham-stow %	Wimble-don %	Woolwich %
5 or more days a week	17	12	5	14	35	27	10	21
3 or 4 days a week	16	26	17	20	10	10	14	11
2 days a week	18	14	16	16	10	23	26	19
Once a week	22	26	29	27	10	17	24	17
Once a fortnight	11	10	17	8	2	10	10	15
About once a month	8	8	10	10	10	4	8	6
Less than once a month	7	4	6	2	19	4	8	9
First time	1			2	2			2
Weekly mean	**2.2**	**2.2**	**1.6**	**2.1**	**2.7**	**2.5**	**1.9**	**2.2**
Base	**355**	**50**	**63**	**49**	**48**	**48**	**50**	**47**

Average Spend

Table 139: Average spend today by town centre 2014

		Location						
	Total %	Barking %	Enfield Town %	Kingston %	Oxford St/ Regent St %	Richmond %	Uxbridge %	Waltham-stow %
Nothing	6	4	9	7	2	5	4	7
Under £1	0	2						
£1-£4.99	8	6	11	3		16	11	9
£5-£9.99	14	21	7	7	10	10	19	29
£10-£14.99	16	21	18	13	14	10	15	20
£15-£19.99	9	15	4	10	6	5	17	7
£20-£29.99	15	9	20	16	8	20	17	13
£30-£49.99	14	9	18	23	16	15	6	5
£50-£74.99	9	6	4	14	16	8	4	4
£75-£99.99	3	2	4		10	3	2	
£100-£149.99	3	2	4		8		2	4
£150-£199.99	1				4			
£200+	2	2		7	2	2		
Don't know	2				2	5	2	2
Mean (£)	**31.59**	**25.89**	**28.17**	**42.05**	**54.38**	**27.63**	**21.03**	**18.75**
Std. Deviation	40.63	38.25	29.84	54.47	50.44	34.36	23.4	25.01
Base	367	**47**	**45**	**70**	**49**	**61**	**47**	**55**

Table 140: Average spend today by town centre 2015

	Total	Location						
	Total %	Enfield Town %	Kingston %	Lewisham %	Oxford St/ Regent St %	Waltham-stow %	Wimble-don %	Woolwich %
Nothing	8	8	3	6	19	17	4	4
Under £1	0	2						
£1-£4.99	6	4	5	10	8	10	2	6
£5-£9.99	13	6	10	22	15	13	16	13
£10-£14.99	11	4	11	20	2	17	10	13
£15-£19.99	9	26	8	2	2	4	8	13
£20-£29.99	18	22	17	20	13	13	22	17
£30-£49.99	15	18	19	10	17	10	12	21
£50-£74.99	12	6	19	4	17	15	14	4
£75-£99.99	3	2	3		2	2	10	4
£100-£149.99	2		3	2	4			2
£150-£199.99	0				2			
£200+	1		2				2	
Don't know	1	2		2				2
Mean (£)	**29.07**	**24.32**	**37.84**	**19.58**	**32.85**	**22.29**	**36.21**	**27.37**
Std. Deviation	30.49	18.35	36.57	21.54	37.59	23.13	37.7	25.14
Base	352	49	63	48	48	48	50	46

Table 141: Average spend per visit by town centre 2014

	Total	Location						
	Total %	Barking %	Enfield Town %	Kingston %	Oxford St/ Regent St %	Richmond %	Uxbridge %	Waltham-stow %
Nothing	1	4	2					2
Under £1	5	4		3	4	7	9	9
£1-£4.99	19	26	11	11	16	18	32	20
£5-£9.99	18	19	18	16	12	15	23	22
£10-£14.99	12	13	9	24	6	7	11	13
£15-£19.99	15	6	20	16	8	18	17	18
£20-£29.99	11	17	16	16	8	8	6	9
£30-£49.99	7	6	13	4	14	10		5
£50-£74.99	3	2	4	1	12	2		
£75-£99.99	2		2	1	8			
£100-£149.99	1				4			
£150-£199.99	1	2		1				
£200+	5		4	6	6	15	2	2
Don't know	1	4	2					2
Mean (£)	**27.18**	**25.71**	**32.27**	**27.89**	**49.26**	**23.81**	**14.55**	**18.66**
Std. Deviation	30.22	35.37	26.36	31.9	46.34	20.17	9.64	14.96
Base	353	47	43	66	46	51	46	54

Table 142: Average spend per visit by town centre 2015

	Total	Location						
		Enfield Town	Kingston	Lewisham	Oxford St/ Regent St	Waltham-stow	Wimble-don	Woolwich
	%	%	%	%	%	%	%	%
Nothing	6	6		4	25	10		
£1-£4.99	6	6	2	12	8	4	4	9
£5-£9.99	12	8	8	18	8	15	16	13
£10-£14.99	12	12	6	18	4	21	8	17
£15-£19.99	11	16	13	8	8	10	14	6
£20-£29.99	19	24	19	22	8	10	24	21
£30-£49.99	17	24	24	10	19	17	16	11
£50-£74.99	9	2	16	2	4	10	10	15
£75-£99.99	3		6		8		4	
£100-£149.99	2		3		2	2	4	2
Don't know	3	2	3	4	4			6
Mean (£)	**27.32**	**22.38**	**38.61**	**17.14**	**26.02**	**24.03**	**31.92**	**27.77**
Std. Deviation	24.78	14.22	27.34	13.33	30.41	23.91	28.1	24.51
Base	345	49	61	47	46	48	50	44

Table 143: Average total spend per week by town centre 2014

	Total	Location						
		Barking	Enfield Town	Kingston	Oxford St/ Regent St	Richmond	Uxbridge	Waltham-stow
	%	%	%	%	%	%	%	%
Nothing	1	4	2					2
Under £5	3		4	1	8	5		
£5-£19.99	24	21	11	27	24	34	21	24
£20-£49.99	33	32	31	20	41	28	49	40
£50-£99.99	23	26	29	37	8	13	21	22
£100+	10	17	18	9	12	3	6	11
Don't know	5		4	6	6	15	2	2
Mean (£)	**54.95**	**63.69**	**75.96**	**55.34**	**47.35**	**37.12**	**52.36**	**55.66**
Std. Deviation	63.84	62.17	110.02	49.8	55.7	43.95	44.9	64.17
Base	353	47	43	66	46	51	46	54

Table 144: Average total spend per week by town centre 2015

	Total	Location						
		Enfield Town	Kingston	Lewisham	Oxford St/ Regent St	Waltham-stow	Wimble-don	Woolwich
	%	%	%	%	%	%	%	%
Nothing	6	6		4	25	10		
Under £5	6	8	5	10	10	2	4	4
£5-£19.99	19	20	14	29	19	17	16	21
£20-£49.99	31	30	44	33	21	31	34	19
£50-£99.99	21	28	27	16	13	23	18	23
£100+	13	6	6	4	8	17	28	26
Don't know	3	2	3	4	4			6
Mean (£)	**54.55**	**44.09**	**47.01**	**35.03**	**41.82**	**68.32**	**72.57**	**75.32**
Std. Deviation	66.87	43.92	39.41	41.02	80.21	84.28	79.51	78.29
Base	345	49	61	47	46	48	50	44

Table 145: Average total spend per month by town centre 2014

	Total	Location						
		Barking	Enfield Town	Kingston	Oxford St/ Regent St	Richmond	Uxbridge	Waltham-stow
	%	%	%	%	%	%	%	%
Nothing	1	4	2					2
£5-£19.99	2		4	1	6	5		
£20-£49.99	7	4		11	10	11	4	4
£50-£99.99	20	19	11	17	24	25	17	22
£100+	64	72	78	64	53	43	77	71
Don't know	5		4	6	6	15	2	2
Mean (£)	**219.97**	**254.78**	**303.84**	**222.01**	**189.74**	**148.49**	**209.46**	**222.65**
Std. Deviation	255.24	248.67	440.09	198.69	222.58	175.78	179.61	256.7
Base	353	47	43	66	46	51	46	54

Table 146: Average total spend per month by town centre 2015

	Total	Location						
		Enfield Town	Kingston	Lewisham	Oxford St/ Regent St	Waltham-stow	Wimble-don	Woolwich
	%	%	%	%	%	%	%	%
Nothing	6	6		4	25	10		
Under £5	1			4				2
£5-£19.99	4	6	2	6	6	2	4	2
£20-£49.99	8	12	8	8	10	6	6	9
£50-£99.99	15	12	16	24	17	10	12	13
£100+	63	62	71	49	38	71	78	68
Don't know	3	2	3	4	4			6
Mean (£)	**218.33**	**176.48**	**188.19**	**140.15**	**167.82**	**273.29**	**290.33**	**301.27**
Std. Deviation	267.4	175.58	157.51	164.06	320.6	337.11	317.98	313.16
Base	353	47	43	66	46	51	46	54

Improvements to town centres

Table 147: Main priority for improvements in each area by town centre 2014

	Total	Location						
		Barking	Enfield Town	Kingston	Oxford St/ Regent St	Richmond	Uxbridge	Waltham-stow
	%	%	%	%	%	%	%	%
More shops	8	32	7	1		5	6	11
Better range of shops	21	34	44	10	12	13	17	27
Improve shops/better quality shops	16	17	16	6	10	15	26	24
Longer shop opening hours	7	13	2	6	10	7	9	5
More leisure facilities	20	19	11	4	29	30	32	18
More pleasant/greener environment	19	9	18	16	35	28	21	7
Cleaner streets	22	36	11	11	20	30	40	11
Reduce pollution	23	38	16	17	43	34	11	4
More public spaces	16	11	4	4	33	31	23	7
Remove undesirable element/more policing	8	2	2	6	20	13	11	2
Less traffic	20	13	13	11	49	26	21	9
High street should be pedestrianised	12	11	22	6	18	16	11	2
Improve pedestrian environment	10	11	2	7	22	11	13	4
More/easier parking	7	2	11	9	10	7	11	2
Better bus service	6	9	4	3	12	3	13	2
Improve access to bus stop locations	3			1	4	3	13	
Improve cycle facilities	34	19	20	19	39	48	62	38
Other	7	9	11	4		10	9	7
Nothing	18		13	43	22	16	11	11
Don't know	1		2			2	2	4
Base	**362**	**47**	**45**	**70**	**49**	**61**	**47**	**55**

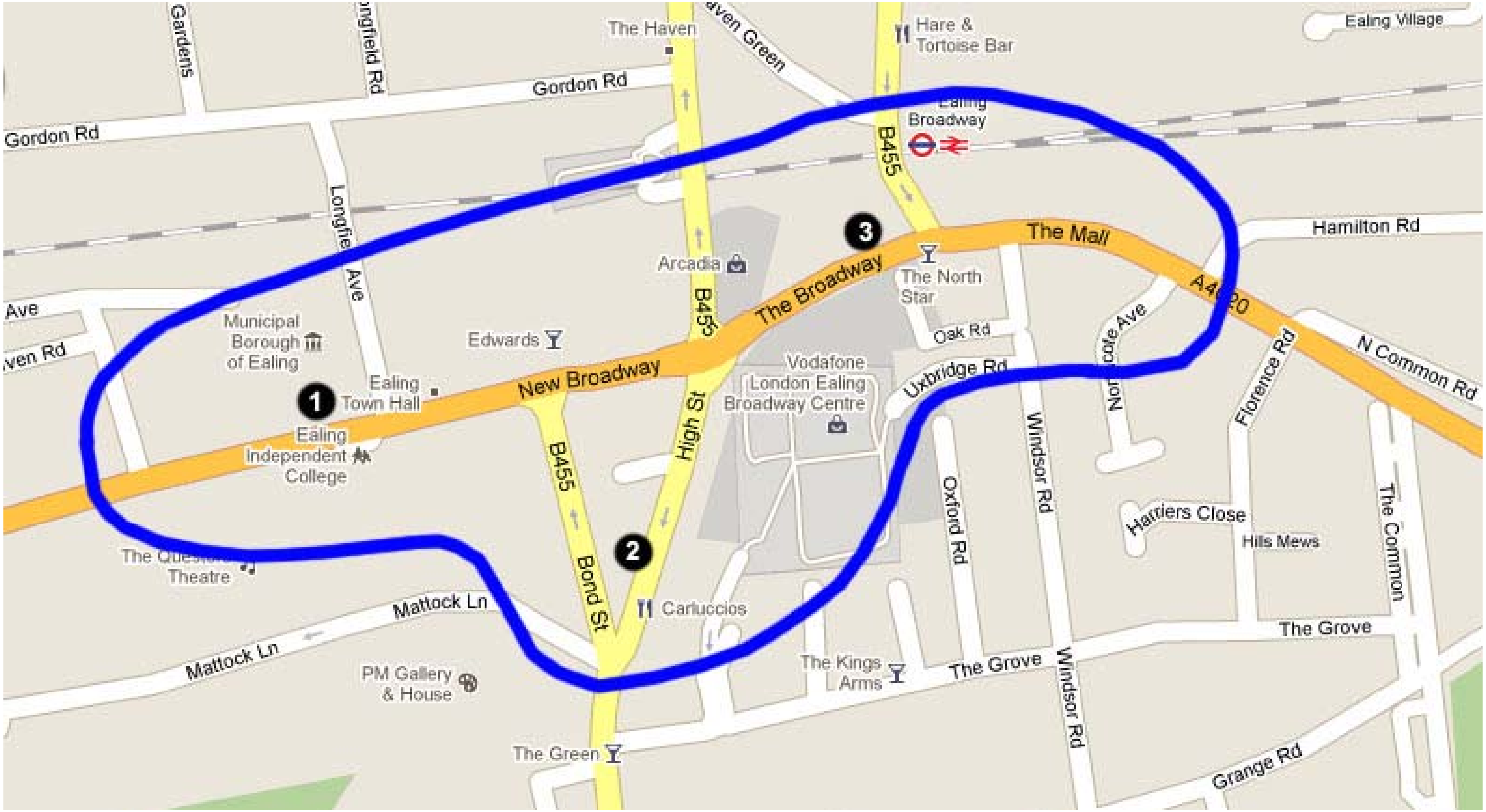
Table 148: Main priority for improvements in each area by town centre 2015

	Total	Location						
		Enfield Town	Kingston	Lewisham	Oxford St/ Regent St	Waltham-stow	Wimble-don	Woolwich
	%	%	%	%	%	%	%	%
More shops	6	6		6	4	4	14	11
Better range of shops	29	26	13	16	13	42	44	53
Improve shops/better quality shops	25	18	13	24	23	27	40	30
Longer shop opening hours	14	26	3	6	6	23	30	9
More leisure facilities	24	14	24	27	6	25	38	34
More pleasant/greener environment	31	18	33	31	48	25	32	28
Cleaner streets	22	12	17	37	17	19	16	38
Reduce pollution	24	20	29	16	31	29	18	21
More public spaces	19	6	17	18	33	17	28	13
Remove undesirable element/more policing	17	2	8	10	27	35	22	21
Less traffic	24	16	30	39	23	15	30	13
High street should be pedestrianised	12	4	5	16	23	6	24	9
Improve pedestrian environment	13	8	14	16	13	4	22	11
More/easier parking	9	6	17		4	4	26	4
Better bus service	9		17	6	4	4	16	11
Improve access to bus stop locations	2		3	2		4	2	2
Improve cycle facilities	33	20	44	20	52	38	34	21
Other	4	2	5	6		6	2	6
Nothing	7	14	11	2		10	4	6
Don’t know	1			2		2		
Base	**355**	**50**	**63**	**49**	**48**	**48**	**50**	**47**

