West Ealing Travel and Spend Survey
November 2023

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Executive Summary

The West Ealing Liveable Neighbourhood (WELN) Programme aims to transform West Ealing and encourage more people to walk, cycle and use public transport in the area. The council's vision for West Ealing is a resilient, prosperous and healthy neighbourhood where residents and workers feel safe and more likely to make sustainable travel choices.

Ealing Council commissioned Retail Revival Ltd to deliver a travel and spend survey in 2018 to understand how visitors travel to West Ealing, how much they spend in the local economy and how they use and perceive the area. This survey was repeated in November 2023 and the results are presented in this report, it will help to measure the effects of any improvements and schemes that were implemented during the WELN programme.

Methodology

The method comprised 300 face-to-face interviews administered on paper forms in three areas of the town centre with adult visitors to the area.

Key Findings

The key findings were as follows:

- **Reasons for visiting West Ealing**
  - When asked to describe all the reasons for their visit to the area that day, 54% of respondents stated shopping, 21% lived in the area and 16% were eating or drinking out. 21% stated 'other' as their reason for visiting, other reasons included walking the dog, dropping donations at a charity shop, visiting the gym, going to the football, visiting the farmers market, going to the park, and going to a craft workshop.

- **Frequency of visiting West Ealing**
  - 35% of respondents visited the town centre five or more days a week and 22% visited between three and four days a week.

- **How people travel to the town centre**
  - On the day of the interview, most walked (39%) or took a bus (26%). 16% drove.
  - On other days 31% used no other mode of transport than the one used on the day of interview. The most frequently used alternative modes were bus (26%) and walking (13%).
  - 16% used other methods of transport including adult motorized scooter.

- **Bus demand**:
  - 39% used a bus to the area on the day of interview
  - 22% of respondents said they couldn't or wouldn't use the bus more than they already do. 18% said less crowded buses would encourage their greater use of the bus as a means of transport and 14% felt that more frequent buses and making children behave on the buses would make them use them more frequently.
  - 20% of respondents said other things prevented them from using the bus more often, these included: poor driving including harsh breaking, lack of heating, lack of mobile phone charging points, can't use freedom pass before 9am to go to work, few conductors to help passengers, one of the buses has a loud noise at the back, hard to use wheelchair as so many buggies on the buses, intimidation, and not dog friendly.
  - 63% Respondents felt very strongly that there should be stricter enforcement of illegal parking in bus lanes

- **Walking**:
  - 39% of respondents walked to the area on the day of interview.
  - 34% of respondents walked to the area 3 or more days a week. 36% never walked to the area
  - 25% of respondents said nothing would encourage them to walk more often to the area, 28% felt that they would be encouraged by improvements to the quality of footpaths and 28% felt that they would be encouraged by more lighting in pedestrian areas. 17% mentioned other reasons, including prevention of people riding scooters on the pavement, reduction of anti-social behaviour, dealing with puddles and wet leaves as slip hazards, removing unsightly waste and providing enough waste bins for walkers.

- **Cycle demand:**
  - 5% used a bicycle to the area on the day of interview.
  - 87% of respondents never cycled to the area, 6% cycled to the area 2 or more days a week.
  - 77% of respondents said nothing would encourage them to use a bicycle more often in the area.
  - 16% of total respondents said they would use a bicycle more in the area if there was less road traffic.

- **Car use and parking:**
  - 16% of participants drove to the area.
  - 30% of those parked in a store, pub or take-away car park, and 29% parked on a side road.

- **Visitors' perceptions of safety:**
  - 89% felt very safe or fairly safe in West Ealing town centre during the day.
  - 30% felt very safe or fairly safe during the evening or after dark. 26% felt a bit unsafe and 32% very unsafe. 10% never went to the town centre in the evening or after dark.
  - 36% said they had seen less uniformed police officers in the area in the past year and 41% about the same number.

- **Spend and dwell time:**
  - 69% of respondents were shopping for food/groceries, 15% for pharmaceuticals/toiletries and 21% were eating in a café or restaurant.
  - The average spend was £23.50.
  - 30% of respondents were planning to spend between 1 and 3 hours in the area and 35% between 30 and 59 minutes.

- **Desired improvements to the town centre:**
  - The main improvements desired are 'cleaner streets' (48%), 'better quality shops' (81%) to 'remove undesirable element/provide more policing' (65%).
  - 26% Respondents had other ideas for improving the town centre, from these 51 people wanted more support for the homeless.

- **Reactions to ideas for events, facilities, the public realm retail outlets and information provision:**
  - When asked to choose from a list of additional things they would like to see in the town centre, 49% wanted to see 'more leisure facilities', and more public spaces (25%).

- **Keeping the pound in the town:**
  - Other towns competed for visitor spend; 82% of respondents shopped at Ealing Broadway, Westfield (52%) and Central London (40%)
  - 70% respondents shopped online, from those respondents shopping online the majority bought clothing and footwear (77%) books and CDs (75%) and tickets for air, rail and concerts (78%),

1. INTRODUCTION

1.1 Background

The West Ealing Liveable Neighbourhood (WELN) Programme aims to transform West Ealing and encourage more people to walk, cycle and use public transport in the area.

The council's vision for West Ealing is a resilient, prosperous and healthy neighbourhood where residents and workers feel safe and more likely to make sustainable travel choices.

Ealing Council commissioned Retail Revival Ltd to conduct primary research to understand how visitors travel to West Ealing, to determine how they use the high street and to measure their perceptions of the area. The results of this survey will inform future WELN interventions and serves as 'baseline' so that any improvements and schemes that are implemented can be better measured.

