Transport for London

Topic Overview

TRAVEL AND SPEND IN LONDON'S TOWN CENTRES

TfL Customer Research

June 2011

MAYOR OF LONDON

Transport for London

CONTENTS

Acknowledgement

This research was conducted by Accent on behalf of TfL during March 2011.

1. Summary of findings

Overall, the findings show that people who walk or use the bus to get to a town centre spend more per head per month than other mode users[1]. While their spend per visit is lower, this higher monthly spend is due to the higher frequency of visits by bus and on foot. This pattern of monthly spend by mode has remained consistent over time.[2]

Comparisons between the type of town centres (as defined in the London Plan) show that shoppers spend less per visit in District town centres but that these are visited most frequently. In comparison, Oxford Street is visited less frequently but people stay longer when they get there and spend more.

2. Background

TfL have been conducting research since 1999, to understand the contribution of visitors to the economic health and viability of town centres across London. The most recent surveys were conducted during March 2011 with 4,746 visitors to fifteen town centres (Appendix A), to determine their shopping behaviour, frequency of visits and spend. For ease of interpretation for this Topic Overview, the town centres have been grouped according to the London Plan definitions of Metropolitan, Major, District and International – see table below. More detailed results for the fifteen individual town centres are available in the full report[3].

Metropolitan	Major	District	International
Mainly in the suburbs, serve a wide catchment area, offer a high level and range of comparison shopping	Characteristic of inner London, important shopping and service centres, with a borough wide catchment area	Have traditionally provided convenience goods and services for more local communities are distributed across London	Main concentration of a wide range of globally attractive, specialist or comparison shopping
Bromley Croydon Ealing Wood Green Harrow Kingston	Bexleyheath Clapham Junction Woolwich Stratford	Harlesden Camberwell Hackney Greenwich	Oxford Street/Regent Street

[1] The results have been calculated from what shoppers said they spent in the town centre on a particular visit and are not an indication of total household expenditure. Comprehensive details of household expenditure can be obtained from the Office of National Statistics website

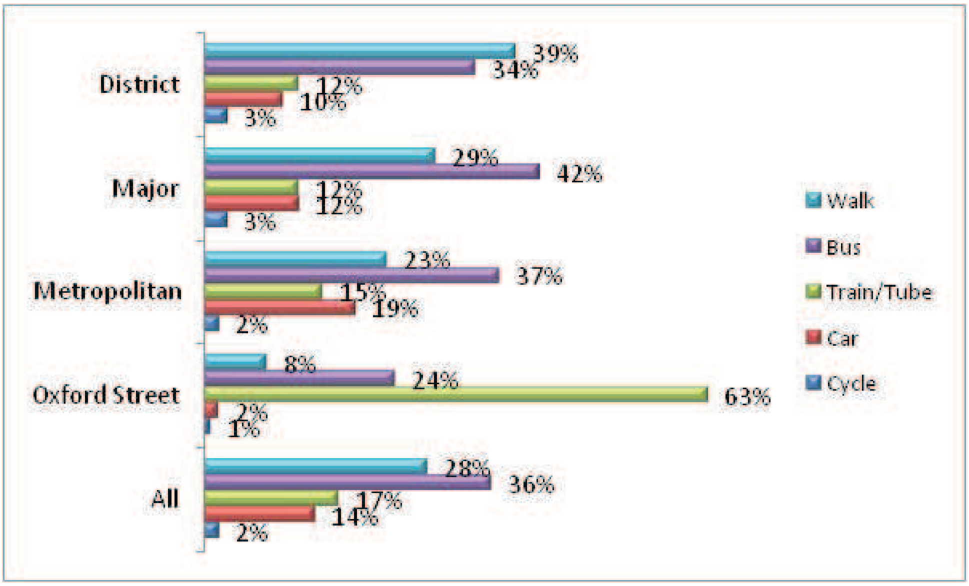
[2] Similar research was reported in 2004 and 2009. See: *Town Centres Survey 2003-4, 2004,* TfL Customer Research/Accent, *Understanding the contribution made by bus users to the economic health and viability of London's town centres*, 2009, TfL Customer Research/Synovate

[3] *Town Centres 2011*, TfL Customer Research/Accent, 2011

3. Means of access

Walking is the most popular means of getting to District town centres, since more people are likely to live or work within a 10 minute walk of the centre. Bus is the most popular means of travel to Metropolitan and Major centres, while the Tube is the most popular choice for getting to Oxford Street. Hardly anyone drives to Oxford Street but around a fifth of visitors to a Metropolitan town centre will have arrived there by car.