Appendix E

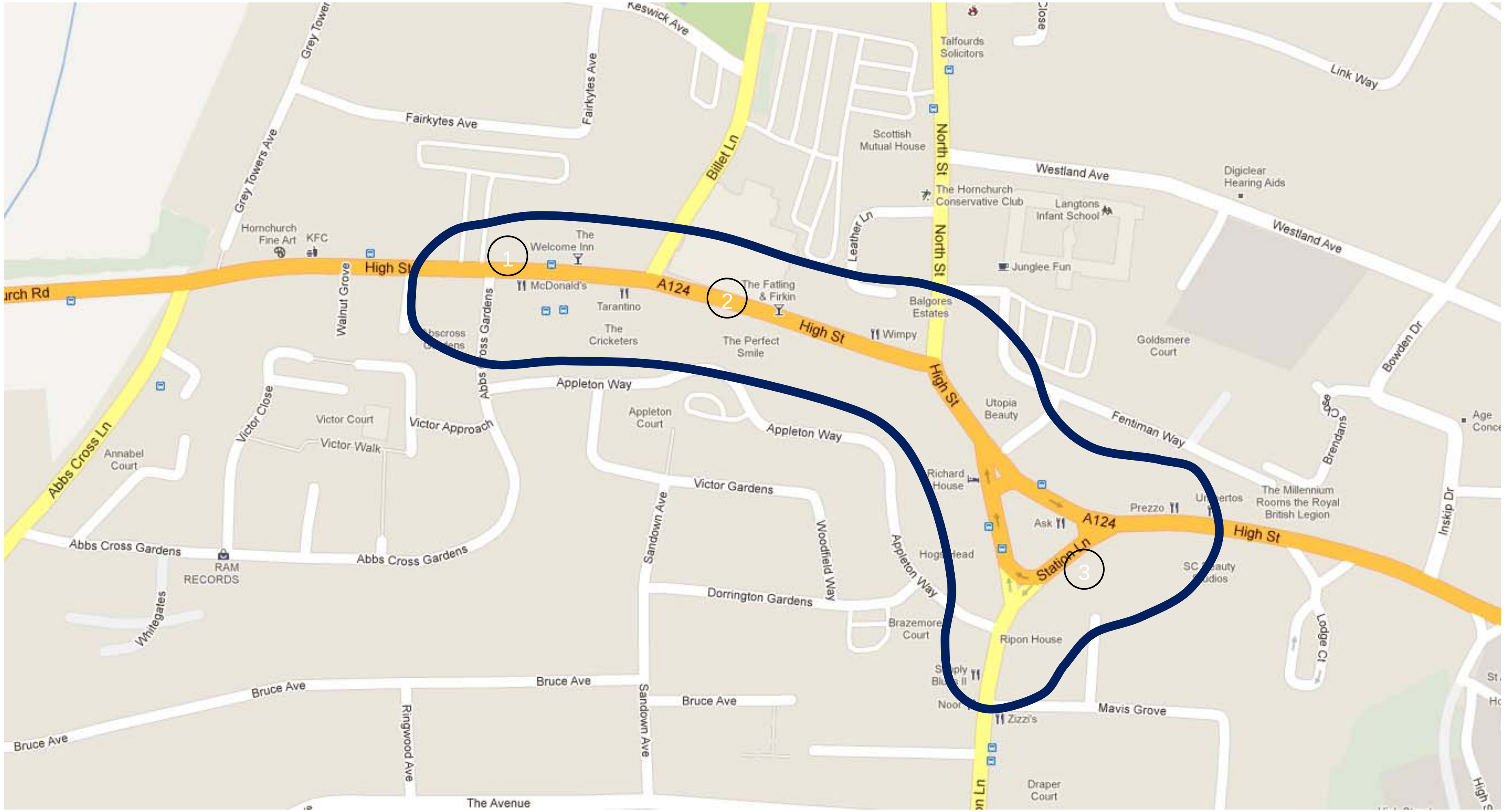
Town Centre Maps

Ealing



Gordon Rd
Gordon Rd
The Haven
Hare & Tortoise Bar
Ealing Village
Ealing Broadway
B455
Hamilton Rd
The Mall
A4020
N Common Rd
The Broadway
The North Star
Oak Rd
Arcadia
Municipal Borough of Ealing
Edwards
New Broadway
Ealing Town Hall
Vodafone London Ealing Broadway Centre
Uxbridge Rd
Ealing Independent College
High St
B455
Bond St
Oxford Rd
Windsor Rd
Florence Rd
Harriers Close
Hills Mews
The Common
Theatre
Mattock Ln
Mattock Ln
Carluccios
The Kings Arms
The Grove
The Grove
PM Gallery & House
The Green
Grange Rd
1
2
3

Hornchurch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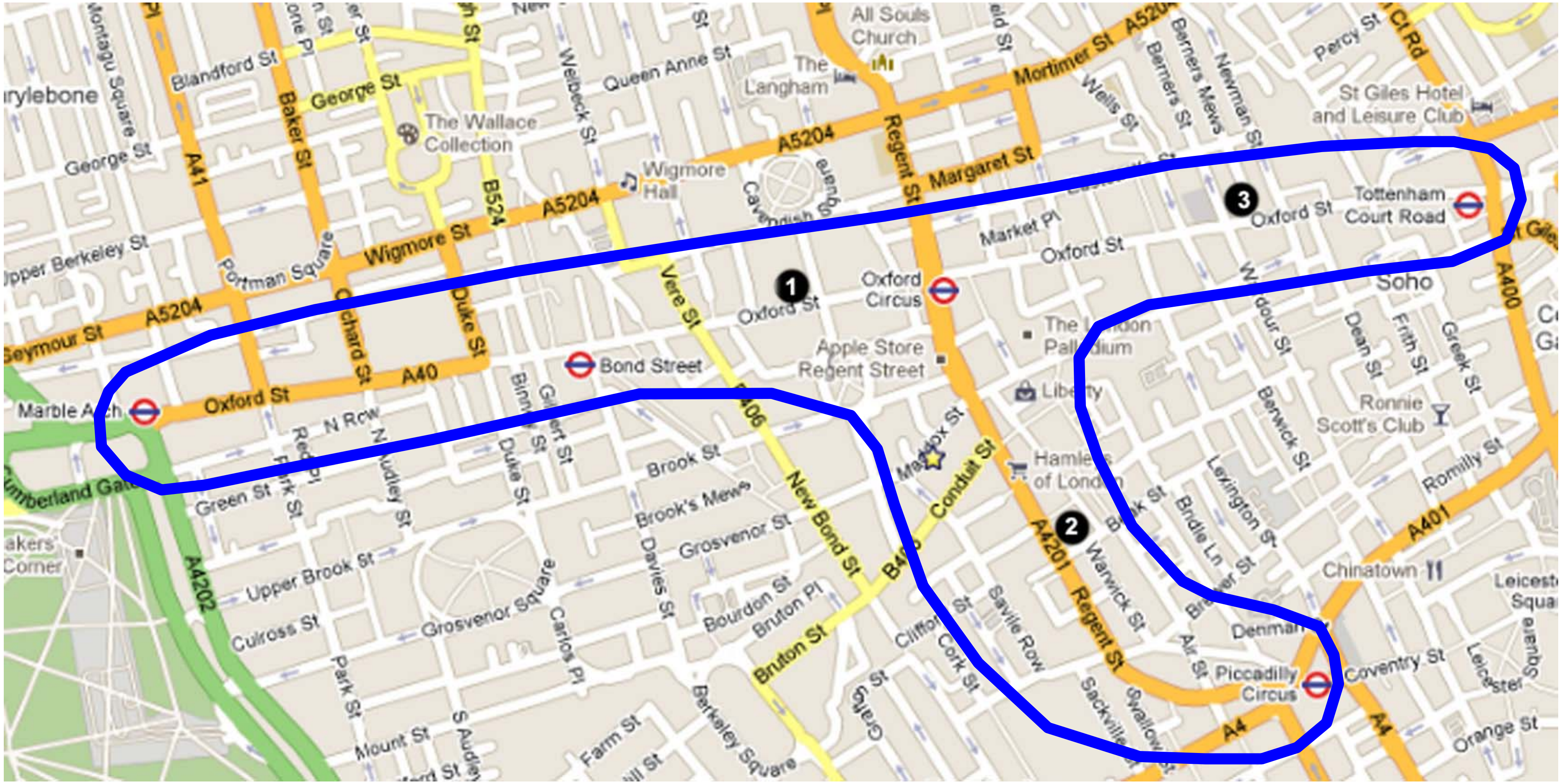
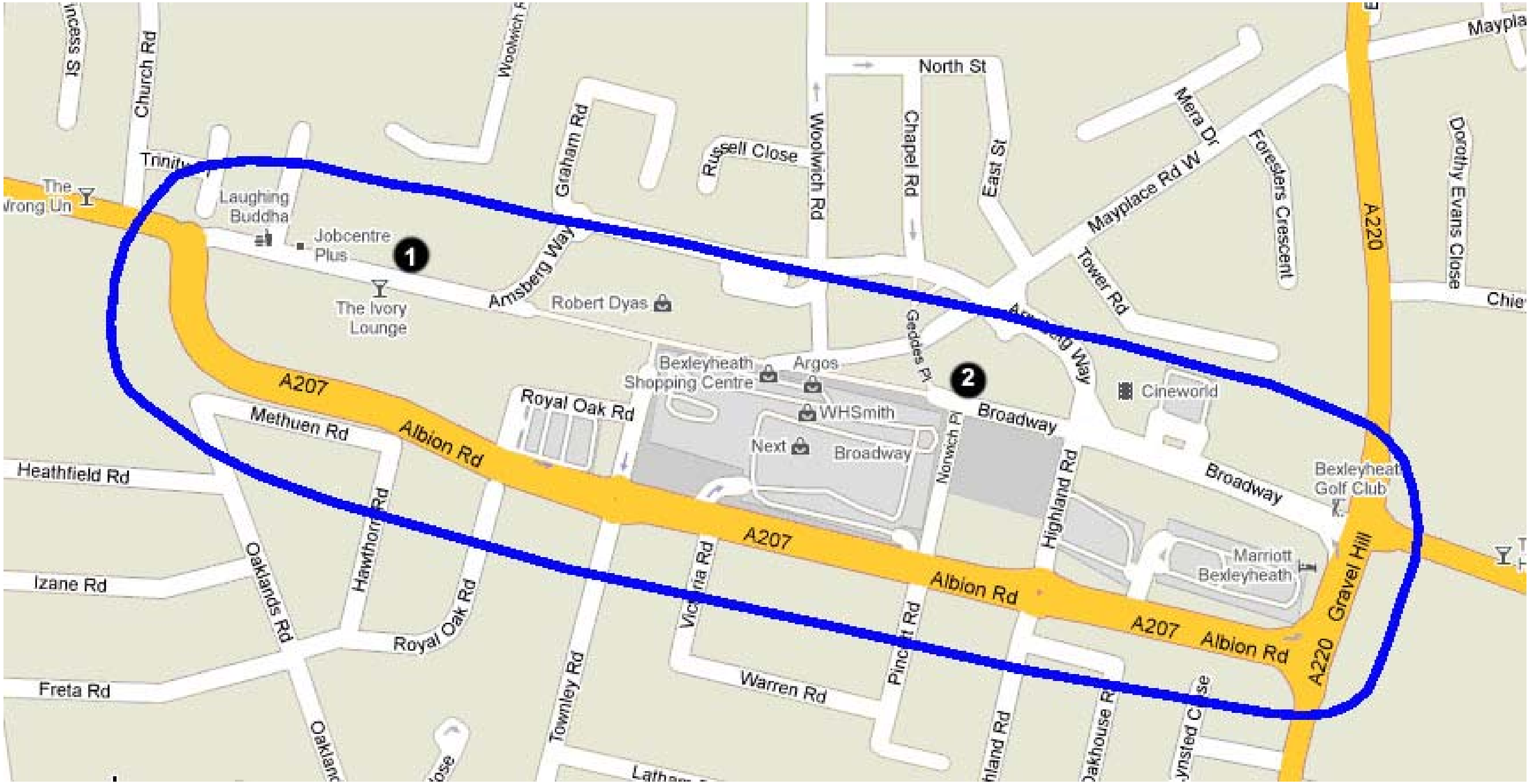
2
3
High St
A124
North St
Billet Ln
Station Ln
Westland Ave
Fentiman Way
Appleton Way
Victor Gardens
Dorrington Gardens
Abbs Cross Gardens
Abbs Cross Ln
Bruce Ave
Mavis Grove
Link Way
Fairkytes Ave
Grey Towers Ave
Walnut Grove
Sandown Ave
Woodfield Way
Victor Approach
Victor Close
Ringwood Ave
The Avenue
Keswick Ave
Leather Ln
Bowden Dr
Inskip Dr
Lodge Ct
Whitegates
The Welcome Inn
McDonald's
Tarantino
The Cricketers
The Fatling & Firkin
The Perfect Smile
Wimpy
Balgores Estates
Utopia Beauty
Richard House
Hogs Head
Ask
Prezzo
Zizzi's
Ripon House
Brazemore Court
Appleton Court
Annabel Court
Victor Court
Victor Walk
RAM RECORDS
Hornchurch Fine Art
KFC
Talfourds Solicitors
Scottish Mutual House
The Hornchurch Conservative Club
Langtons Infant School
Junglee Fun
Digiclear Hearing Aids
Goldsmere Court
The Millennium Rooms the Royal British Legion
Draper Court