The WELN area is shown below (figure 1).

Figure 1: West Ealing Liveable Neighbourhood Area

1.2 Objectives

The objectives of the survey are to assess:

- How visitors travel to the area, how much they spend in the area and how long they dwell in the area
- Visitors' perceptions of safety and cleanliness
- What improvements visitors would like to see in the area
- What would further encourage people to walk, cycle and use public transport in the area

2. METHODOLOGY

2.1 Method

The research was conducted using a quantitative on--street methodology with a sample of visitors to West Ealing town centre.

Face--to--face, on--street interviews were conducted using a paper Interview questionnaire. 300 interviews took place between Wednesday 1st November and Tuesday 4th December 2023.

Interviews were conducted at three enumeration points in order to ensure all parts of the centre were included and all types of visitor were covered as shown in figure 2.

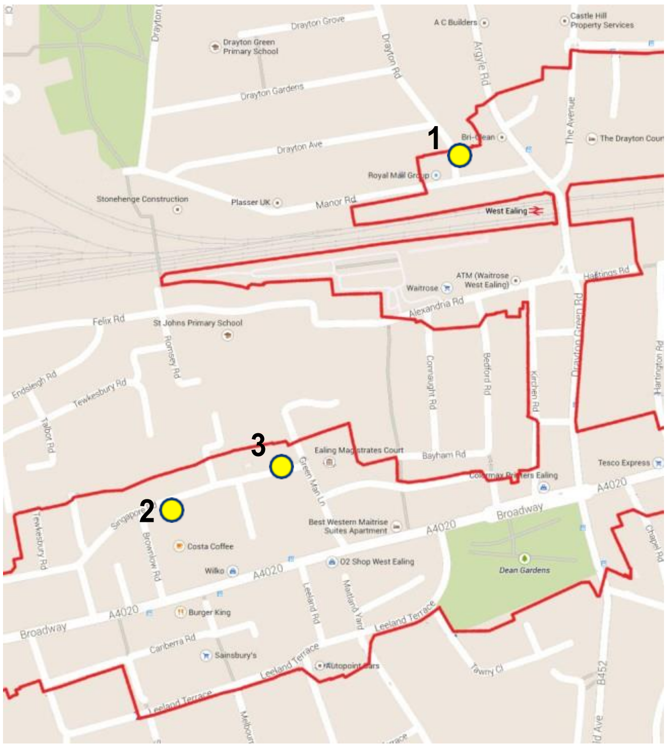

Figure 2: Enumeration points in West Ealing town centre

The interviewer shifts were spread over different days and times in order to provide a spread of different types of visitor to the centre. The shift distribution was broadly 80% weekday and 20% weekend, the times of interview were: weekdays 08:30 to 19:00 and Saturdays 10:00--16:00.

Interviews were conducted with adult visitors to the area. Visitors are described as:

- Anyone visiting West Ealing town centre to use the shops or facilities at the time of interview (i.e. retail based facilities/services, entertainment etc.)

- Those just passing through the town centre at the time of interview. This includes anyone on their way to work and anyone who just happened to live or work in the area and who may or may not be using the shops or other facilities at that time.

The questionnaire covered the following topics:

- Travel to West Ealing town centre
- Cycle demand
- Bus service assessment
- Use of the area
- Spend in area
- Environment and safety
- Potential improvements to the area
- Respondent characteristics

The interviews took between 15 and 45 minutes to complete depending on the responses provided by participants.

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

3. FINDINGS

3.1 Introduction

This section sets out the findings of the West Ealing Liveable Neighbourhood Travel and Spend survey.

3.2 Reasons for visiting West Ealing town centre

When asked to describe all the reasons for their visit to the area that day, the majority of respondents stated shopping (54%). 21% lived in the area and 16% were eating or drinking out. 21% stated 'other' as their reason for visiting, other reasons included walking the dog, dropping donations at a charity shop, visiting the gym, going to the football, visiting the farmers market, going to the park and going to a craft workshop. All reasons for visiting the area are shown in figure 3.

Figure 3: Reasons for visiting West Ealing

ANSWER CHOICES		RESPONSES	
Shopping		54.67%	164
Using service e.g. bank, post office, hairdresser, travel agent		9.67%	29
Using public amenity e.g. court, police station, library, hospital		1.67%	5
Eating/drinking out		16.67%	50
Other social/leisure		2.00%	6
Buying petrol		0.00%	0
Delivering goods		0.33%	1
Window shopping		0.00%	0
Personal business e.g. job interview, church		1.67%	5
General recreation		1.67%	5
Live here		21.00%	63
Work here		11.67%	35
Travelling through the area		7.00%	21
Visiting friends and relatives		10.00%	30
Dropping off/picking up friend or relative (incl. school)		1.67%	5
Other (please specify)	Responses	21.33%	64
Total Respondents: 300			

3.3 Frequency of Visiting West Ealing Town Centre

35% of respondents visited the town centre five or more days a week and 22% visited between three and four days a week (figure 4).

Figure 4: Frequency of visits to West Ealing town centre

ANSWER CHOICES	RESPONSES	
5 or more days a week	35.33%	106
3 or 4 days a week	22.00%	66
2 days a week	16.33%	49
Once a week	14.67%	44
Once a fortnight	4.67%	14
About once a month	2.00%	6
Less than once a month	3.00%	9
First time	2.00%	6
Don't know	0.00%	0
TOTAL		300

3.4 Travel to West Ealing Town Centre

Mode of transport

The most widely used method of travelling to the town centre on the day of the interview was by walking (39%) or by taking a bus (26%), 16% drove to the area and 5% cycled (fig 5).