Means of access by town centre type



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

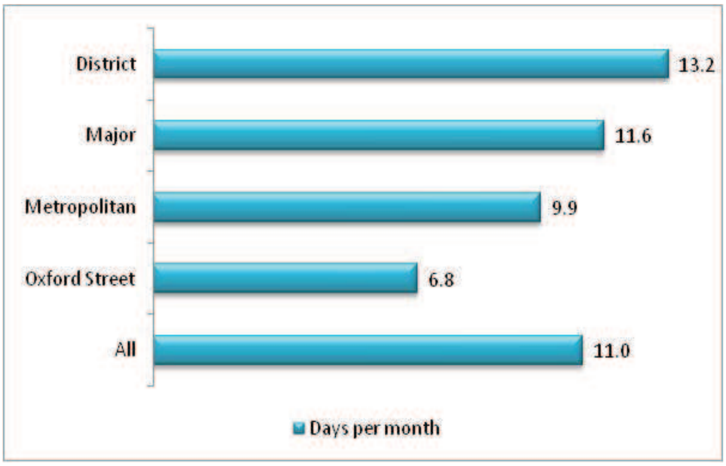
Means of access to town centres over time

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

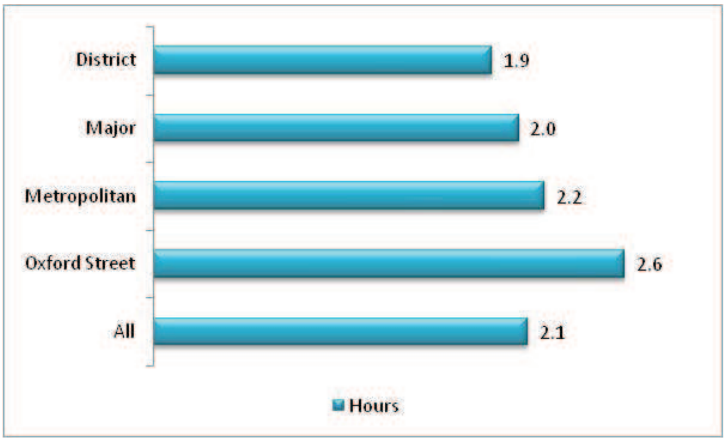
4. Frequency of visiting and spend by town centre type

District town centres are the most frequently visited (13.2 days per month on average); however people do not stay as long (1.9 hrs on average) as they do in the other town centres.

<u>Average monthly visits by town centre type</u>

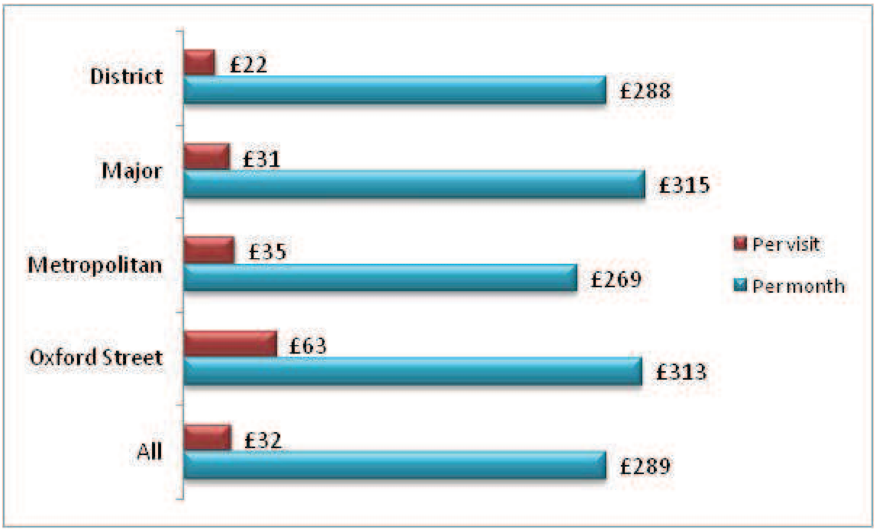


<u>Average time spent in town centres by type</u>



There are also variations in average spend per visit by town centre type but less variation in average monthly spend. Visitors to District town centres typically spend less per visit (£22) due to the type of goods they buy. They are more likely to be buying groceries, confectionary, tobacco, newspapers, and using services e.g. bank, post office – see Section 6 for details . However, because they are visiting more frequently their monthly spend (£288) is around the average.