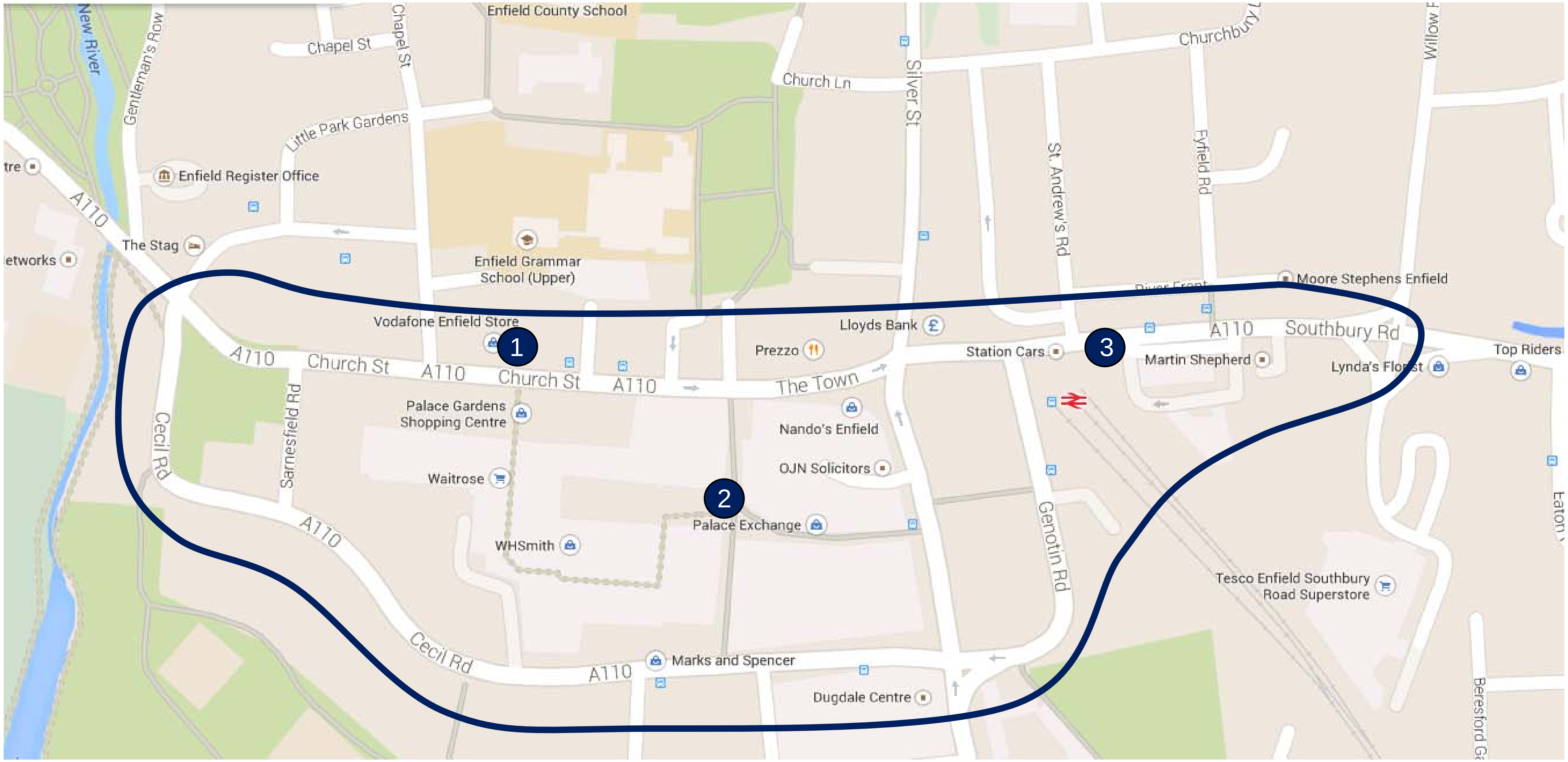
Oxford Street/Regent Street



Bexleyheath

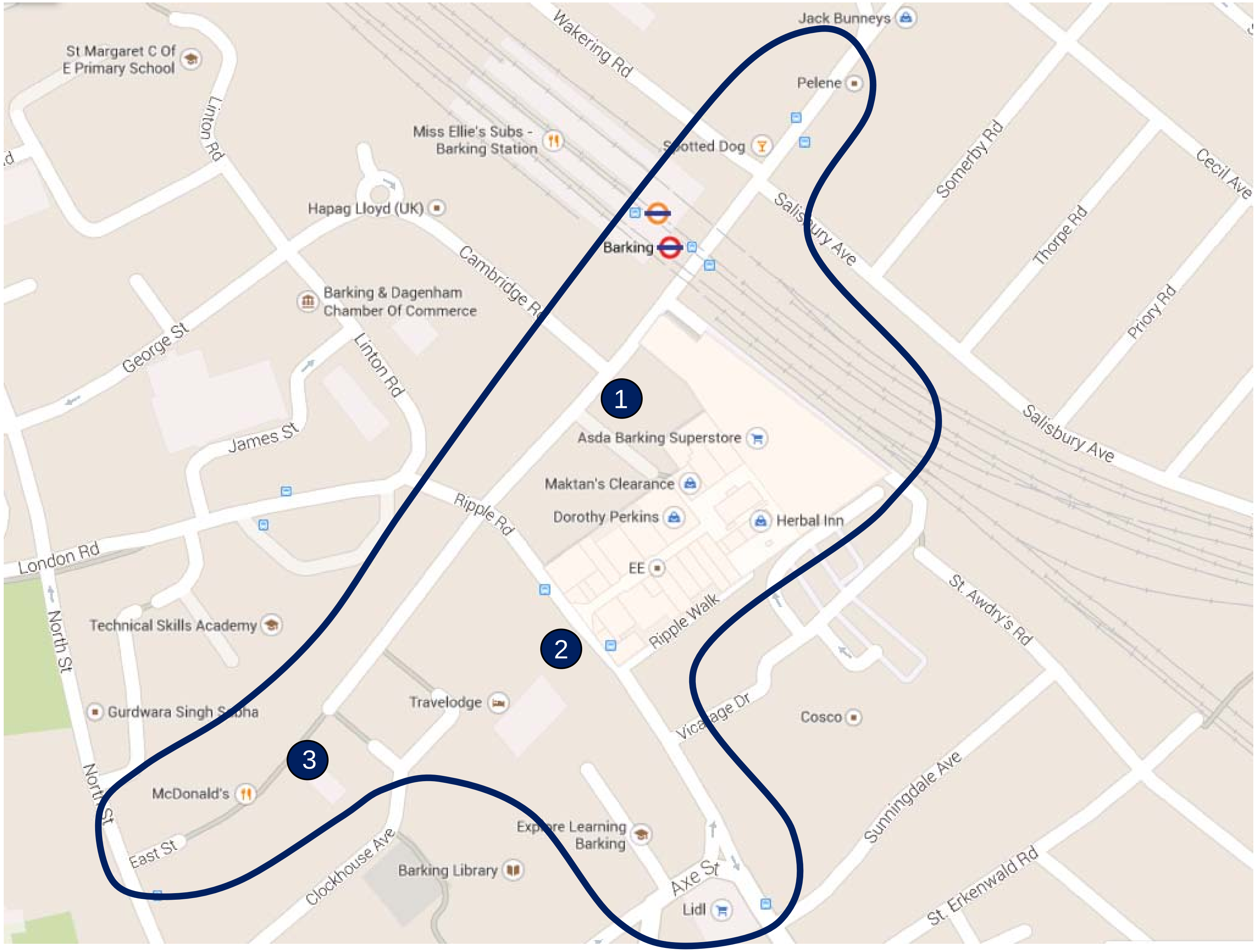


Enfield

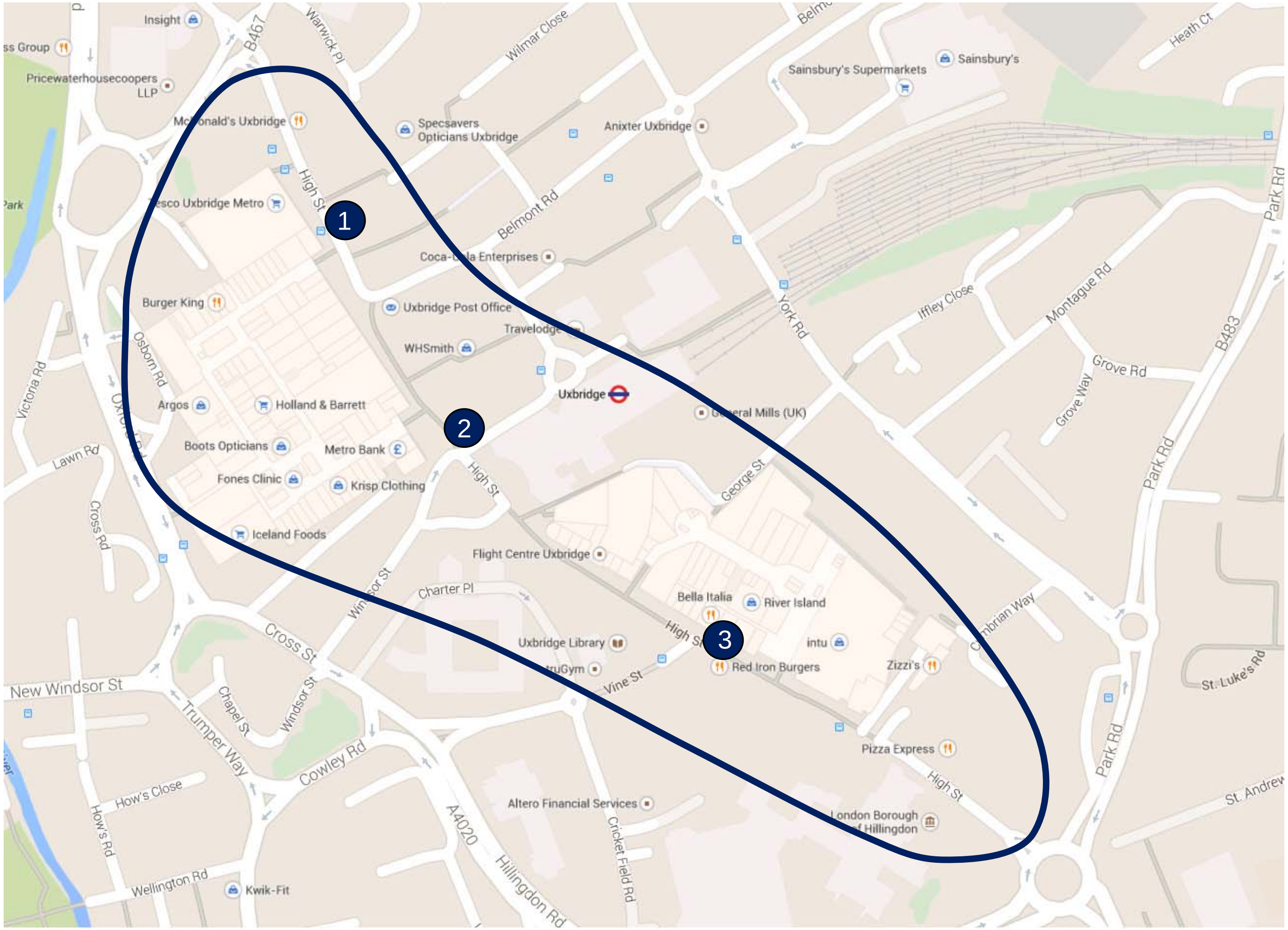


Enfield County School
Chapel St
Chapel St
New River
Gentleman's Row
Little Park Gardens
Church Ln
Silver St
Churchbury
Willow
Enfield Register Office
St. Andrew's Rd
Fyfield Rd
A110
The Stag
Enfield Grammar School (Upper)
Moore Stephens Enfield
Vodafone Enfield Store
Lloyds Bank
Prezzo
Station Cars
A110
Southbury Rd
Top Riders
1
3
Martin Shepherd
Lynda's Florist
A110
Church St
A110
Church St
A110
The Town
Palace Gardens Shopping Centre
Nando's Enfield
Cecil Rd
Sarnesfield Rd
Waitrose
OJN Solicitors
2
Palace Exchange
A110
Genotin Rd
WHSmith
Tesco Enfield Southbury Road Superstore
Cecil Rd
A110
Marks and Spencer
Dugdale Centre
Beresford

Barking

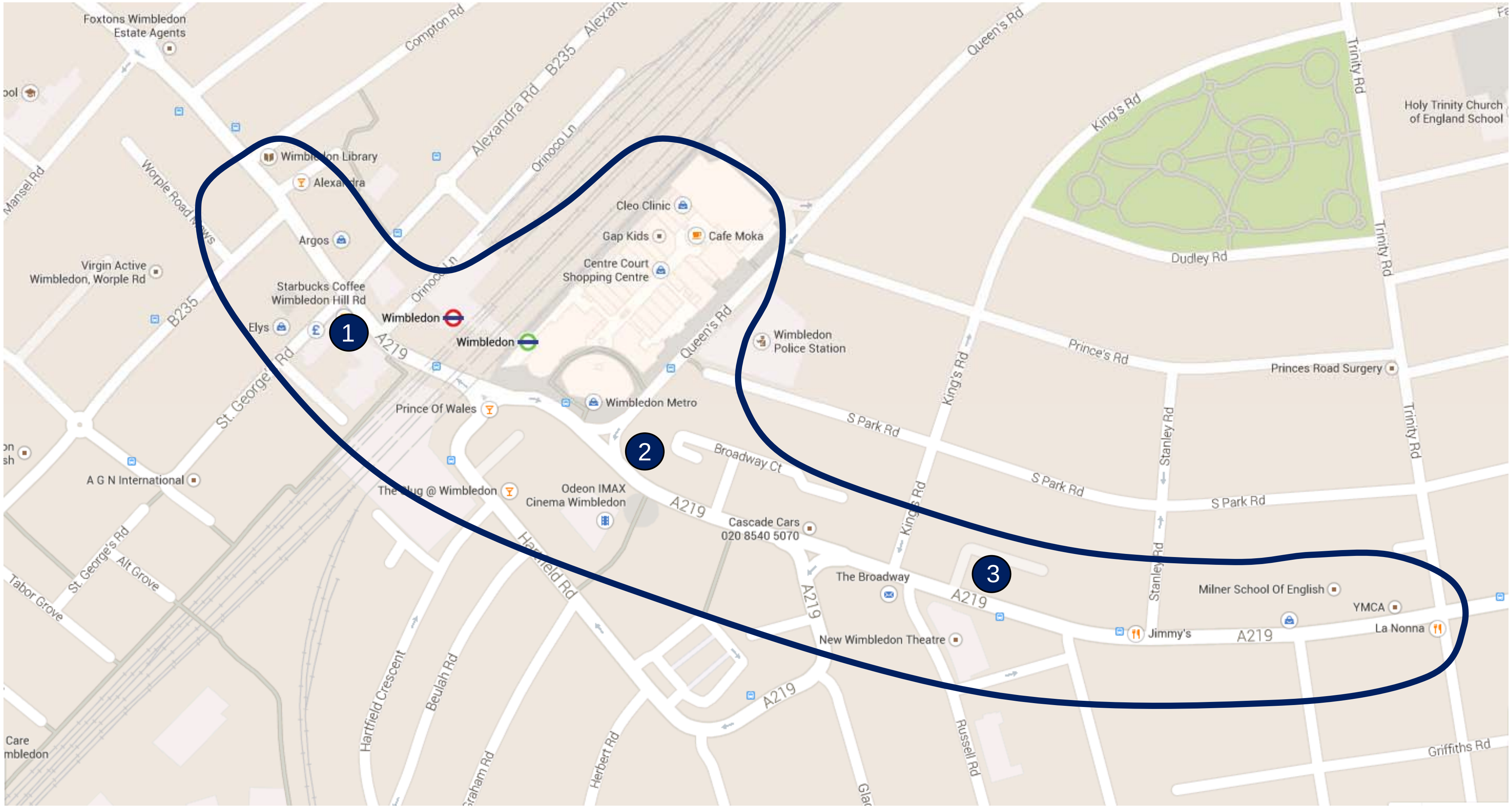

Wakering Rd
Jack Bunneys
St Margaret C Of E Primary School
Pelene
Linton Rd
Miss Ellie's Subs - Barking Station
Spotted Dog
Somerby Rd
Cecil Ave
Hapag Lloyd (UK)
Salisbury Ave
Barking
Cambridge Rd
Thorpe Rd
Barking & Dagenham Chamber Of Commerce
Priory Rd
George St
Linton Rd
1
James St
Asda Barking Superstore
Salisbury Ave
Maktan's Clearance
Ripple Rd
Dorothy Perkins
Herbal Inn
London Rd
EE
St. Awdry's Rd
Technical Skills Academy
Ripple Walk
North St
2
Vicarage Dr
Travelodge
Cosco
Gurdwara Singh Sabha
3
North St
McDonald's
Sunningdale Ave
Explore Learning Barking
East St
Clockhouse Ave
Barking Library
Axe St
St. Erkenwald Rd
Lidl