Figure 5: Mode of access to West Ealing town centre on day of interview

ANSWER CHOICES		RESPONSES	
Drove a car / van / lorry		16.67%	50
Drove a motorbike / moped / scooter		0.00%	0
Drove a delivery vehicle		0.00%	0
Given a lift		3.33%	10
Bus		26.67%	80
Tube / Underground		6.67%	20
Train		0.00%	0
Bicycle		5.33%	16
Walked		39.67%	119
Taxi / Uber / Minicab ASK DROP OFF POINT		0.67%	2
Other (please specify)	Responses	1.00%	3
TOTAL			300

Use of other modes of transport

Respondents were asked what other modes of transport they also used to travel to the area. 31% respondents did not use any other mode of transport. The most popular alternative methods (respondents could make multiple selections) were bus (26%) walking (13%) and other (16%) these respondents used either a skateboard, adult motorized scooter or they used a combination of the transport methods, e.g. train and then bus (figure 6). 8 People declined to answer this question.

Figure 6: Other modes of transport used to access West Ealing town centre

ANSWER CHOICES		RESPONSES	
None of the above		31.16%	91
Car / van / lorry		5.82%	17
Motorbike / moped / scooter		0.34%	1
Bus		26.03%	76
Tube / Underground		4.11%	12
Train		0.34%	1
Bicycle		1.71%	5
Walk all the way		13.01%	38
Taxi / Uber / minicab ASK DROP OFF POINT		0.68%	2
Other (please specify)	Responses	16.78%	49
TOTAL			292

Using a Bus

Those participants using a bus to reach the area on the survey day were asked to rate seven aspects of the service from 0 (extremely dissatisfied) to 10 (extremely satisfied). Over 70% of respondents scored 7 or above for every aspect of the bus service except for one of them- 'level of crowding on the bus', where 63% of respondents scored 7 or above. (Fig 7).

Figure 7: Ratings of bus service from respondents using the bus on the day of interview

	0	1	2	3	4	5	6	7	8	9	10	TOTAL
Length of time waited for the bus	2.33% 2	5.81% 5	3.49% 3	5.81% 5	4.65% 4	6.98% 6	6.98% 6	6.98% 6	19.77% 17	8.14% 7	29.07% 25	86
Comfort of journey	2.33% 2	1.16% 1	1.16% 1	5.81% 5	6.98% 6	3.49% 3	2.33% 2	6.98% 6	29.07% 25	4.65% 4	36.05% 31	86
Value for money	1.16% 1	0.00% 0	1.16% 1	2.33% 2	4.65% 4	11.63% 10	3.49% 3	3.49% 3	12.79% 11	2.33% 2	56.98% 49	86
Ease of getting on and off the bus	1.16% 1	0.00% 0	4.65% 4	4.65% 4	1.16% 1	3.49% 3	5.81% 5	8.14% 7	25.58% 22	6.98% 6	38.37% 33	86
Level of crowding on the bus	4.65% 4	0.00% 0	6.98% 6	2.33% 2	11.63% 10	6.98% 6	3.49% 3	4.65% 4	25.58% 22	4.65% 4	29.07% 25	86
Length of time the journey took	1.16% 1	1.16% 1	0.00% 0	3.49% 3	8.14% 7	9.30% 8	1.16% 1	5.81% 5	18.60% 16	8.14% 7	43.02% 37	86
Convenience of the bus stops	1.16% 1	0.00% 0	1.16% 1	1.16% 1	2.33% 2	3.49% 3	3.49% 3	2.33% 2	19.77% 17	10.47% 9	54.65% 47	86

Respondents were asked what would encourage them to use the buses more often to travel to the area. 22% of respondents said they couldn't or wouldn't use the bus more than they already do. 18% said less crowded buses would encourage their greater use of the bus as a means of transport and 14% felt that more frequent buses and making children behave on the buses would make them use them more frequently.
20% of respondents said other things prevented them from using the bus more often, these included: poor driving including harsh breaking, lack of heating, lack of mobile phone charging points, can't use freedom pass before 9am to go to work, few conductors to help passengers, one of the buses has a loud noise at the back, hard to use wheelchair as so many buggies on the buses, intimidation, and not dog friendly. (figure 8).

Figure 8: Incentives for more frequent bus use

ANSWER CHOICES		RESPONSES	
Nothing GO TO Q14		22.07%	66
More regular / frequent buses		14.05%	42
More reliable buses		11.37%	34
Faster journey		12.04%	36
Direct bus route		5.35%	16
Greater priority given to buses		3.68%	11
Reduce number of cars on the road / less congestion		3.68%	11
Stricter enforcement of illegal parking in the bus lanes		4.35%	13
More seats on buses / less crowded buses		18.06%	54
More comfortable journey		12.71%	38
More shelters at bus stops		8.03%	24
More seating at bus stops		6.69%	20
Bus stop nearer home / destination		3.34%	10
Improved ease of getting on and off buses		5.35%	16
More information about buses		4.35%	13
Safer buses		3.68%	11
Make children behave / school buses		14.05%	42
Cleaner buses		13.71%	41
Greener buses		2.68%	8
Lower fares		6.69%	20
Other (please specify)	Responses	20.07%	60
Total Respondents: 299			

All participants were shown statements relating to buses and the use of bus lanes in the area and they were asked if they agreed with them using a rating from 0 (strongly disagree) to 10 (strongly agree). 292 respondents answered this question. 63% strongly agreed that 'there should be stricter enforcement of illegal parking in bus lanes' and 30% that 'bus stops are conveniently located', (figure 9).