Average spend by town centre type



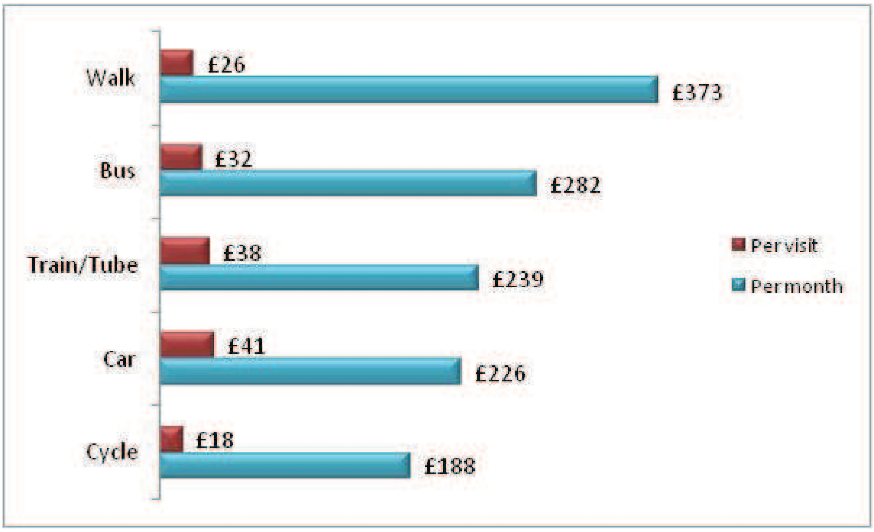
The Major centres, Metropolitan centres and Oxford Street, with their bigger/wider range of shops are visited less frequently but people stay longer and spend more in these locations. Oxford Street is not visited as often as the other town centres, however people stay there longer, and spend more. Typically people go to Oxford Street to shop for clothing, footwear and luxury goods, and on average spend 2.6 hours there.

5. Frequency of visiting and spend by mode

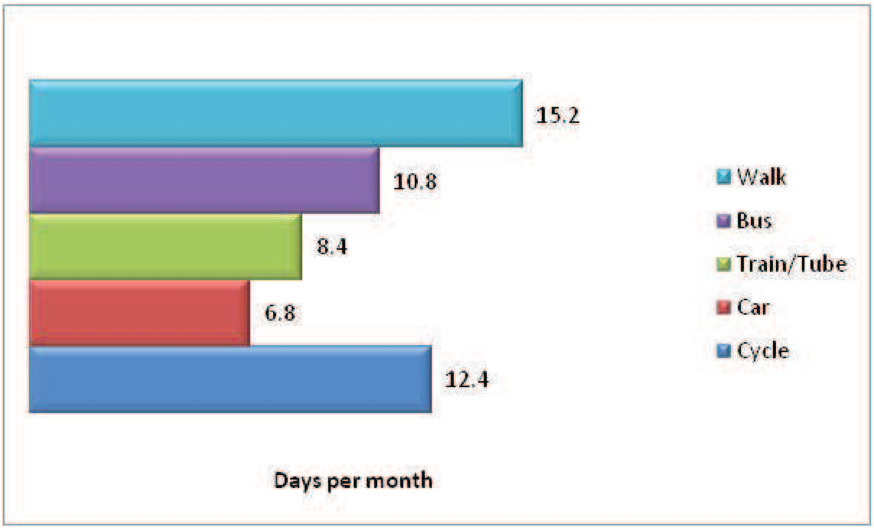
Those who walk or take a bus to town centres contribute the highest proportion of monthly spend in town centres[4]. Although they spend less per visit than visitors arriving by train/tube or car, they are visiting more frequently. Cyclists are the second most frequent visitors to town centres after those who walk, however as their spend per visit is the lowest they spend the least on average per month compared to users of other modes.