Uxbridge

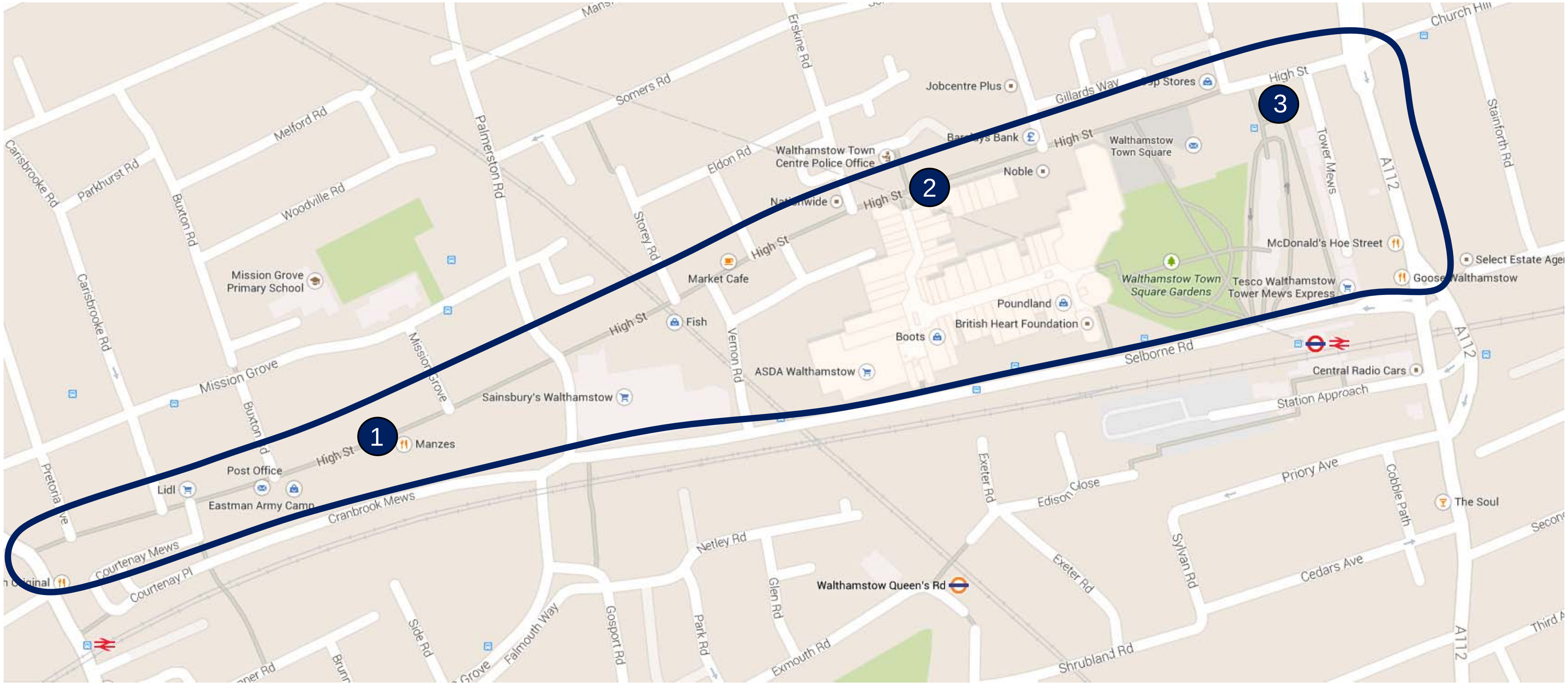


1
2
3
Insight
Pricewaterhousecoopers LLP
Mc onald's Uxbridge
Specsavers Opticians Uxbridge
Anixter Uxbridge
Sainsbury's Supermarkets
Sainsbury's
Tesco Uxbridge Metro
Burger King
Coca-Cola Enterprises
Uxbridge Post Office
Travelodge
WHSmith
Uxbridge
General Mills (UK)
Argos
Holland & Barrett
Boots Opticians
Metro Bank
Fones Clinic
Krisp Clothing
Iceland Foods
Flight Centre Uxbridge
Bella Italia
River Island
intu
Red Iron Burgers
Zizzi's
Uxbridge Library
truGym
Pizza Express
London Borough of Hillingdon
Altero Financial Services
Kwik-Fit
High St
Belmont Rd
York Rd
Iffley Close
Montague Rd
Grove Rd
Grove Way
Park Rd
B483
B467
Warwick Pl
Wilmar Close
Heath Ct
Osborn Rd
Victoria Rd
Lawn Rd
Cross Rd
George St
Charter Pl
Windsor St
Cross St
New Windsor St
Trumper Way
Chapel St
Cowley Rd
How's Close
How's Rd
Wellington Rd
A4020
Hillingdon Rd
Cricket Field Rd
Vine St
Cambrian Way
St. Luke's Rd
St. Andrew

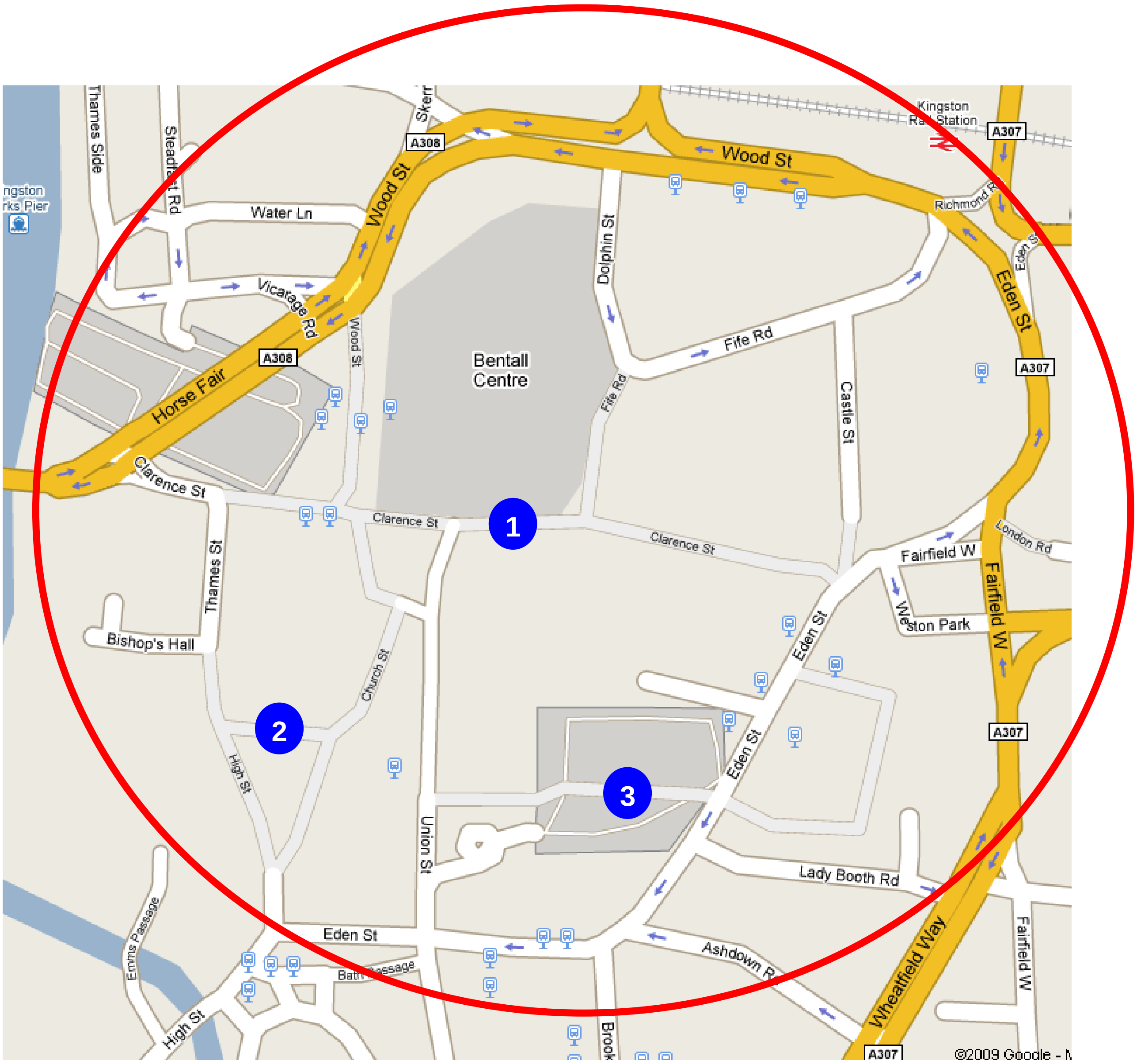
Wimbledon


1
2
3
Foxtons Wimbledon Estate Agents
Compton Rd
B235
Alexandra Rd
Orinoco Ln
Queen's Rd
King's Rd
Trinity Rd
Holy Trinity Church of England School
Dudley Rd
Mansel Rd
Worple Road Mews
Wimbledon Library
Alexandra
Argos
Cleo Clinic
Gap Kids
Cafe Moka
Centre Court Shopping Centre
Virgin Active Wimbledon, Worple Rd
Starbucks Coffee Wimbledon Hill Rd
Elys
Wimbledon
A219
Wimbledon Police Station
Prince's Rd
Princes Road Surgery
St. George's Rd
Prince Of Wales
Wimbledon Metro
S Park Rd
Broadway Ct
Stanley Rd
A G N International
Odeon IMAX Cinema Wimbledon
Cascade Cars 020 8540 5070
The Broadway
Milner School Of English
YMCA
La Nonna
Jimmy's
New Wimbledon Theatre
Alt Grove
Tabor Grove
Hartfield Crescent
Beulah Rd
Hartfield Rd
Herbert Rd
Russell Rd
Griffiths Rd

Walthamstow High Street

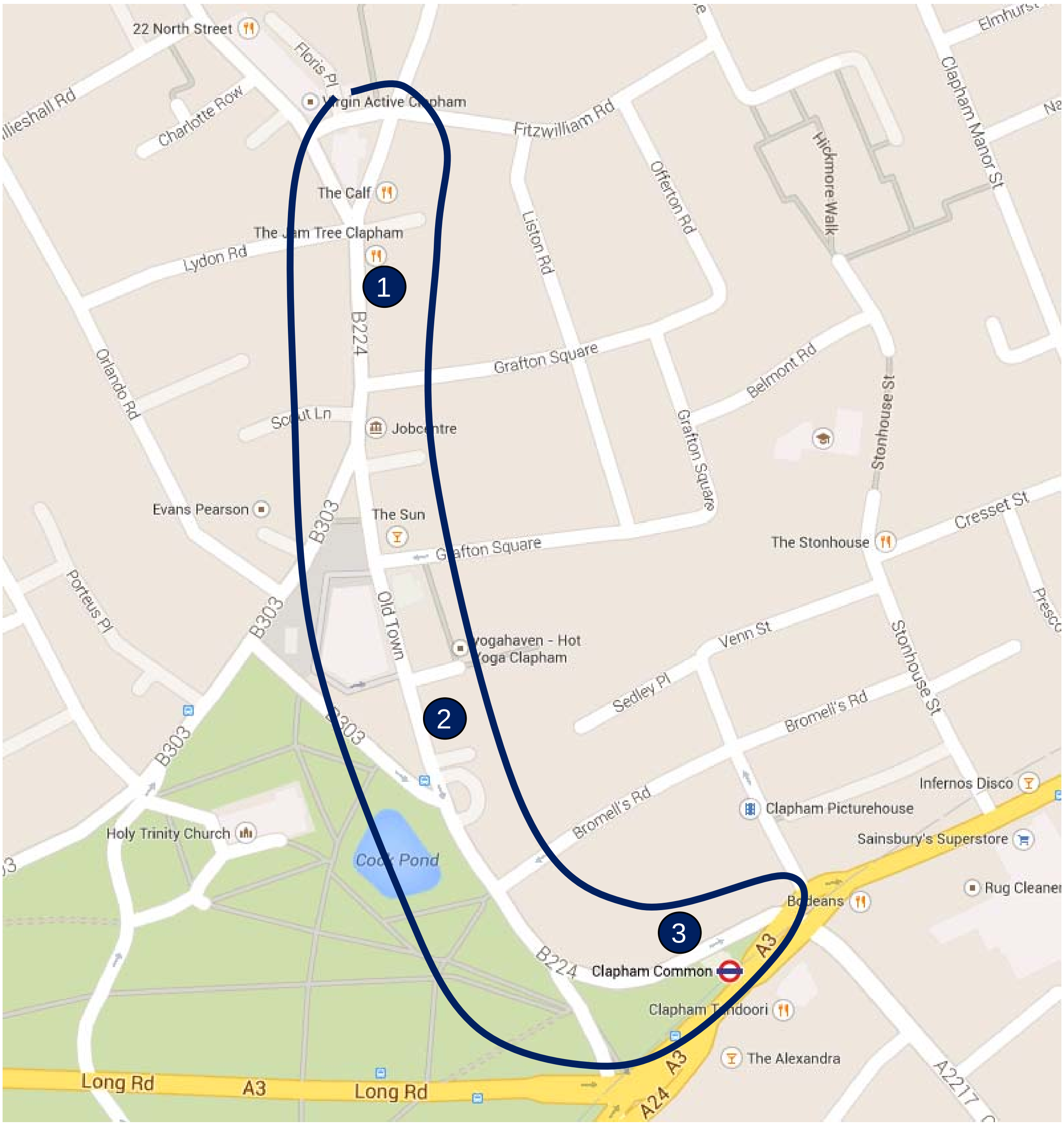


Kingston

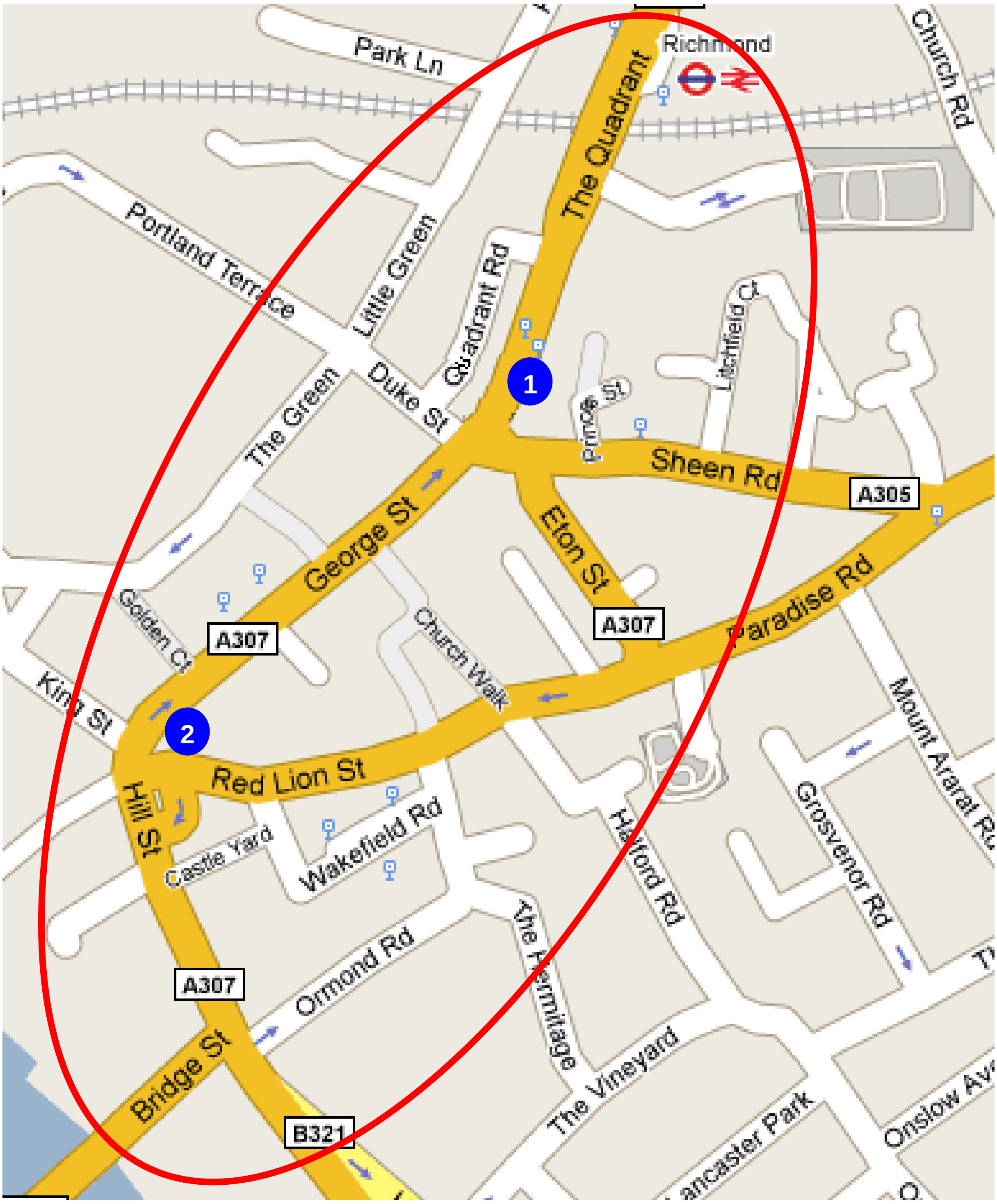


Kingston Rail Station
A307
Wood St
A308
Water Ln
Vicarage Rd
Horse Fair
Thames Side
Bentall Centre
Dolphin St
Fife Rd
Castle St
Eden St
Richmond Rd
Clarence St
Thames St
Bishop's Hall
Church St
High St
Union St
Fairfield W
London Rd
Weston Park
Lady Booth Rd
Ashdown Rd
Wheatfield Way
Emms Passage
Bath Passage
1
2
3
©2009 Google