Figure 9: Bus Statement Responses

	0	1	2	3	4	5	6	7	8	9	10	TOTAL
There should be more bus lanes	8.22% 24	2.40% 7	3.77% 11	2.40% 7	5.48% 16	23.29% 68	5.14% 15	8.22% 24	22.60% 66	1.71% 5	16.78% 49	292
There should be stricter enforcement of illegal parking in bus lanes	1.71% 5	0.34% 1	1.37% 4	0.68% 2	2.40% 7	6.85% 20	1.03% 3	3.08% 9	15.07% 44	3.77% 11	63.70% 186	292
Goods vehicles should not be allowed in bus lanes	5.14% 15	0.68% 2	3.42% 10	3.42% 10	9.59% 28	31.85% 93	6.85% 20	6.16% 18	16.10% 47	2.74% 8	14.04% 41	292
Buses should be given priority at traffic lights	10.27% 30	2.05% 6	6.85% 20	5.14% 15	10.96% 32	20.89% 61	5.48% 16	4.11% 12	11.30% 33	2.74% 8	20.21% 59	292
Bus stops are conveniently located	0.00% 0	0.34% 1	0.00% 0	0.00% 0	1.03% 3	14.38% 42	2.40% 7	3.77% 11	21.23% 62	6.85% 20	50.00% 146	292
Bus lanes are of benefit to cyclists	1.71% 5	0.34% 1	2.40% 7	3.42% 10	3.42% 10	38.70% 113	6.85% 20	6.85% 20	21.58% 63	1.71% 5	13.01% 38	292

Walking

All respondents were asked how frequently they walked to the area. 34% of respondents walked to the area 3 or more days a week. 36% never walked to the area (figure 10).

Figure 10: Frequency of walking to West Ealing

ANSWER CHOICES	RESPONSES	
5 or more days a week	20.33%	61
3 or 4 days a week	13.33%	40
2 days a week	9.67%	29
Once a week	8.33%	25
Once a fortnight	4.67%	14
About once a month	2.33%	7
Less than once a month	4.67%	14
First time	0.33%	1
Never	36.33%	109
Don't know	0.00%	0
TOTAL		300

All respondents were asked what would encourage them to walk to the area more often. 25% said nothing would encourage them to walk more often to the area, 28% felt that they would be encouraged by improvements to the quality of footpaths and 28% felt that they would be encouraged by more lighting in pedestrian areas. 17% mentioned other reasons including prevention of people riding scooters on the pavement, reduction of anti-social behaviour, too many puddles, wet leaves as slip hazards and not enough waste bins. (figure 11).

Figure 11: Incentives to increase the frequency of walking to West Ealing

ANSWER CHOICES		RESPONSES	
Nothing		25.08%	75
More readily available information on walking		5.69%	17
Improvements to the quality of footpaths		28.09%	84
More lighting in pedestrian areas		28.09%	84
More CCTV covering pedestrian areas		12.71%	38
Somewhere to shower and change at work		0.00%	0
More attractive environment on the route		13.04%	39
More resting places on the route		17.73%	53
More interesting things to see and do on the route		10.37%	31
Not applicable, I live too far away to walk		15.05%	45
Other (please specify)	Responses	17.39%	52
Total Respondents: 299			

Those respondents that would never consider walking to West Ealing were asked why not. The majority (61%) lived too far away to walk and 17% were not physically able (figure 12).

Figure 12: Reasons for never walking to West Ealing

ANSWER CHOICES		RESPONSES	
I live too far away		61.16%	74
It would not fit with my lifestyle		9.09%	11
I do not feel safe walking on my own		3.31%	4
It would take too long		3.31%	4
The weather is un-predictable		6.61%	8
The air is too polluted		0.00%	0
I have too much to carry		10.74%	13
The walking route is unattractive		0.83%	1
There is not much to see and do on the walking route		2.48%	3
I am not physically able to walk the necessary distance		17.36%	21
I worry that I might not know the necessary route		0.00%	0
Other (please specify)	Responses	9.09%	11
Total Respondents: 121			

Cycling

All respondents were asked how frequently they cycled to the area. 87% of respondents never cycled to the area, 6% cycled to the area 2 or more days a week. (figure 13).

Figure 13: Frequency of cycling to West Ealing

ANSWER CHOICES	RESPONSES	
5 or more days a week	2.35%	7
3 or 4 days a week	2.68%	8
2 days a week	2.01%	6
Once a week	2.01%	6
Once a fortnight	0.67%	2
About once a month	0.67%	2
Less than once a month	1.68%	5
First time	0.00%	0
Never	87.92%	262
Don't know	0.00%	0
TOTAL		**298**

All respondents were asked what would encourage them to cycle to the area more often. 98% of respondents answered the question; 77% of these said nothing would encourage them to cycle to the area more, 16% felt that less road traffic would encourage them to cycle more in the area. (figure 14).