[4] Similar research carried out at 2,800 supermarkets in Holland showed that pedestrians and cyclists contribute most to weekly supermarket turnover http://www.fietsberaad.nl/index.cfm?section=repository&repository=Cyclists+spend+as+much+in+supermarket+as+motorists

Average spend by mode[5]



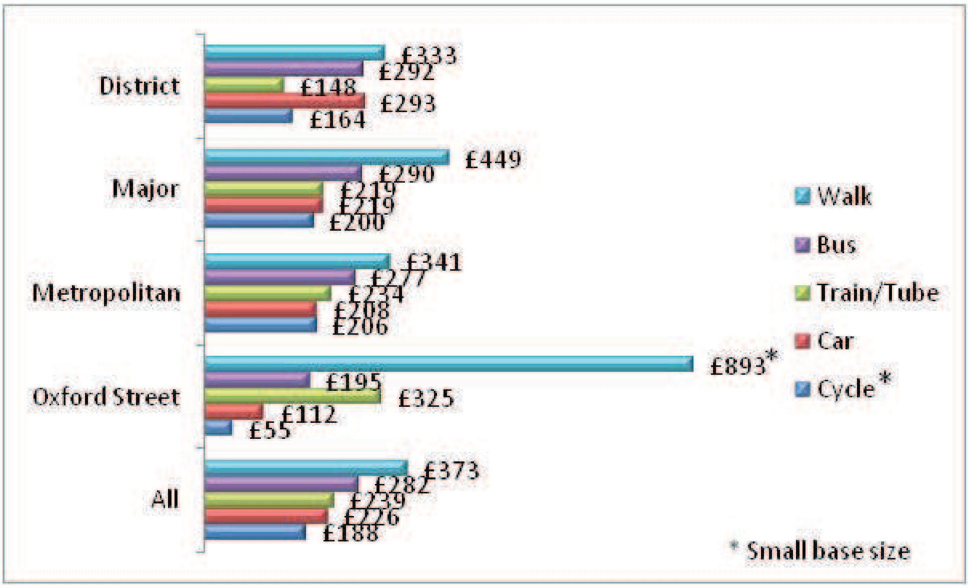
Average monthly visits by mode



With the exception of Oxford Street, this is consistent across all town centres, with pedestrians and bus users spending more per week per head than users of other modes.

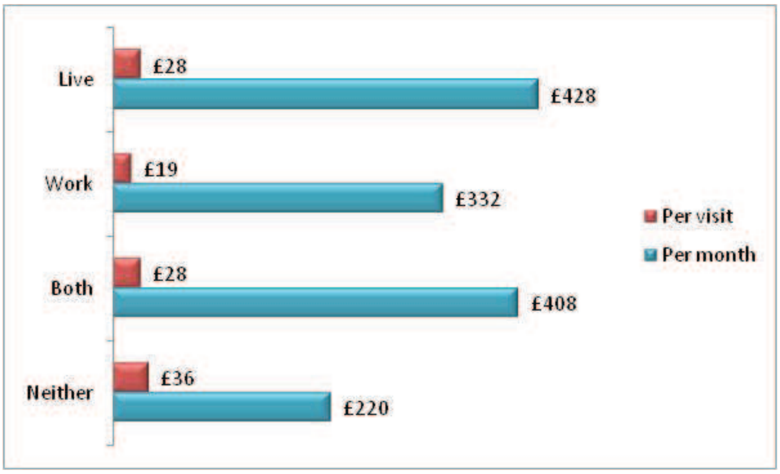
[5] Average monthly spend figures are derived from spend per visit and frequency of visits for each individual respondent, rather than simply multiplying average spend per visit by average number of visits per month

Monthly spend by mode by town centre type



Around two fifths (37%) live and/or work within 10 minutes walk of the town centre they are visiting. The majority (74%[6]) will have walked there, and consequently they spend least per visit but most per month.

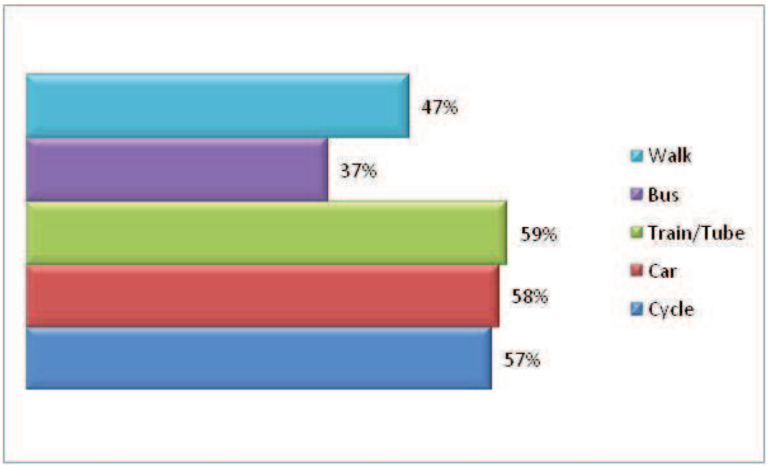
Spend by whether live and/or work within 10mins walk