Clapham Old Town

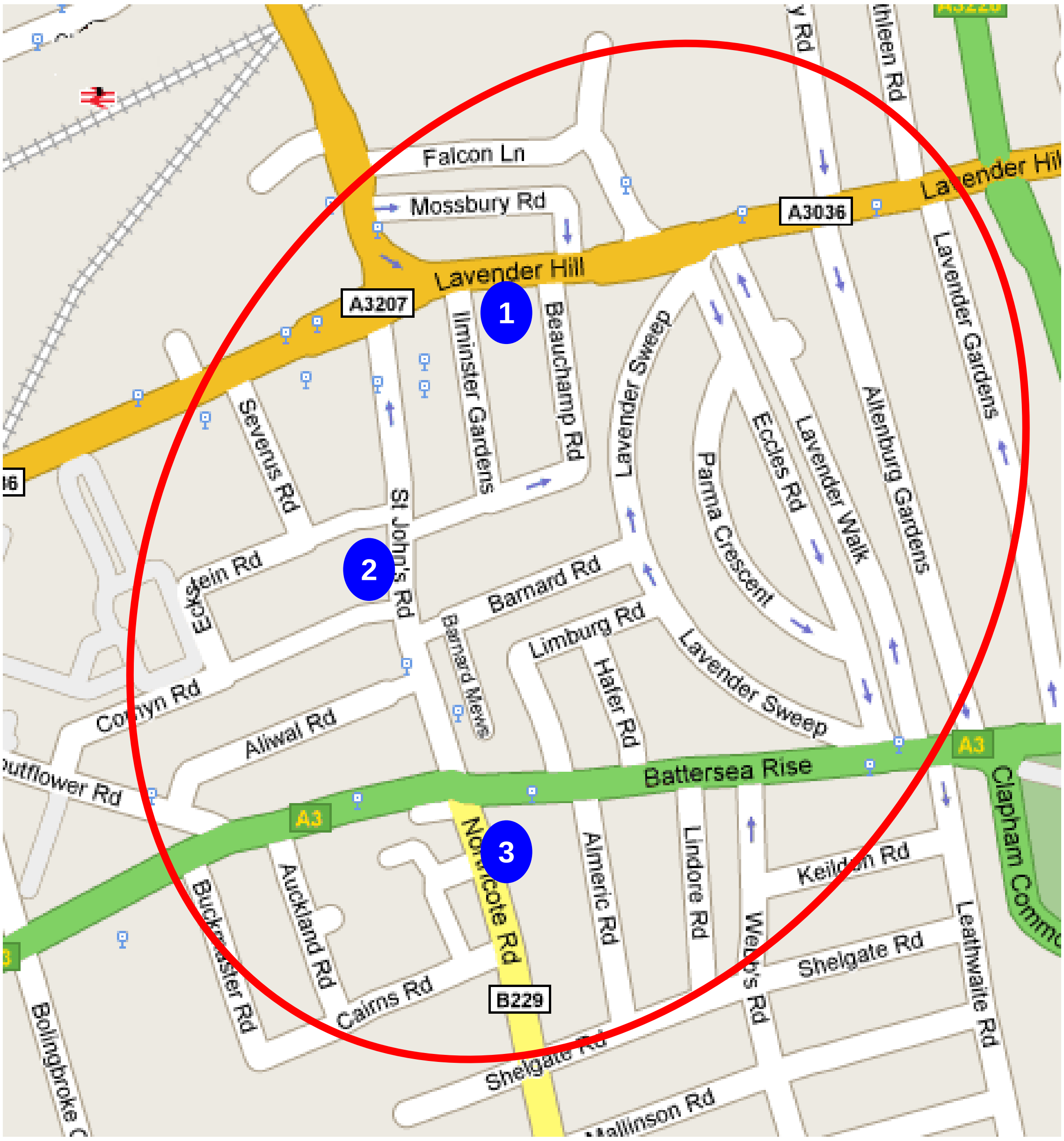


Richmond

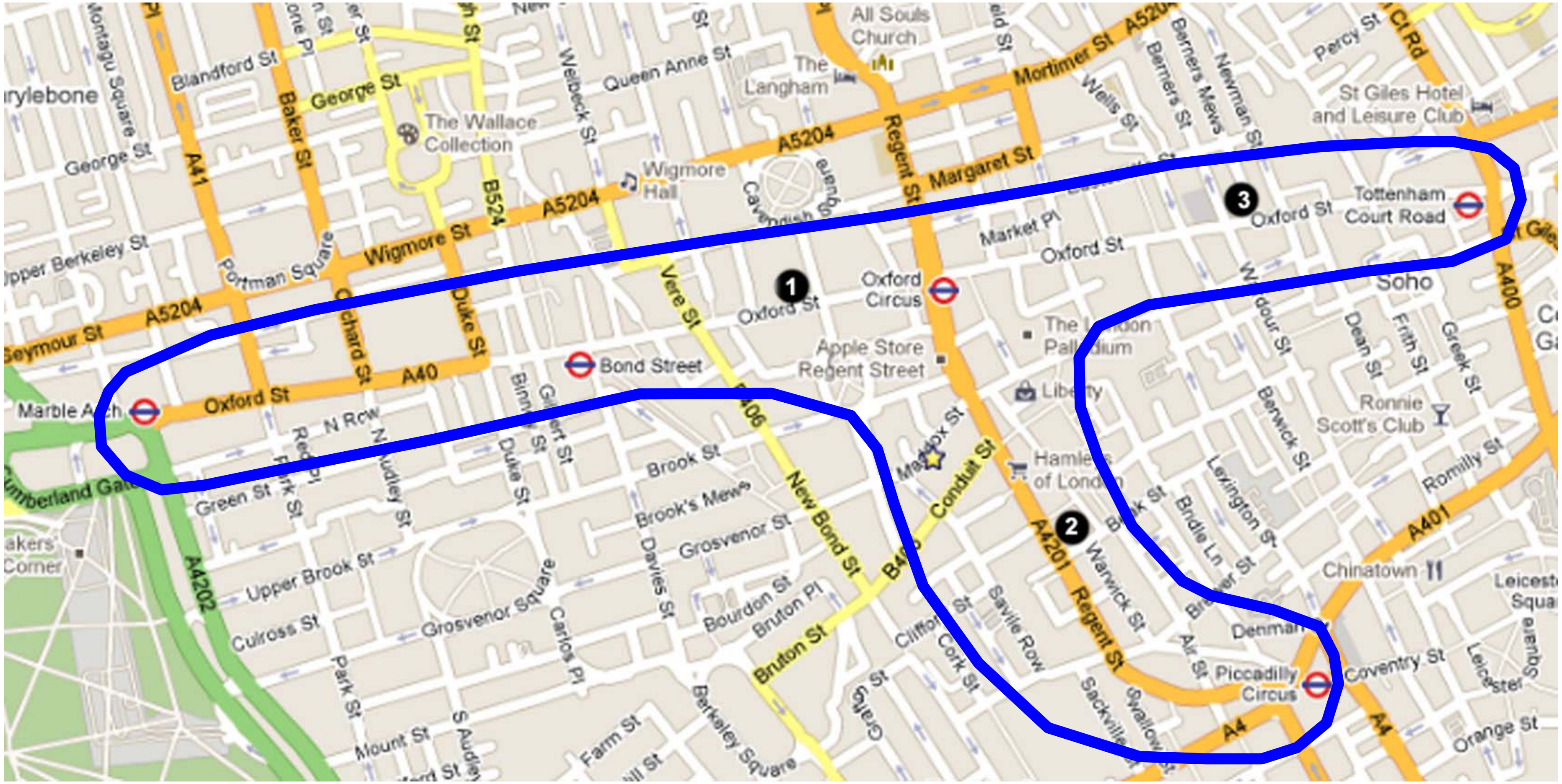


Park Ln
Richmond
Church Rd
The Quadrant
Portland Terrace
Little Green
Quadrant Rd
Litchfield Ct
1
Duke St
The Green
Prince St
Sheen Rd
A305
George St
Eton St
Golden Ct
A307
Church Walk
A307
Paradise Rd
King St
2
Red Lion St
Mount Ararat Rd
Hill St
Castle Yard
Wakefield Rd
Grosvenor Rd
Halford Rd
A307
Ormond Rd
The Hermitage
Bridge St
The Vineyard
B321
Onslow Ave