Figure 14: Incentives to encourage more cycle journeys to West Ealing

ANSWER CHOICES	RESPONSES	
(More) cycle lanes on the roads	10.03%	30
(More) dedicated cycle paths	13.38%	40
Less road traffic	16.05%	48
Free on-road cycle training	4.35%	13
Bicycle hire scheme	4.01%	12
(Better) bicycle parking facilities in this area	6.69%	20
(Better) bicycle parking facilities at / near your home	3.01%	9
None of these / Nothing	77.26%	231
Don't know	1.34%	4
Total Respondents: 299		

77% of respondents said they would never consider cycling to the area; they were shown a list of statements and asked to identify which of the statements most summed up the reason why they would never consider cycling to the area. They were able to identify more than one statement. 33% of these respondents did not have access to a bicycle, 22% felt they were unable to cycle the distance and 30% felt they did not feel safe cycling. (figure 15)

Figure 15: Reasons why respondents would never cycle to West Ealing

ANSWER CHOICES		RESPONSES	
I do not have access to a bicycle		33.33%	85
I live too far away		12.94%	33
It would not fit in with my lifestyle		22.75%	58
I do not feel safe cycling		30.98%	79
It would take too long		1.18%	3
The weather is un-predictable		6.27%	16
The air is too polluted		0.39%	1
I have too much to carry		8.24%	21
I am not physically able to cycle the necessary distance		22.75%	58
I worry that I might not know the necessary route		0.00%	0
Other (please specify)	Responses	5.10%	13
Total Respondents: 255			

Driving and Parking

For those who drove or received a lift to the area on the day of the interview most used in store, pub or take away car park (30%), or on a side road (29%) (figure 16).

Figure 16: Parking locations for people driving to West Ealing on the day of the interview.

ANSWER CHOICES	RESPONSES	
Off street residential parking	9.33%	7
Off street private parking (eg driveway)	5.33%	4
Off street municipal / NCP car park	4.00%	3
In store / pub / take-away car park	30.67%	23
On main road	9.33%	7
On side road	29.33%	22
In filling station forecourt	0.00%	0
Other place	2.67%	2
Don't know	9.33%	7
TOTAL		**75**

3.5 Safety

Respondents were asked how safe they feel in the town centre during the day and after dark (figure 17).

- **Daytime**: 86% of participants felt very safe or fairly safe in West Ealing town centre during the day. 10% felt a bit unsafe and 3% felt very unsafe.

- **Evening/after dark**: By contrast 30% felt very safe or fairly safe during the evening or after dark. 26% felt a bit unsafe and 32% very unsafe. 10% never went to the town centre in the evening or after dark.

Figure 17: Feeling safe in the town centre: daytime vs. evening / after dark

ANSWER CHOICES	RESPONSES	
Very safe	34.33%	103
Fairly safe	52.67%	158
A bit unsafe	10.00%	30
Very unsafe	3.00%	9
Never go out in the day	0.00%	0
TOTAL		**300**

ANSWER CHOICES	RESPONSES	
Very safe	6.33%	19
Fairly safe	24.67%	74
A bit unsafe	26.00%	78
Very unsafe	32.67%	98
Never go out in the evening	10.33%	31
TOTAL		**300**

All participants were asked if they had seen more, less or about the same number of uniformed police officers in the local neighbourhood in the past year. 36% of respondents said they had seen less uniformed police officers and 41% about the same number, (figure 18)

Figure 18: Presence of uniformed police officers

ANSWER CHOICES	RESPONSES	
More	5.35%	16
About the same	41.81%	125
Less	36.79%	110
Don't know	16.05%	48
TOTAL		**299**

On the subject of safety, respondents that had cycled in the area, either on the day of the survey or on other days, were asked how safe they felt when cycling in the neighbourhood. 46% felt very or fairly safe and 53% felt a bit or very unsafe, (figure 19).

Figure 19: Cycle safety in West Ealing

ANSWER CHOICES	RESPONSES	
Very safe	4.88%	2
Fairly safe	41.46%	17
A bit unsafe	34.15%	14
Very unsafe	19.51%	8
TOTAL		41

Shopping and Expenditure

Those respondents who listed shopping or accessing services in question 1 were asked to identify the range of things they were shopping for or services they were using in the area. They were able to make multiple selections. 69% of respondents were shopping for food/groceries, 15% for pharmaceuticals/toiletries and 21% were eating in a café or restaurant (figure 20).

Figure 20: The range of things being purchased in West Ealing

ANSWER CHOICES		RESPONSES	
Food / groceries		69.42%	168
Take-away food		5.37%	13
Wine, beer, spirits		11.16%	27
Clothing or footwear		1.24%	3
Confectionery, tobacco, newspapers		11.98%	29
Stationery / books / CDs / DVDs / leisure goods		0.83%	2
Pharmaceuticals / toiletries		15.70%	38
Luxury goods		0.41%	1
Major household goods		0.00%	0
Other household goods (eg electrical goods)		2.48%	6
Travel pass / mobile top up / phonecard		0.83%	2
Services (e.g. hairdresser, dry cleaners, Post Office, travel agent)		9.09%	22
Eating in a cafe or restaurant		21.49%	52
Having a drink in a pub or wine bar		4.13%	10
Going to cinema, theatre, concert, leisure facility etc		0.00%	0
Other (please specify)	Responses	12.81%	31
Total Respondents: 242			

Overall Spend

Respondents were asked how much they spend on an average visit to West Ealing. The greatest number of respondents (19%) spent between £20-£29.99, however the average spend per visit was fairly evenly divided across the middle four spend categories, (figure 22). Just 8% spend £50 or over per visit. The average spend was £23.50.