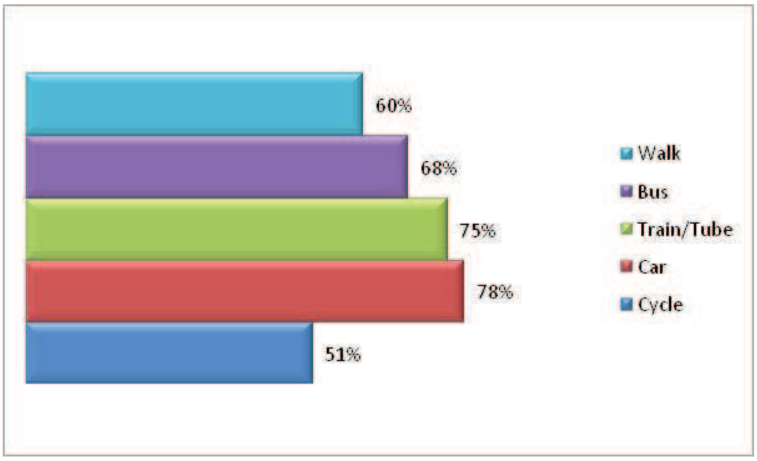
This higher monthly spend and frequency of visits amongst pedestrians and bus users also reflects the fact that they are least likely to shop by internet and less likely to visit other shopping centres.

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

Internet shopping



Visit other shopping centres



The pattern of monthly spend by mode has remained consistent over time, with an increase in average monthly spend by public transport users and pedestrians since 2004, but a decrease in spend amongst car users.

Average monthly spend over time

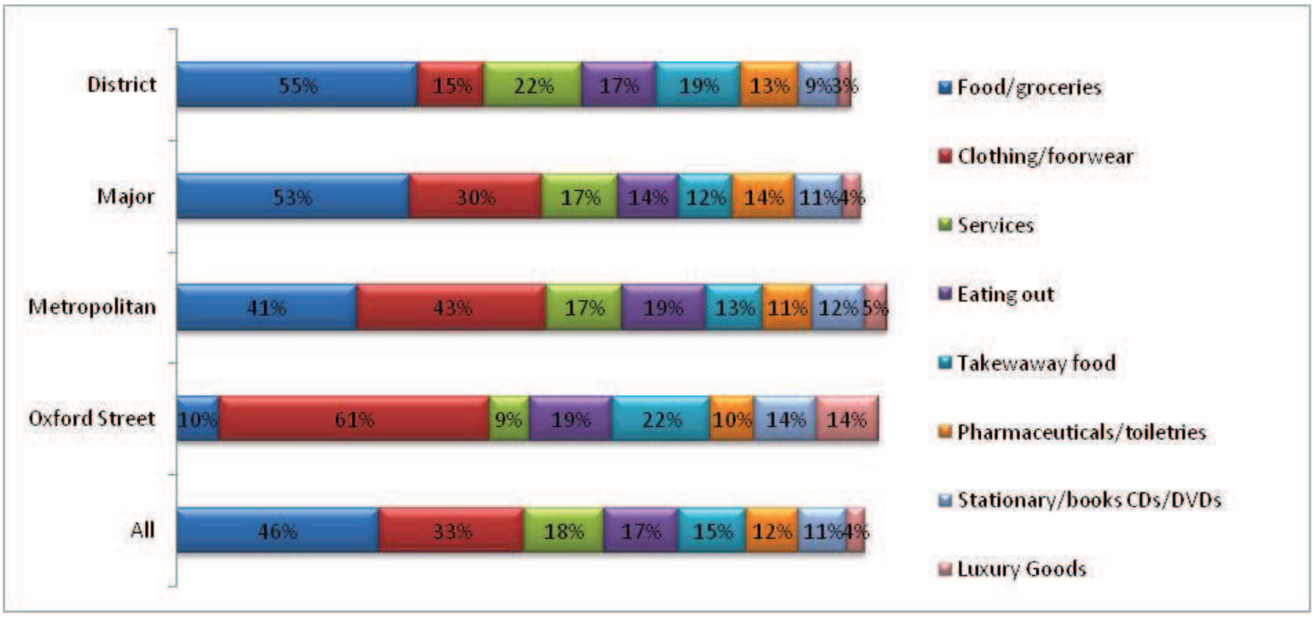
	Total[7]	Bus	Walk	Car	Train/tube	Bicycle
2011	£290	£282	£373	£226	£239	£188
2009	£276	£265	£360	£243	£201	£258
2004	£276	£252	£364	£256	£184	na

[7] Includes spend by Tram/Taxi/Other – not shown separately due to small base size

6. Types of goods purchased

The type of goods purchased inevitably varies by the range of shops available at each location and, as shown below, clear differences were found. Overall, though, the main types of goods purchased at town centres are dominated by food and clothing/footwear.