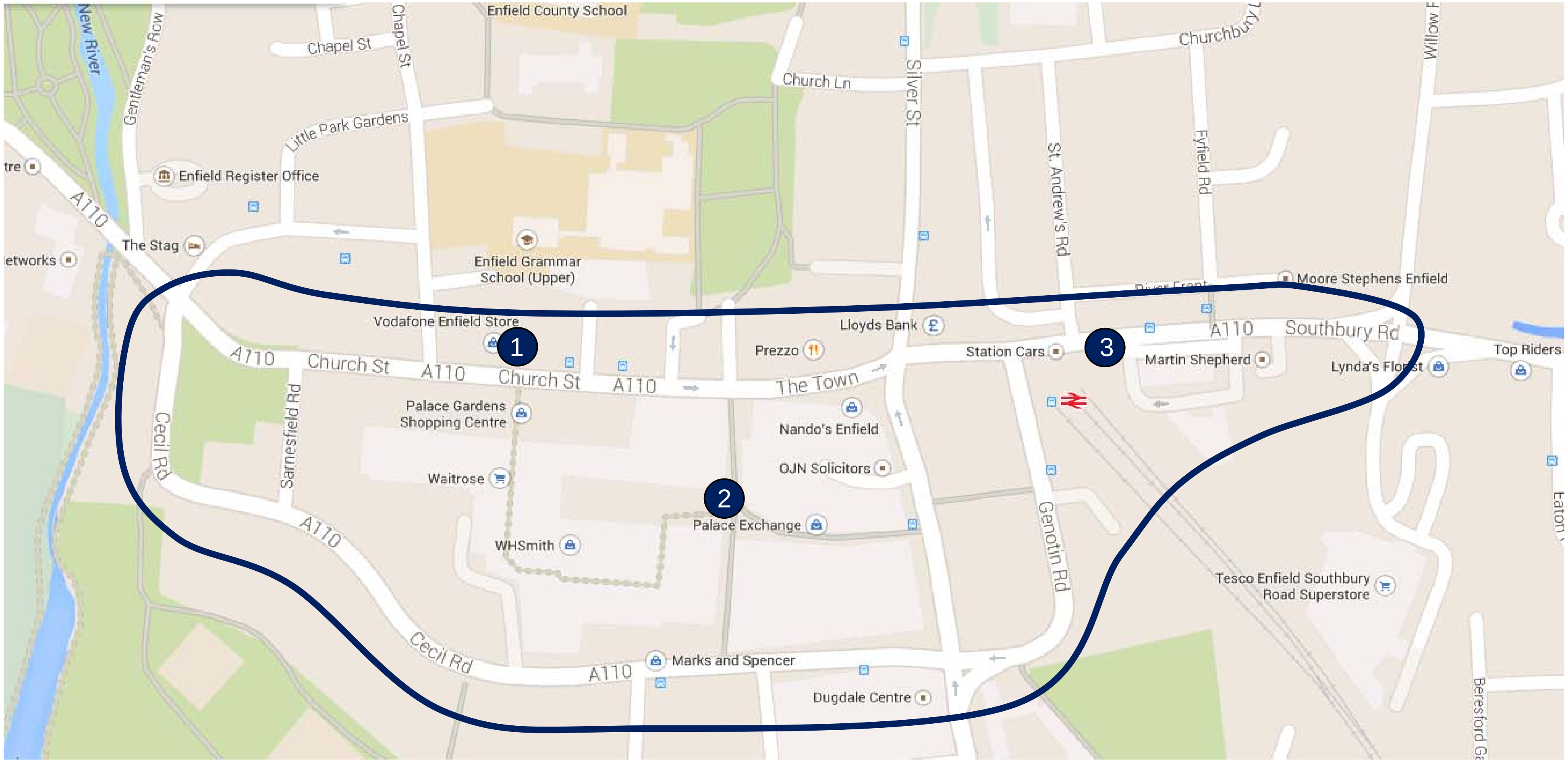
Clapham Junction



Oxford Street/Regent Street

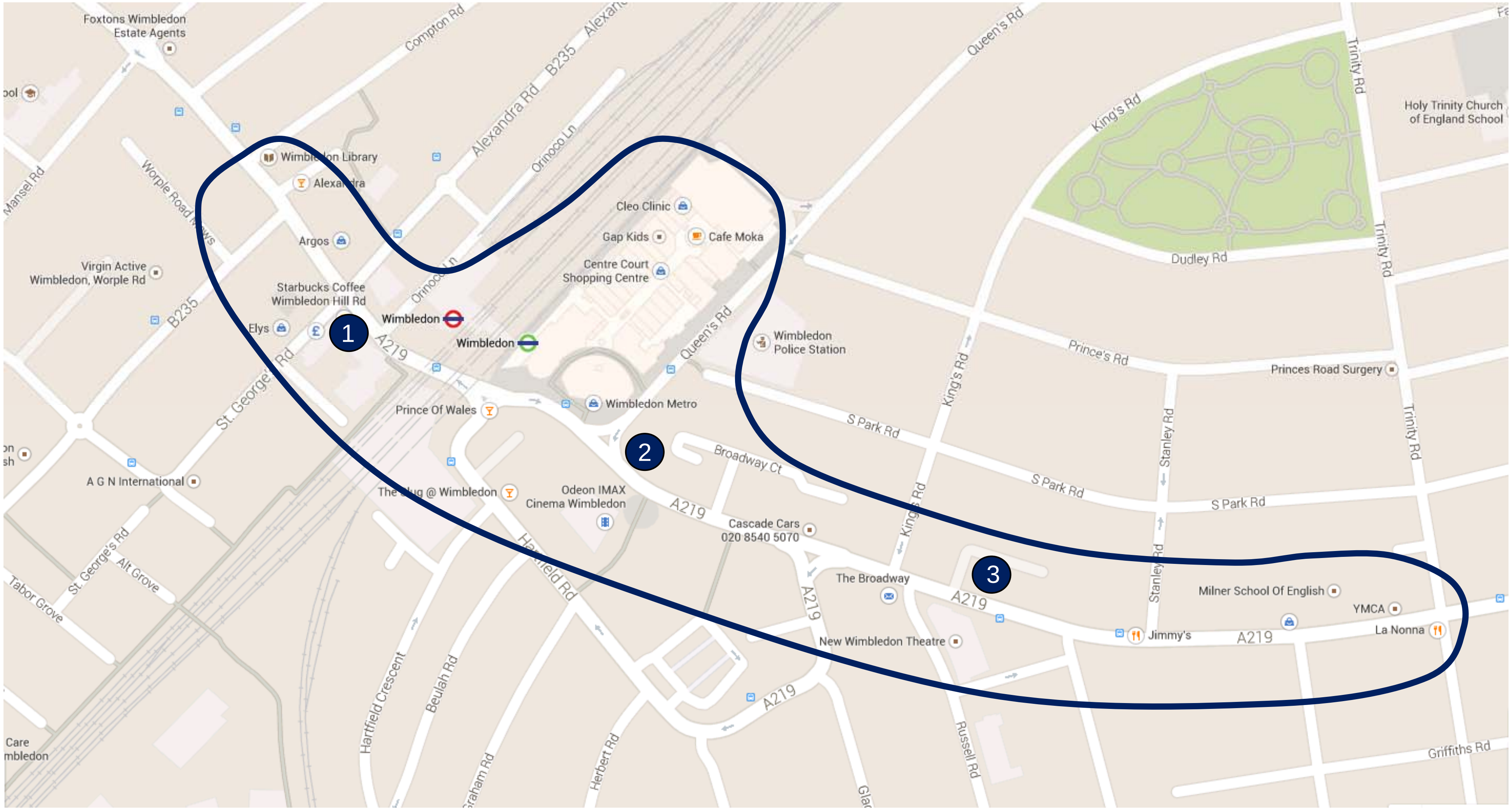


Enfield

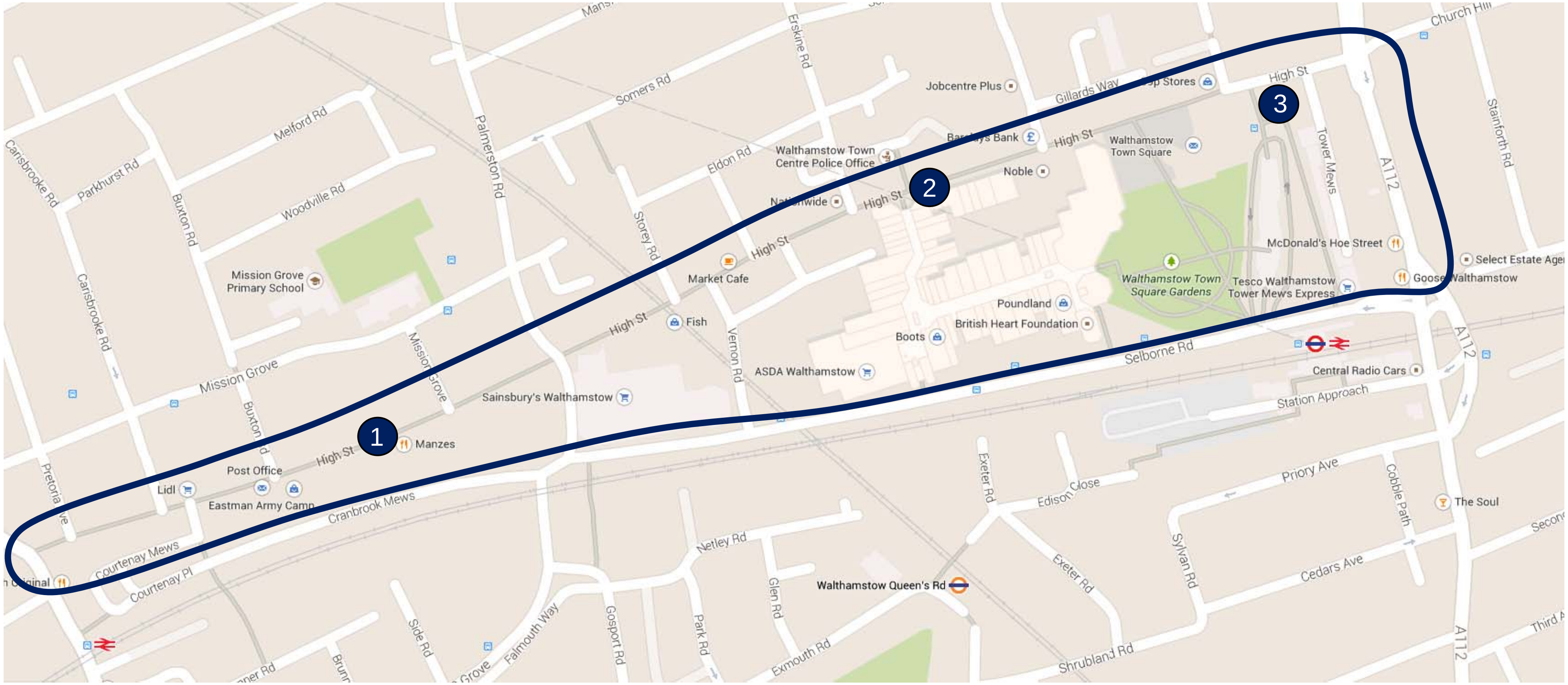


Enfield County School
Chapel St
Chapel St
Church Ln
Silver St
Churchbury
Willow
New River
Gentleman's Row
Little Park Gardens
St. Andrew's Rd
Fyfield Rd
Enfield Register Office
A110
The Stag
etworks
Enfield Grammar School (Upper)
Moore Stephens Enfield
Vodafone Enfield Store
Lloyds Bank
Prezzo
Station Cars
A110
Southbury Rd
Martin Shepherd
Lynda's Florist
Top Riders
1
2
3
A110
Church St
A110
Church St
A110
The Town
Cecil Rd
Sarnesfield Rd
Palace Gardens Shopping Centre
Nando's Enfield
OJN Solicitors
Waitrose
Palace Exchange
WHSmith
Genotin Rd
Tesco Enfield Southbury Road Superstore
Cecil Rd
A110
Marks and Spencer
Dugdale Centre
Beresford

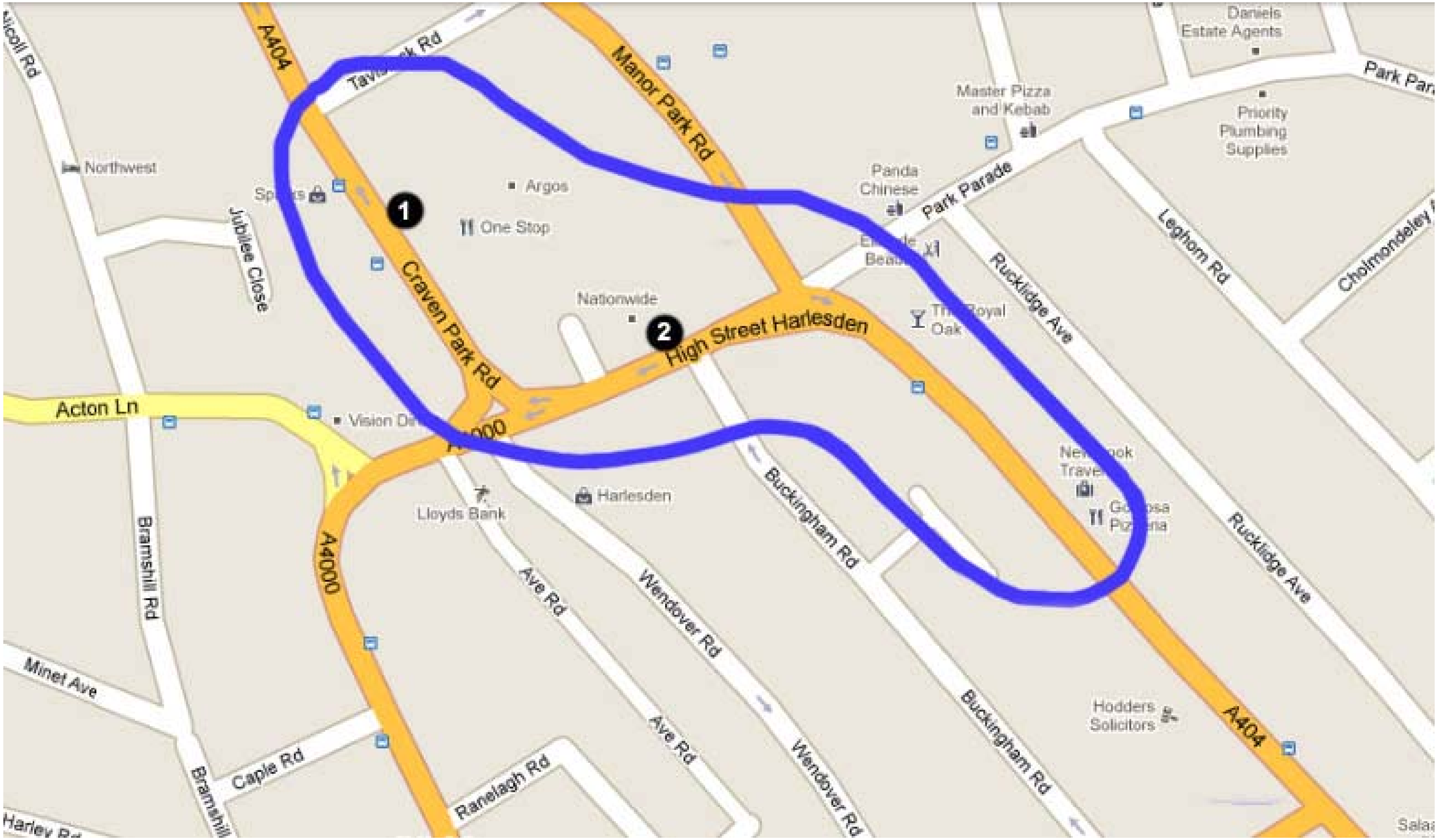
Wimbledon


Foxtons Wimbledon Estate Agents
Compton Rd
B235
Alexandra Rd
Orinoco Ln
Queen's Rd
King's Rd
Trinity Rd
Holy Trinity Church of England School
Mansel Rd
Worple Road Mews
Wimbledon Library
Alexandra
Argos
Cleo Clinic
Gap Kids
Cafe Moka
Centre Court Shopping Centre
Dudley Rd
Virgin Active Wimbledon, Worple Rd
Starbucks Coffee Wimbledon Hill Rd
Wimbledon
Wimbledon
Elys
1
A219
St. George's Rd
Wimbledon Police Station
Prince's Rd
Princes Road Surgery
Prince Of Wales
Wimbledon Metro
2
Broadway Ct
S Park Rd
S Park Rd
S Park Rd
Stanley Rd
A G N International
Odeon IMAX Cinema Wimbledon
Cascade Cars 020 8540 5070
St. George's Rd
Alt Grove
Tabor Grove
Hartfield Rd
The Broadway
3
A219
Milner School Of English
YMCA
Jimmy's
La Nonna
New Wimbledon Theatre
Hartfield Crescent
Beulah Rd
Graham Rd
Herbert Rd
Russell Rd
Griffiths Rd

Walthamstow High Street

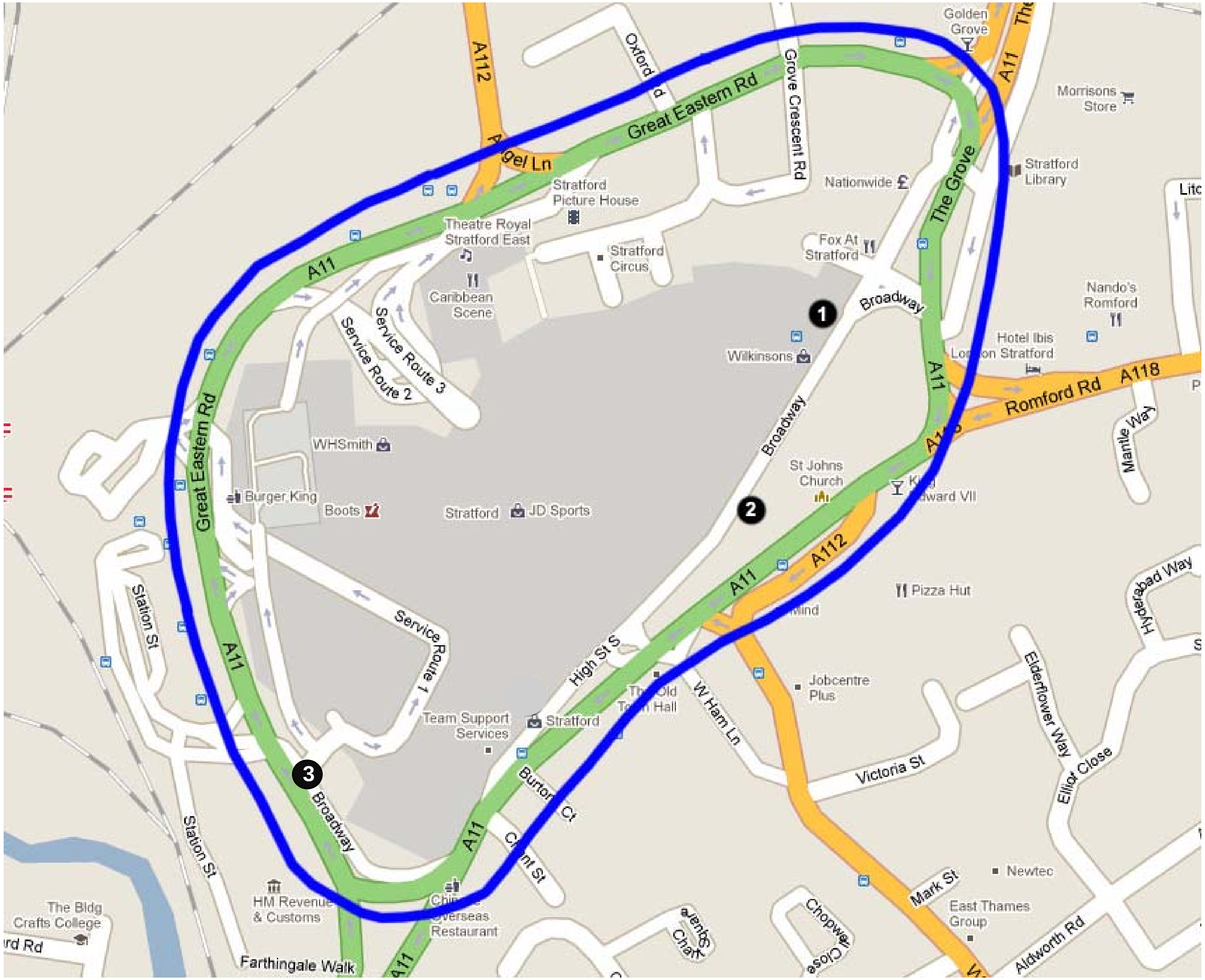


Harlesden



A404
Manor Park Rd
Craven Park Rd
High Street Harlesden
Park Parade
Acton Ln
A4000
Argos
One Stop
Nationwide
Northwest
Jubilee Close
Master Pizza and Kebab
Panda Chinese
Daniels Estate Agents
Priority Plumbing Supplies
Leghorn Rd
Rucklidge Ave
Buckingham Rd
Wendover Rd
Ave Rd
Lloyds Bank
Harlesden
Bramshill Rd
Minet Ave
Caple Rd
Ranelagh Rd
Hodders Solicitors
1
2

Stratford

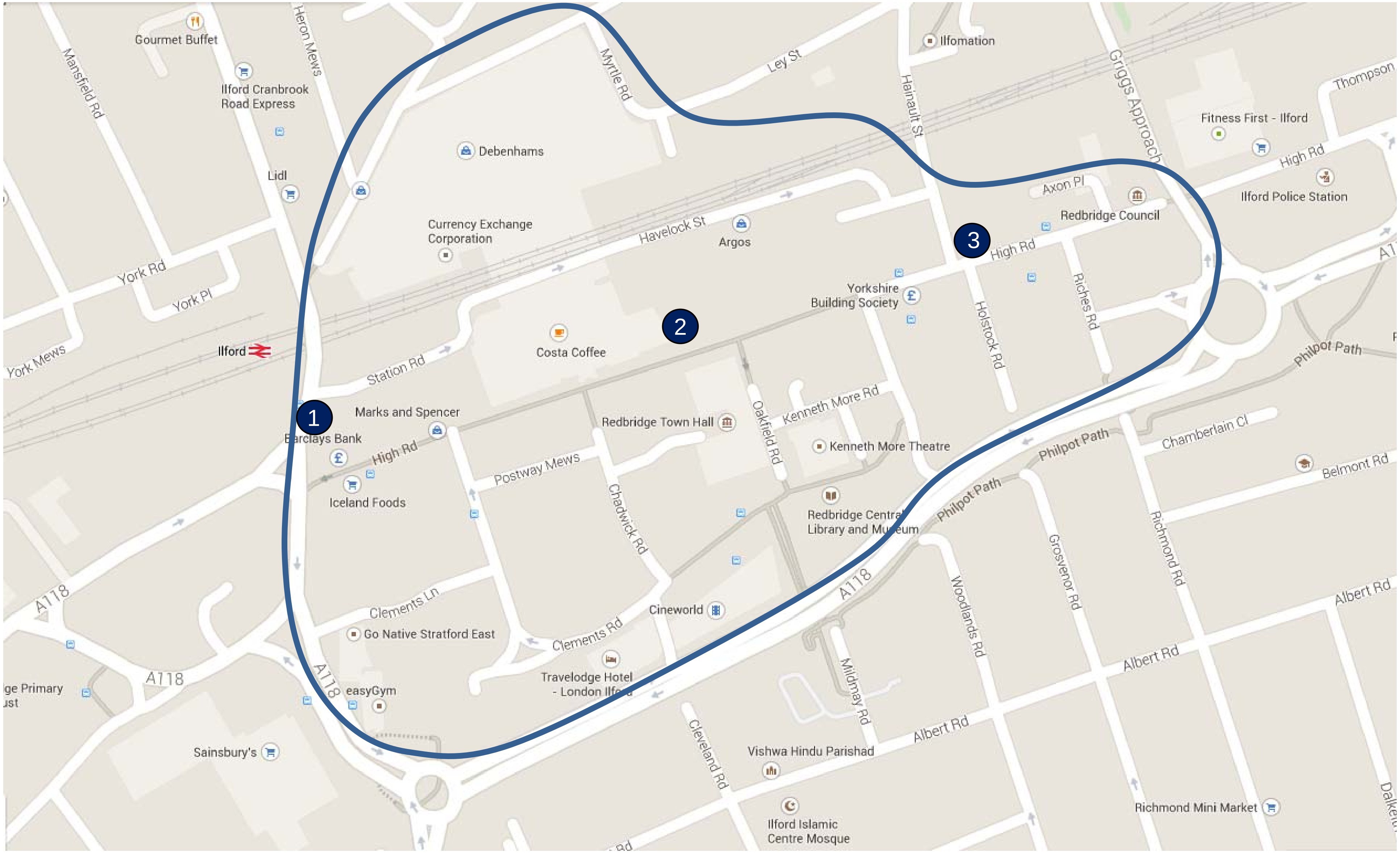


Great Eastern Rd
A11
A112
Angel Ln
Grove Crescent Rd
The Grove
Golden Grove
Morrisons Store
Stratford Library
Nationwide
Stratford Picture House
Theatre Royal Stratford East
Stratford Circus
Fox At Stratford
Caribbean Scene
Service Route 2
Service Route 3
Broadway
Wilkinsons
Hotel Ibis London Stratford
Nando's Romford
Romford Rd
A118
Mantle Way
WHSmith
Burger King
Boots
Stratford
JD Sports
St Johns Church
Pizza Hut
Station St
Service Route 1
High St S
The Old Town Hall
W Ham Ln
Jobcentre Plus
Victoria St
Elderflower Way
Elliot Close
Team Support Services
Burford Ct
Newtec
Mark St
East Thames Group
Aldworth Rd
HM Revenue & Customs
The Bldg Crafts College
Farthingale Walk
Chopwell Close
1
2
3

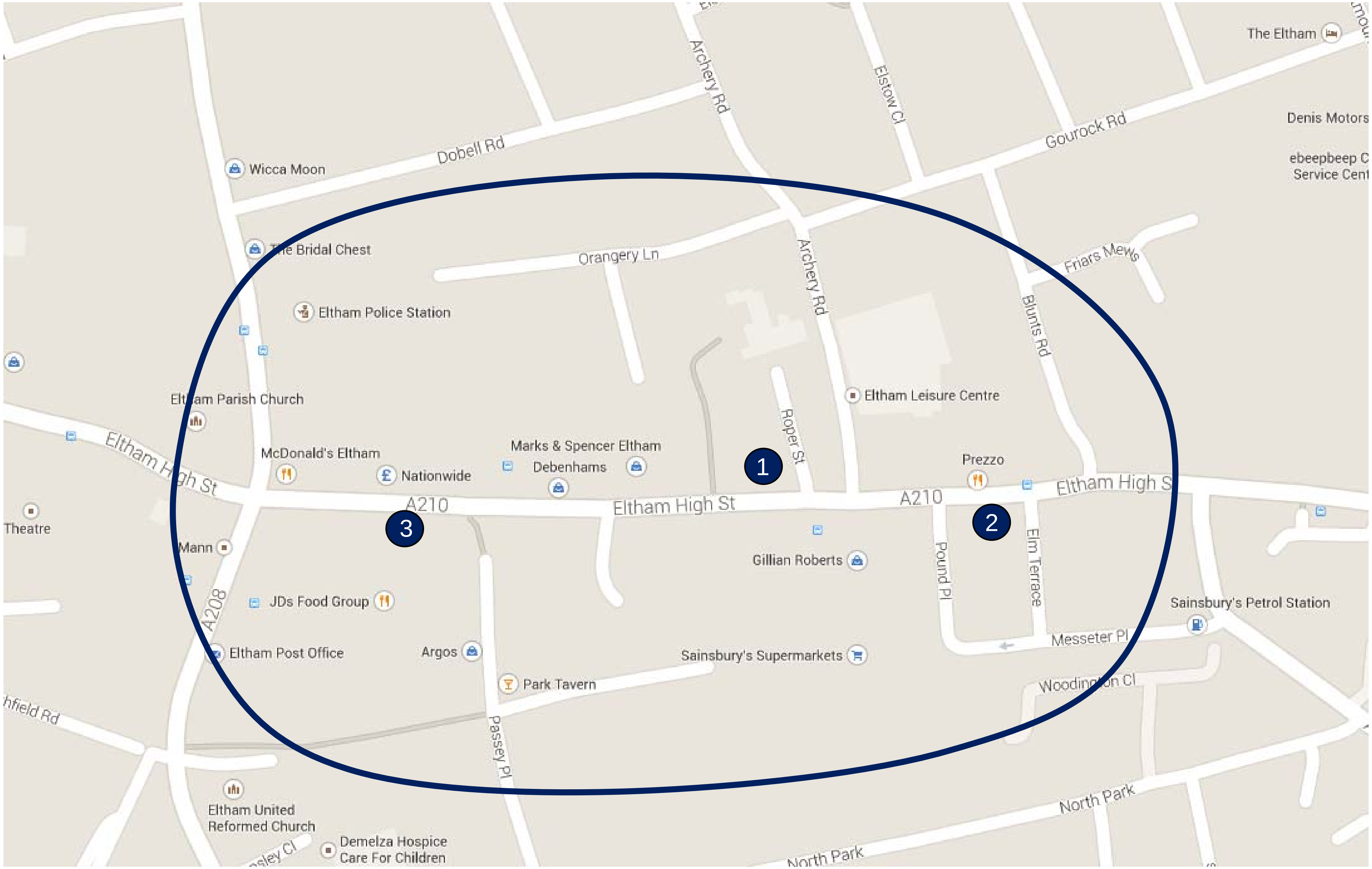
Woolwich

Woolwich High St
A206
Woolwich Church St
Warren Ln
Royal Artillery Museum
Lewisham Young People's Theatre
Greenwich Leisure
Marlborough Rd
Hardinge St
Waterfront Leisure Centre
Rope Yard Rails
Beresford St
Seventh St
Prince Albert
New Wine Church
Powis St
Gala Clubs
Hare St
Bunton St
Myrtle Alley
London Business College
Creton St
MacBean St
Dial Arch
Woolwich County Court
Ferryview Health Centre
Argos
The Castle Tavern
John Wilson St
A205
A2204
Littlewoods Index
WHSmith
Clara Pl
Monk St
Iceland Foods
Costa Coffee
Beresford Square
The Elephant & Castle
John Lewis Opticians
Charles Grinling Walk
Castile Rd
Calderwood St
Rectory Pl
Sainsbury's Supermarkets
Hudgell & Partners
Bathway
Polytechnic St
Cash Converters
Green's End
Eakes Pl
Anglian College London
Spray St
Taylor's Buildings
Market Street Health Centre
Market St
Wellington St
Great Harry
KFC
Thomas St
Mann Countrywide
Woolwich Arsenal Rail Station
Somerfield Stores
Woolwich Tramshed
Favourite Inn
Mary St

Ilford

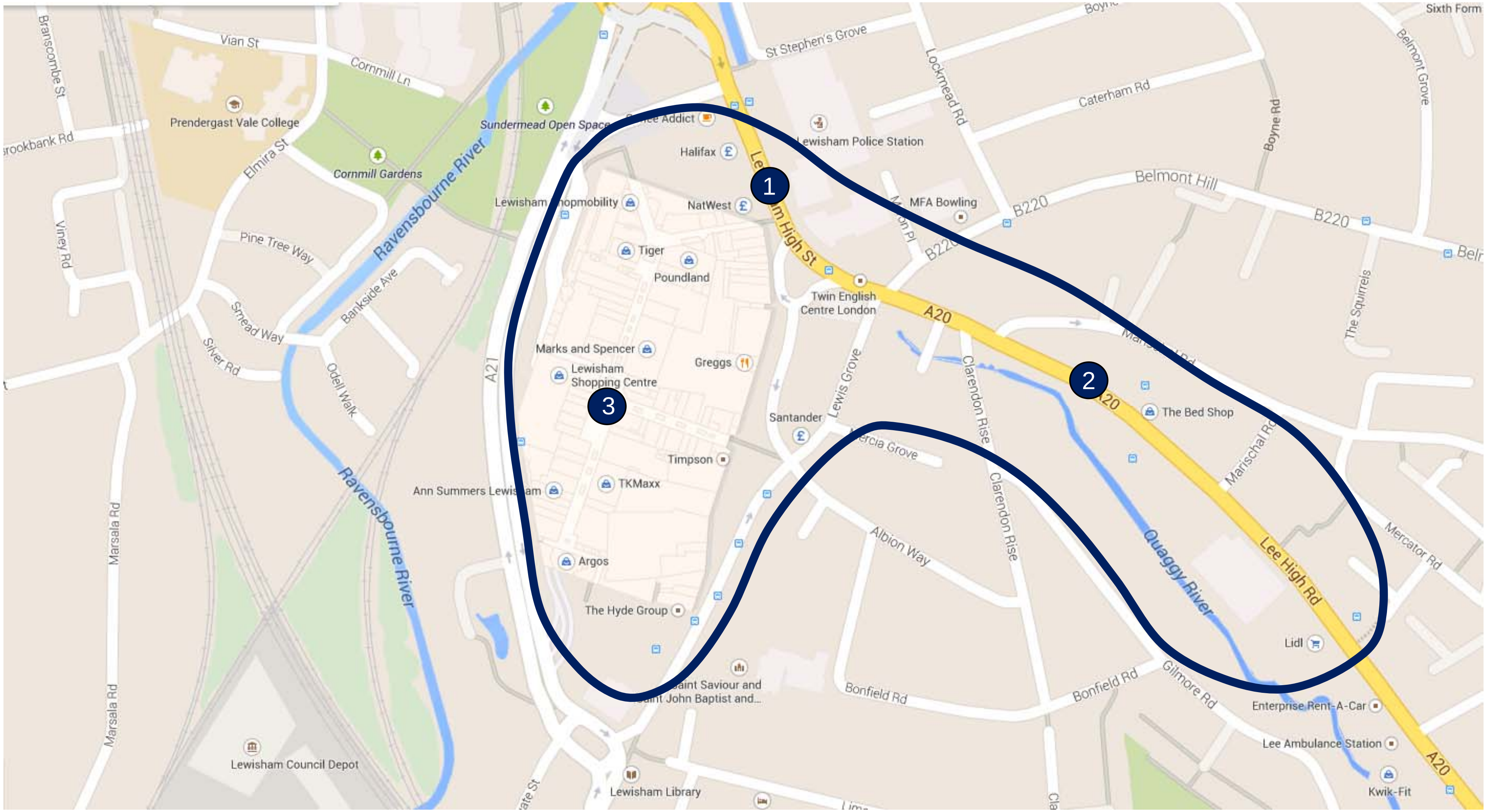

1
2
3
Gourmet Buffet
Ilford Cranbrook Road Express
Lidl
Debenhams
Currency Exchange Corporation
Argos
Costa Coffee
Yorkshire Building Society
Redbridge Council
Ilford Police Station
Fitness First - Ilford
Ilfomation
Marks and Spencer
Barclays Bank
Iceland Foods
Redbridge Town Hall
Kenneth More Theatre
Redbridge Central Library and Museum
Cineworld
Go Native Stratford East
Travelodge Hotel - London Ilford
easyGym
Sainsbury's
Vishwa Hindu Parishad
Ilford Islamic Centre Mosque
Richmond Mini Market
Ilford
High Rd
Station Rd
Havelock St
York Rd
York Pl
York Mews
Mansfield Rd
Heron Mews
Myrtle Rd
Ley St
Hainault St
Griggs Approach
Axon Pl
Holstock Rd
Riches Rd
Oakfield Rd
Kenneth More Rd
Chadwick Rd
Postway Mews
Clements Ln
Clements Rd
A118
Philpot Path
Chamberlain Cl
Belmont Rd
Albert Rd
Richmond Rd
Grosvenor Rd
Woodlands Rd
Mildmay Rd
Cleveland Rd
Thompson

Eltham



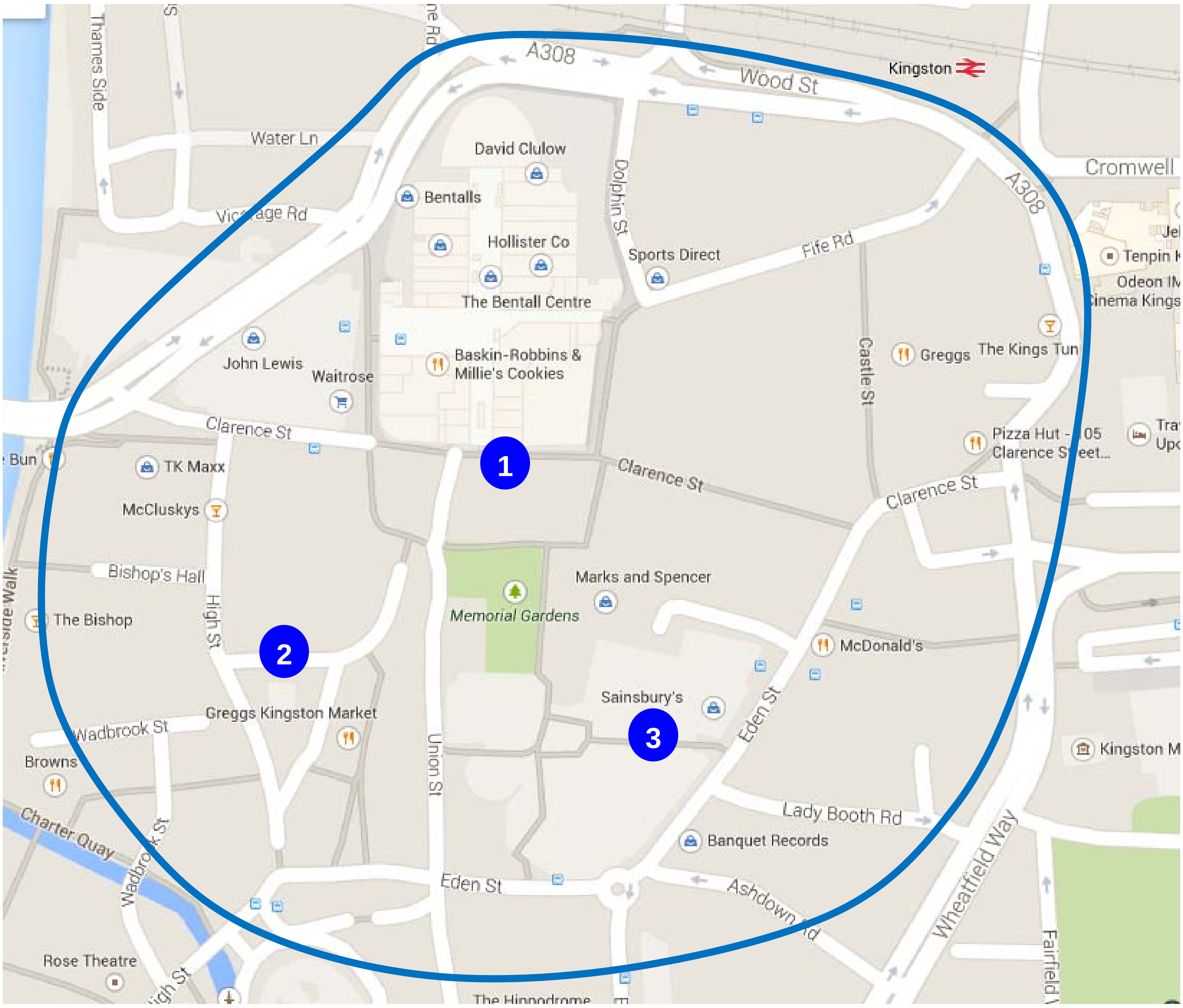
The Eltham
Denis Motors
Gourock Rd
Dobell Rd
Wicca Moon
Archery Rd
Elstow Cl
Orangery Ln
The Bridal Chest
Eltham Police Station
Friars Mews
Blunts Rd
Eltham Leisure Centre
Eltham Parish Church
Roper St
McDonald's Eltham
Nationwide
Marks & Spencer Eltham
Debenhams
Prezzo
Eltham High St
A210
1
2
3
Theatre
Mann
Gillian Roberts
Pound Pl
Elm Terrace
JDs Food Group
A208
Sainsbury's Petrol Station
Eltham Post Office
Argos
Sainsbury's Supermarkets
Messeter Pl
Park Tavern
Passey Pl
Eltham United
Reformed Church
Demelza Hospice
Care For Children
North Park

Lewisham

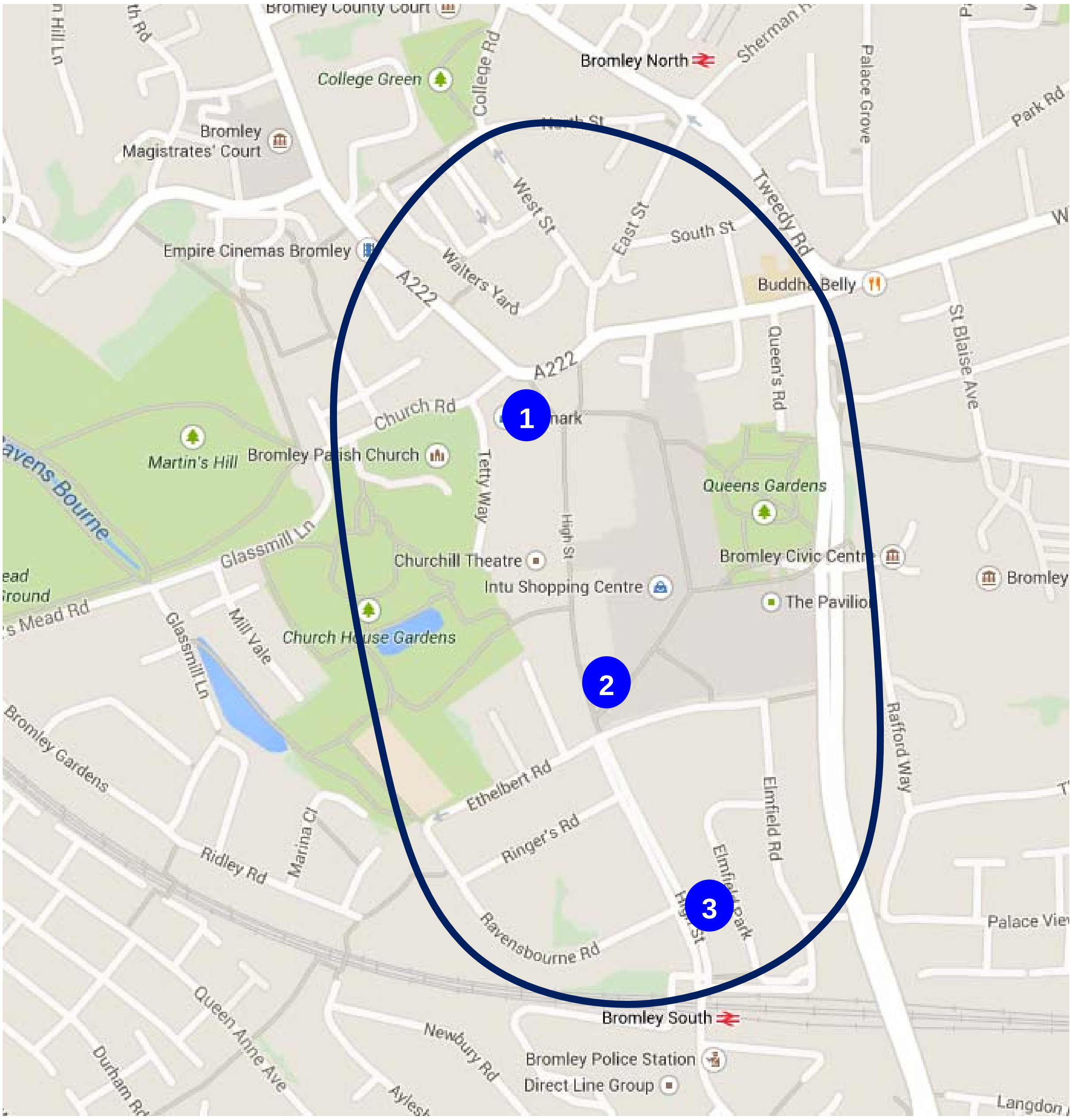


1
2
3
Prendergast Vale College
Cornmill Gardens
Sundermead Open Space
Ravensbourne River
Lewisham Police Station
Halifax
NatWest
Tiger
Poundland
Marks and Spencer
Lewisham Shopping Centre
Greggs
Santander
Timpson
TKMaxx
Argos
The Hyde Group
Twin English Centre London
MFA Bowling
The Bed Shop
Quaggy River
Lee High Rd
Lidl
Enterprise Rent-A-Car
Lee Ambulance Station
Kwik-Fit
Lewisham Library
Lewisham Council Depot
Belmont Hill
Caterham Rd
St Stephen's Grove
Albion Way
Bonfield Rd
Clarendon Rise
A20
A21
B220

Kingston

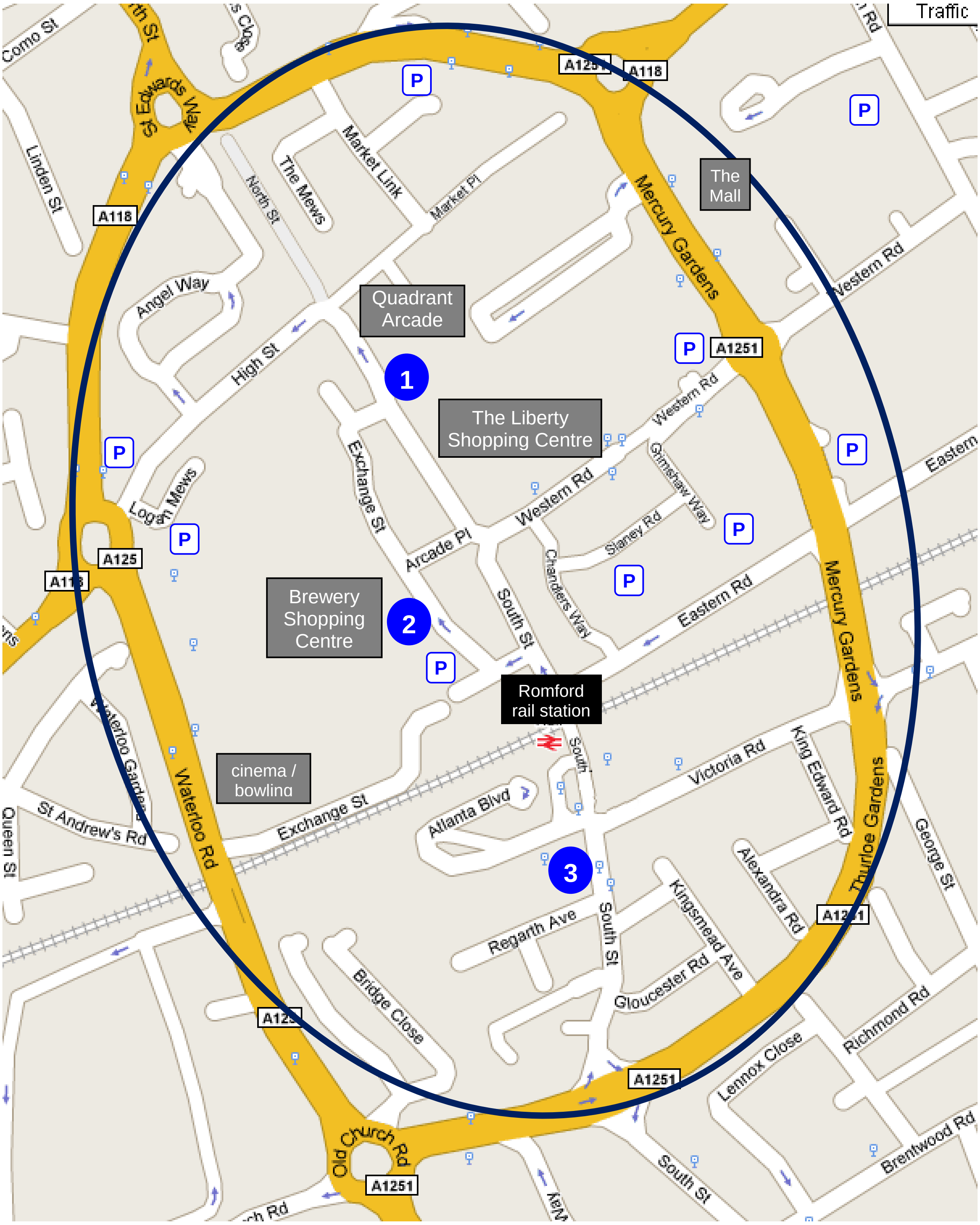

1
2
3
A308
Wood St
Kingston
Cromwell
Thames Side
Water Ln
Vicarage Rd
David Clulow
Bentalls
Hollister Co
The Bentall Centre
Dolphin St
Sports Direct
Fife Rd
John Lewis
Waitrose
Baskin-Robbins &
Millie's Cookies
Castle St
Greggs
The Kings Tun
Tenpin
Clarence St
TK Maxx
McCluskys
Bishop's Hall
The Bishop
High St
Memorial Gardens
Marks and Spencer
McDonald's
Pizza Hut
Greggs Kingston Market
Wadbrook St
Browns
Charter Quay
Sainsbury's
Eden St
Union St
Lady Booth Rd
Banquet Records
Ashdown Rd
Wheatfield Way
Rose Theatre
The Hippodrome

Bromley

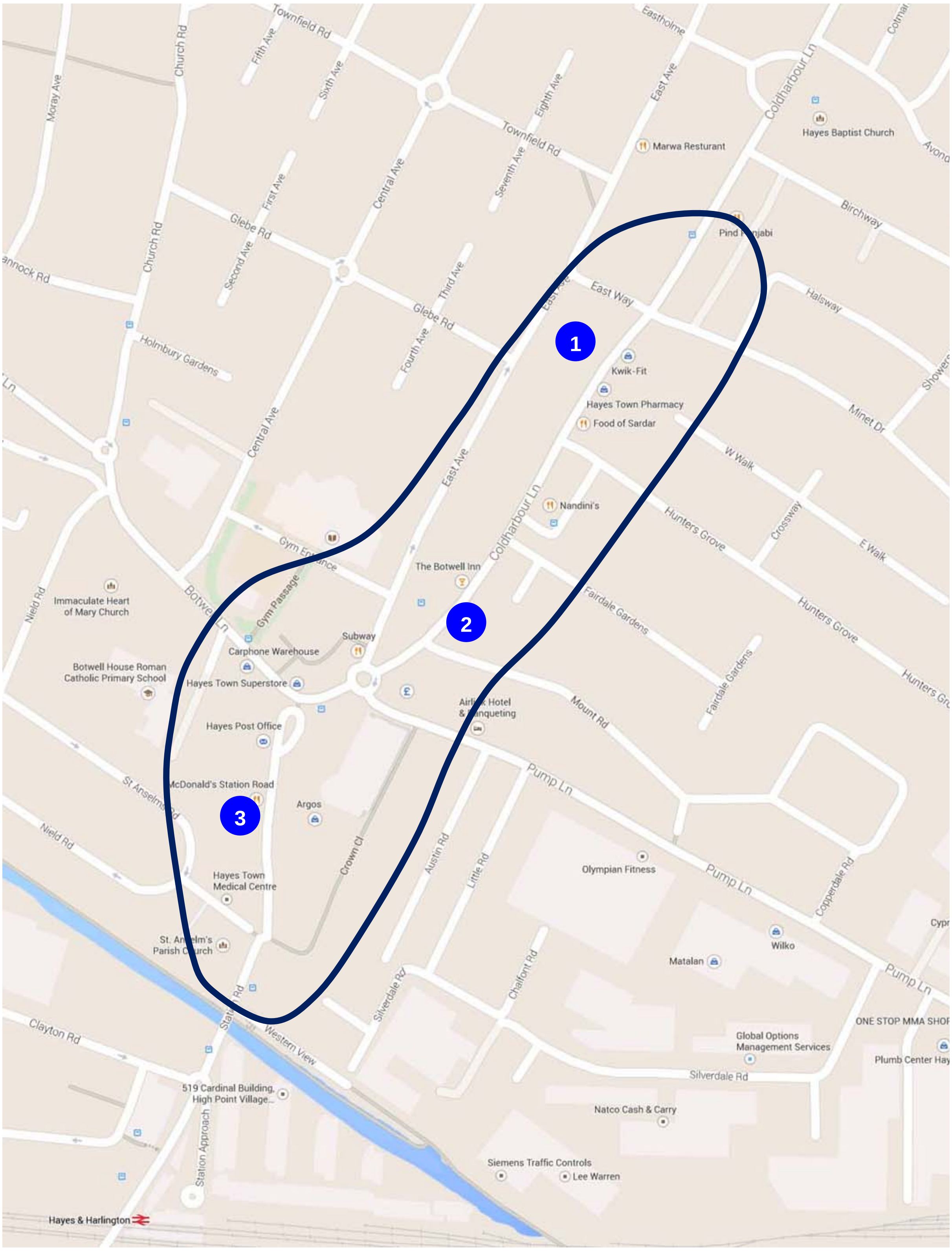


Bromley North
College Green
College Rd
Bromley Magistrates' Court
Empire Cinemas Bromley
West St
East St
South St
Tweedy Rd
Palace Grove
Park Rd
Walters Yard
A222
Buddha Belly
Church Rd
Queen's Rd
St Blaise Ave
1
Martin's Hill
Bromley Parish Church
Tetty Way
Queens Gardens
High St
Glassmill Ln
Churchill Theatre
Bromley Civic Centre
Intu Shopping Centre
Bromley
The Pavilion
Mill Vale
Glassmill Ln
Church House Gardens
2
Rafford Way
Bromley Gardens
Ethelbert Rd
Elmfield Rd
Marina Cl
Ringer's Rd
Ridley Rd
Elmfield Park
3
Palace View
Ravensbourne Rd
Queen Anne Ave
Bromley South
Newbury Rd
Bromley Police Station
Durham Rd
Direct Line Group
Langdon

Romford


Traffic
Quadrant Arcade
1
The Liberty Shopping Centre
The Mall
Brewery Shopping Centre
2
Romford rail station
cinema / bowling
3
P
Como St
Linden St
St Edwards Way
A118
Angel Way
High St
North St
The Mews
Market Link
Market Pl
A1251
Mercury Gardens
Western Rd
Logan Mews
A125
Exchange St
Arcade Pl
South St
Chandlers Way
Slaney Rd
Grimshaw Way
Eastern Rd
Eastern
Waterloo Gardens
Waterloo Rd
St Andrew's Rd
Queen St
Exchange St
Atlanta Blvd
Victoria Rd
King Edward Rd
Thurloe Gardens
George St
Alexandra Rd
Kingsmead Ave
Regarth Ave
Gloucester Rd
Bridge Close
Lennox Close
Richmond Rd
Brentwood Rd
Old Church Rd

Hayes



1
2
3
Townfield Rd
Glebe Rd
East Ave
East Way
Coldharbour Ln
Central Ave
Church Rd
Marwa Resturant
Hayes Baptist Church
Pind Punjabi
Kwik-Fit
Hayes Town Pharmacy
Food of Sardar
Nandini's
The Botwell Inn
Subway
Carphone Warehouse
Hayes Town Superstore
Hayes Post Office
McDonald's Station Road
Argos
Hayes Town Medical Centre
Immaculate Heart of Mary Church
Botwell House Roman Catholic Primary School
Olympian Fitness
Wilko
Matalan
Global Options Management Services
Natco Cash & Carry
Siemens Traffic Controls
Lee Warren
519 Cardinal Building, High Point Village...
Hayes & Harlington
Pump Ln
Mount Rd
Silverdale Rd
Hunters Grove
Fairdale Gardens
Minet Dr
Birchway
Halsway
Western View
Station Approach
Clayton Rd
Nield Rd
St Anselms Rd
Gym Passage
Crown Cl
Austin Rd
Little Rd
Chalfont Rd