Figure 22: Average spend per person per visit

ANSWER CHOICES	RESPONSES	
Nothing	1.33%	4
Under £1	0.00%	0
£1 - £4.99	6.33%	19
£5 - £9.99	18.67%	56
£10 - £14.99	14.33%	43
£15 - £19.99	16.67%	50
£20 - £29.99	19.00%	57
£30 - £49.99	13.67%	41
£50 - £74.99	5.67%	17
£75 - £99.99	1.67%	5
£100 - £149.99	1.00%	3
£150 - £199.99	0.00%	0
£200+	0.00%	0
Don't know	1.67%	5
Refused	0.00%	0
TOTAL		300

Dwell Time

Respondents were asked how long they would be visiting the area on the day of interview. 30% of respondents were planning to spend between 1 and 3 hours in the area and 35% between 30 and 59 minutes (fig 23)

Figure 23: Dwell Time

ANSWER CHOICES	RESPONSES	
0-4 minutes	0.33%	1
5-14 minutes	5.67%	17
15-29 minutes	14.67%	44
30-59 minutes	35.33%	106
1-3 hours	30.33%	91
More than 3 hours	12.67%	38
Don't know	1.00%	3
TOTAL		300

3.6 Potential Changes

Preferred changes

Participants were asked what improvements could be made to West Ealing town centre. Respondents' greatest priorities were 'better range of shops' (81%) 'improved shops' (77%), 'cleaner streets' (48%), and to 'remove undesirable element/provide more policing' (65%). 26% Respondents had other ideas for improving the town centre, from these 51 people wanted more support for the homeless. (figure 24).

Figure 24: Identified improvements in West Ealing town centre

ANSWER CHOICES		RESPONSES	
More shops		38.00%	114
Better range of shops		81.67%	245
Improve shops / better quality shops		77.00%	231
Longer shop opening hours		6.33%	19
More leisure facilities e.g. restaurants, bars, cinemas etc		49.33%	148
More pleasant / greener environment		37.00%	111
Cleaner streets		48.67%	146
Reduce pollution		26.00%	78
More public spaces		25.67%	77
Remove undesirable element / more policing		65.00%	195
Less traffic		14.33%	43
High street should be pedestrianised		4.67%	14
Improve pedestrian environment		32.00%	96
More / easier parking		24.33%	73
Better bus service		6.67%	20
Improve access to bus stop locations		2.67%	8
Improved cycle facilities		12.67%	38
More pedestrian crossings		10.67%	32
Nothing		1.67%	5
Don't know		3.00%	9
Other (please specify)	Responses	26.00%	78
Total Respondents: 300			

Competing Shopping Centres

Participants were shown a list of shopping centres in and around London and asked if they visited them. The majority of respondents used Ealing Broadway (82%), Westfield (52%). 5% of respondents did not visit any of the shopping centres (figure 25).

Figure 25: Competing shopping centres

ANSWER CHOICES	RESPONSES	
No	5.33%	16
Ealing Broadway	82.00%	246
Bluewater	2.00%	6
Brent Cross	7.33%	22
Central London	40.00%	120
Chiswick	24.67%	74
Kingston	17.00%	51
Richmond	17.67%	53
Lakeside	0.33%	1
Westfield	52.67%	158
Total Respondents: 300		

Online Shopping

Respondents were asked if they shopped online, 70% respondents shopped online, from those respondents shopping online the majority bought clothing and footwear (77%) books and CDs (75%) and tickets for air, rail and concerts (78%), (figure 26).

Figure 26: Items purchased online

ANSWER CHOICES	RESPONSES	
Food / groceries	30.52%	65
Wine, beer, spirits	14.08%	30
Clothing or footwear	77.46%	165
Books / CDs / DVDs / leisure goods	75.59%	161
Luxury goods	53.52%	114
Major household goods	39.44%	84
Other household goods (e.g. electrical goods)	57.28%	122
Take-away food	57.75%	123
Tickets (air, rail, concert)	78.40%	167
Total Respondents: 213		

3.7 Respondent Characteristics

Physical or other impairment

Respondents were asked to identify from a list if they had long--term physical or other impairments, which limited their daily activities. 78% of respondents had no disability, 12% had mobility impairment, 1% used a wheelchair. (figure 27).

Figure 27: Physical or other impairments

ANSWER CHOICES		RESPONSES	
No, none		78.33%	235
Mobility impairment		12.33%	37
Visual impairment		0.67%	2
Hearing impairment		0.67%	2
Learning disability		0.67%	2
Mental health condition		5.00%	15
Serious long term illness		6.67%	20
Refused		0.67%	2
Other (please specify)	Responses	0.00%	0
Total Respondents: 300			

Items Carried

The interviewer observed what the respondent was carrying. 38% of respondents were carrying shopping bags or a shopping trolley and 44% were carrying nothing, (figure 28).

Figure 28: Items Carried

ANSWER CHOICES	RESPONSES	
Shopping bag(s) / shopping trolley	38.10%	112
Buggy / Pram	4.42%	13
Carrying a child / baby	3.06%	9
Suitcase / rucksack	11.56%	34
Other large / awkward object	2.38%	7
Nothing	44.22%	130
Total Respondents: 294		

Age

There was a fairly even age spread across the ages with fewer in the younger and older age groups (fig 29)

ANSWER CHOICES	RESPONSES	
16 -24	8.33%	25
25 - 34	16.00%	48
35 - 44	17.67%	53
45 - 54	10.67%	32
55 - 59	8.67%	26
60 - 64	10.00%	30
65 - 74	17.00%	51
75 or over	9.67%	29
Refused	2.00%	6
TOTAL		**300**

Gender

35% of respondents were male and 65% were female.

Employment status

Most participants were working (43%) or retired (27%), (figure 30).

Figure 30: Employment Status

ANSWER CHOICES		RESPONSES	
Working full time (30+ hours a week)		35.12%	105
Working part time (less than 30 hours a week)		8.03%	24
A full time student		3.68%	11
A part time student		1.00%	3
Not working, but looking for work		6.02%	18
Not working and not looking for work		6.02%	18
Retired		27.09%	81
Looking after family and home		8.03%	24
Refused		2.34%	7
Other (please specify)	Responses	2.68%	8
TOTAL			299

Ethnicity

60% of participants were White and 15% were Asian/British Asian, and 16 Black/Black British (figure 31).