<u>Types of goods purchased by town centre type</u>



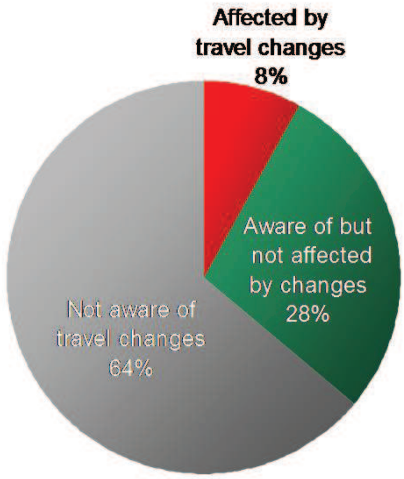
7. Oxford Street and Regent Street area

Shoppers were asked their reasons for visiting the Oxford Street area rather than going somewhere else. The highest response, amongst over a quarter of shoppers, was that "Oxford Street is the best shopping area.

Satisfaction with the layout of the pedestrian crossing at Oxford Circus, and possible disruption to shoppers with the Crossrail development work at the Tottenham Court Road end were examined.

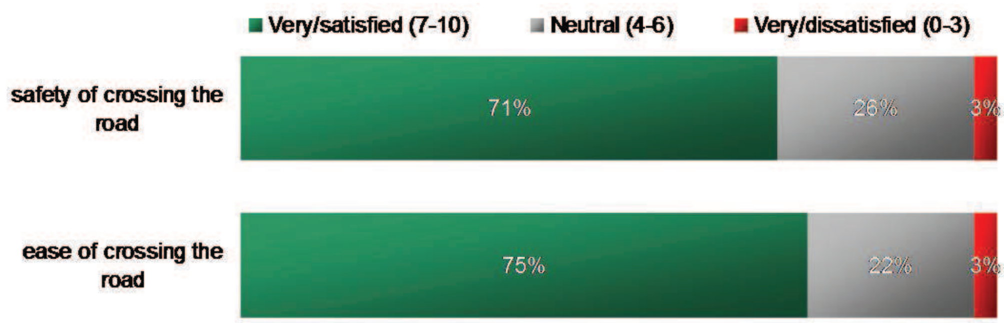
Travel changes at Tottenham Court Road

The travel changes and diversions around Tottenham Court Road have had little impact on visitors to Oxford Street, with nearly two thirds unaware of the changes. Amongst those aware around a half cited Crossrail as the reason for the changes/diversions. Awareness of changes is highest amongst those walking to Oxford Street, whilst bus users are more likely to feel that their journey was affected (38% compared to 13% tube/train and 23% walk).



Diagonal Crossing at Oxford Circus

This diagonal crossing at Oxford Circus was opened in November 2009 to ease congestion for pedestrians by allowing them to cross this intersection diagonally as well as straight ahead. Around half of visitors to Oxford Street had used the diagonal crossing and there were high levels of satisfaction with safety (mean score of 7.8) and ease of use (mean score of 7.9).



Appendix A

Sample and interview locations for 2011[8]

Location	London Plan location type	No of interviews
Bexleyheath	Major	313
Bromley	Metropolitan	364
Camberwell	District	316
Clapham Junction	Major	330
Croydon	Metropolitan	298
Ealing	Metropolitan	299
Greenwich	District	325
Hackney	District	318
Harlesden	District	303
Harrow	Metropolitan	295
Kingston	Metropolitan	319
Oxford Street/Regent Street	International	321
Stratford	Major	313
Wood Green	Metropolitan	331
Woolwich	Major	301

[8] Town Centre locations vary in the 2004 and 2009 Surveys

Appendix B

Base size by mode and town centre type for 2011

Mode	Base size
Walk	1321
Bus	1728
Train/Tube	769
Car	751
Cycle	111
Tram/Taxi/Other	65

Town Centre Type	Base size
International	321
Metropolitan	1905
Major	1258
District	1262

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