Figure 31: Ethnicity

ANSWER CHOICES	RESPONSES	
White	59.33%	178
Asian or Asian British	15.00%	45
Black or Black British	16.33%	49
Mixed	3.67%	11
Chinese or Other Ethnic Group	1.33%	4
Don't know	0.00%	0
Refused	4.67%	14
Total Respondents: 300		

Household income

46% of all participants were unable or unwilling to identify their total gross annual income. 10% of participants had an annual income of between £25,000 and £34,999, (figure 32).

Figure 32: Household income

ANSWER CHOICES	RESPONSES	
Under £5,000	1.00%	3
£5,000 to £9,999	2.33%	7
£10,000 to £14,999	4.00%	12
£15,000 to £19,999	4.33%	13
£20,000 to £24,999	6.00%	18
£25,000 to £34,999	10.00%	30
£35,000 to £49,999	8.67%	26
£50,000 to £74,999	8.67%	26
£75,000 to £99,999	2.67%	8
£100,000 or over	5.67%	17
Don't know	21.67%	65
Refused	25.00%	75
TOTAL		**300**

Appendix 1 Questionnaire

EP:
1
2
3

West Ealing Travel and Spend Survey

1

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

Introduction

I am conducting a survey on behalf of Ealing Council on travel to this area and use of the West Ealing town centre. The results will be used to inform the Liveable Neighbourhood Programme, which aims to transform the area and encourage more people to walk, cycle and use public transport in West Ealing. 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. All the questions I am going to ask you refer to the area shown on this map. **SHOW MAP** Please look at this card and tell me which of these best describes your reasons for visiting this area on this occasion today? **SHOWCARD 1. CODE ALL MENTIONED IN Q1 BELOW**

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

Q2. **IF MORE THAN ONE MENTIONED IN Q1 ASK:** And what is your ONE main reason for visiting this area on this occasion today? **CODE ONE ACTIVITY IN SECOND COLUMN Q1 ABOVE**

Details of visiting area

Q3. **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

Mode of transport

Q4. How did you travel to this area today? **PROBE FOR MAIN METHOD. 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 Walked
10 Taxi /Uber/ minicab **ASK DROP OFF POINT**
11 Other **WRITE IN** ....

Q5. How frequently do you use **[MODE OF TRANSPORT AT QUESTION 4)** 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

Q6. What other modes do you use to travel to this area?

1 Car / van / lorry
2 Motorbike / moped / scooter
3 Bus
6 Bicycle
7 Walk all the way
8 Taxi / Uber/minicab **ASK DROP OFF POINT**

4	Tube / Underground	9	Other **WRITE IN** ....
5	Train		

Q7. **IF BUS AT Q4 ASK:** How would you rate the following aspects of your journey by bus today? showcard 2. **TICK START AND ROTATE. READ OUT**

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

Q8. **ASK ALL** Which of the reasons on this card describe why you decided to use .... **(MODE OF TRANSPORT USED AT Q4)** rather than any other method of transport? **SHOWCARD 3. CODE ALL MENTIONED UNDER Q8**

1	Cheaper/less expensive	11
2	Quicker...	12
3	More direct..	13
4	Had heavy bags/shopping to carry	14
5	Travelling with children....................................	15
6	More relaxing/comfortable	16
7	Easier/more convenient.....................................	17
8	Safer	18
9	Avoids parking difficulties	19
10	Going to more than one place	110
11	Live very close by	111
12	Need/enjoy exercise/healthy	112
13	No car/can't drive	113
14	Weather issues	114
15	Avoid the congestion charge..............................	115
16	Don't know	1

16

17 Other (**PLEASE WRITE IN**) 117

....

...

Q9. **IF MORE THAN ONE ANSWER AT Q8 ASK** And which ONE reason best describes why you decided to use that method? Circle code in second column above for one reason only

---

Q10. **ASK ALL** How frequently do you travel by bus in this area?

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

Q11. Which of the things shown on this card would encourage you to use buses more often in this area?
SHOWCARD 4. PROBE. CODE ALL MENTIONED UNDER Q11

1 Nothing **GO TO Q14...**1

2 More regular / frequent buses 1
2

3 More reliable buses.. 1
3

4 Faster journey 1
4

5 Direct bus route 1
5

6 Greater priority given to buses 1
6

7 Reduce number of cars on the road / less congestion 1
7

8 Stricter enforcement of illegal parking in bus lanes 1
8

9 More seats on buses / less crowded buses 1
9

10 More comfortable journey 1
10

11 More shelters at bus stops.. 1 11
12 More seating at bus stops... 1 12
13 Bus stop nearer home/destination .... 1...13
14 Improved ease of getting on and off buses 1 14
15 More information about buses 1 15
16 Safer buses 1 16
17 Make children behave/school buses 1 17
18 Cleaner buses 1 18
19 Greener buses 1 19
20 Lower fares 1 20
21 Other **(PLEASE WRITE IN)** 1 21

Q12. **IF MORE THAN ONE ANSWER AT Q11 ASK** And which ONE change would be most likely to encourage you to use buses more? **SHOWCARD 4 CIRCLE ONE CODE IN SECOND COLUMN ABOVE FOR ONE REASON ONLY**

Q13. How strongly do you agree or disagree with each of the following statements about this area?
SHOWCARD 5. TICK START AND ROTATE. READ OUT

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

Q14. **ASK ALL** How frequently do you walk 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	Never
5	Once a fortnight	10	Don’t know

Q15. Which of the things shown on this card would encourage you to walk more often to this area?

SHOWCARD 6. PROBE. CODE ALL MENTIONED UNDER Q15

1 Nothing 1
2 More readily available information on walking routes 1 2
3 Improvements to the quality of footpaths 1 3
4 More lighting in pedestrian areas 1 4
5 More CCTV covering pedestrian areas 1 5
6 Somewhere to shower and change at work 1 6
7 More attractive environment on the route 1 7
8 More resting places on the route... 1 15
9 More interesting things to see and do on the route 1 16
10 Not applicable, I live too far away to walk............................ 1 18
11 Other **(PLEASE WRITE IN)** 1 21

Q16. If you would never consider walking to this area, which of the following statements most sums up the reasons for this? **SHOWCARD 7. PROBE. CODE ALL MENTIONED UNDER Q16**

1 I live too far away 1
2 It would not fit in with my lifestyle...............................1 .. 2
3 I do not feel safe walking on my own 1 3
4 It would take too long 1 4
5 The weather is un-predicable.. 1 5
6 The air is too polluted 1 6

7 I have too much to carry 1
7
8 The walking route is unattractive 1
8
9 There is not much to see and do on the walking route 1
9
10 I am not physically able to walk the necessary distance 1
10
11 I worry that I might not know the necessary route 1
10
12 Other **(PLEASE WRITE IN)** 1
11

Q17. **ASK ALL** How frequently do you cycle 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	Never
5	Once a fortnight	10	Don't know

Q18. Which of the things shown on this card would encourage you to cycle more often in this area?
SHOWCARD 8. 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

Q19. If you would never consider cycling to this area, which of the following statements most sums up the reasons for this? **SHOWCARD 9. PROBE. CODE ALL MENTIONED UNDER Q19**

1 I do not have access to a bicycle
2 I live too far away ....
3 It would not fit in with my lifestyle
4 I do not feel safe cycling..
5 It would take too long ....
6 The weather is un-predicable...
7 The air is too polluted ....
8 I have too much to carry ....
9 I am not physically able to cycle the necessary distance
10 I worry that I might not know the necessary route ....
11 Other (Please write in) ....

Q20. **ASK IF DROVE OR WAS GIVEN LIFT** Where did you park your vehicle? Was it... **READ OUT**

1 Off street residential parking	5 on main road
2 On main road	6 on side road
2 Off street private parking (eg driveway)	7 In filling station forecourt

3 Off street municipal/NCP car park 8 other place
4 In store/pub/take-away car park 9 don't know

Q21. As a car user do you think there are:

1 1. Too many parking spaces 2. Not enough parking spaces 3. Enough parking spaces

2 On a scale of 1-10 (1 being easy and 10 being very difficult) how easy is it to access this area by car?

Safety

Q22. How safe do you feel in this neighbourhood during the day?

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

Q23. How safe do you feel in this neighbourhood during the evening/after dark?

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

Q24. In the past year would you say you have seen more, less or about the same amount of uniformed police officers (that is, police men and women and Police Community Support Officers) in this local neighbourhood?

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

Q25 **IF CYCLIST ASK:** How safe do you feel when cycling in this neighbourhood?

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

Q25.

Shopping and expenditure in the area

Q26. Could you look at this card and tell me the range of things you are shopping for or services you are using in this area today? **SHOWCARD 10. 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

Q27. How much do you typically spend on average per visit to this area? **SHOWCARD 11**

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

Q28. 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		

Q29. In what ways do you think this area could be improved? **SHOW MAP. CODE ALL MENTIONED IN COLUMN A BELOW. SHOWCARD 12 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

16 Improve access to bus stop locations 16 16
17 Improved cycle facilities 1717
18 More pedestrian crossings..18 18
19 Other 19 19
20 Nothing 20
21 Don't know 21 21

Q30. Do you go to any of these shopping centres in and around London? **SHOWCARD 13. CODE ALL MENTIONED**

1 No 1
2 Ealing Broadway.................................... 1
3 Bluewater 1
4 Brent Cross.. 1
5 Central London 1
6 Chiswick.. 1
7 Kingston.. 1
8 Richmond 1
9 Lakeside.. 1
10 Westfield 1

Q31. How you shop online?
1 Yes 2 No

Q32. What kind of goods do you shop for online? **SHOWCARD 14, CODE ALL MENTIONED**

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

Classification

Q33.
Q33. Do you have any long term physical or other impairment which limits your daily activities or the work you can do, including problems due to age? **SHOWCARD 15, CODE ALL MENTIONED**

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

Q34. Do you use a wheelchair for travelling?
1 Yes 3 Refused
2 No

Q35. Is the respondent carrying any of the following...? **CODE BY OBSERVATION**
1 Shopping bag(s) / shopping trolley 4 Suitcase / rucksack

2	Buggy / pram	5	Other large / awkward object
3	Carrying a child / baby	6	Nothing

Q36. 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

Ealing Council and will not be disclosed to third parties. It will be used by Ealing Council only for this study.

Which of the following age groups do you fall into? **SHOWCARD 16**

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

RECORD GENDER

1 Male 2 Female

Q37. Which of the following best describes your working status? **SHOWCARD 17**

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

Q38. To which of these ethnic groups do you consider you belong? **SHOWCARD 18**

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

Q39. What is your total gross annual household income? This is income from work and any other sources such as benefits and pensions, before deductions e.g. income tax, National Insurance. **SHOWCARD 19**

1Under £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

Thank you very much for taking part in this survey. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

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: