Southwark Council

Southwark high streets: **Lordship Lane**

www.southwark.gov.uk

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1. Introduction

This report provides the analysis of the retail audit, footfall observations and interviews conducted on Tuesday 10th and Saturday 14th February 2015 on Lordship Lane.

1.1 Summary of Findings

The Retail Mix: Lordship Lane has an above average number of shops and services compared with the other Southwark high streets surveyed. It also has a broad selection of retail categories including comparison goods, convenience stores, specialist grocery, multiple grocery, banking and other services as well as take-away outlets and coffee shops. There is competition within these categories, and some national brand names are present.

The People on Lordship Lane: The available consumers are older than the borough average, and more likely to be in a family home with children. They are more affluent being in professional or managerial occupations although almost a quarter of respondents were currently not working. The local population is as likely to live in an owned as a rented home.

Footfall Densities: The footfalls observed on Lordship Lane put it in the middle tier of observed high streets after Peckham, Borough and Camberwell, that is with average hourly densities of around 800. Of the two days observed, unusually in this survey, Saturday footfall was far higher than Tuesday's.

Consumer Behaviour: The visitors to Lordship Lane come frequently – every other day, or three times per week. They are largely local and spend above the average in time and money than the people on other high streets. Most will spend something, whatever other reason they have for being there. They travel on the bus, and by car, with fewer than expected walking.

Attitude & Usage: One motivation for being on the high street is convenience: few visit to patronise a specific business. But attitudes are polarised so that the main comment from about a third of respondents was that the choice of shops is limited. A further third were drawn to Lordship Lane *because of* the choice of shops. For the area as a whole there is some community feeling identified, but given the highly local nature of the visitors this could be developed to the benefit of overall footfall levels.

Marketing interventions to date have had some effect. There is some awareness of local advertising and of some local events, but it is not pronounced. Awareness is split between commercial and community messages, and the main channels through which the population can be reached remain traditional local press. There is some awareness and usage of online bulletin boards. The uptake of marketing promotions, especially digital marketing tools, is extremely low. Just 8% of respondents said they would be using a coupon on the day, while penetration of other mechanics was substantially lower.

2. The Retail Mix

The mix of different types of retail outlet on any high street characterises the nature of the shopping experience and is believed to affect footfall densities in regard to the diversity of the offer (the number of different categories of offer available), the quality or attractiveness of those offers, and their concentration. In addition, certain categories of retail draw in trade because they are strongly branded or because, like some multiple grocery retail with high street parking, they can become a destination store.

Whereas the mix of store types in a shopping mall is usually defined by one owner, on the high street the retail mix is rather harder to control and to adjust, although of course some classes of business require planning permission or licencing. As a result, high street footfalls may gradually decrease as a result of an evolving sub-optimal retail mix.

An audit was taken of the retail stores on the high streets identified in the study, and organised into 26 pre-defined categories. In the analysis these categories were further reduced into the seven identified in Table 1 which compares the number and types of stores identified on Lordship Lane with the distribution seen across all eight high streets in the study. In total 114 different businesses were counted on the identified section of Lordship Lane. This is over 40% higher than the survey average indicating a broad range of retail choices. Of the 26 categories in the analysis 22 were represented on Lordship Lane, giving a diversity index of 0.85, high for the survey, and indicating a diverse and competitive business environment.

Table 1: Retail mix comparison; Lordship Lane

	Lordship Lane	Average
Number of Stores:	**114**	**80**
	%	%
Foodservice *Restaurants, Cafes, Coffee Shops*	**30**	**25**
Financial Services *Banks, Building Societies, Post Office, Loan Shops*	**16**	**11**
Mixed Non-Food Retail *Clothing, Shoes Accessories, DIY, Toys*	**31**	**25**
Personal Care *Hairdressing, Beauty/Tanning shops, Doctors*	**11**	**13**
Technology *Phone Shops, PC repairs, Electricals*	**0**	**4**
Entertainment *Betting Shops, Libraries*	**4**	**4**
Grocery *Multiple & specialist independent retail*	**9**	**17**
		100

The mix on Lordship Lane was observed to be highly skewed away from grocery by number of outlets but the area has two small multiple supermarkets and a number of specialist grocery shops along its length, along with higher than average numbers of foodservice establishments, banks, estate agency services and comparison goods stores. There are no technology stores.

Lordship Lane is a busy and extensive community retail centre and one of the middle-tier locations by footfall density.

Missing or under-represented offers on this stretch of high street include:

- Garage
- Sports goods
- Library

There are however enough stores in each category to create a range of choice in quality and price (for example in grocery retail an Iceland, a farm shop and a wine merchant), which generates more reasons for more people to visit the high street more often.

3. Respondent Demographics

The students interviewed 103 respondents over two days, Tuesday and Saturday. The demographic make-up of the sample is described in this section, and compared with the Southwark population and with the overall survey results.

Table 2: Demographics

n = 103	Average %	Lordship Lane %
18 – 24	18	10
25 – 34	30	28
35 - 44	23	27
45 – 54	15	21
55 – 64	7	7
65 – 74	5	7
75 or older	2	0
Male	47	43
Female	53	57

Rather older than average…

The population of Southwark is young with 42% aged between 20 and 39 (against 35% in London). Between 50 and 64 it is close to the London average (13% against 14%), and over 65's are under-represented (8% against 11%). It is evenly divided by gender.

Table 2 compares the population banding across the entire survey with the respondents on Lordship Lane. It is clear to see that the population on this high street is somewhat older than the Southwark average with the biggest variance seen in the 45 to 54 age band.

Table 3: Ethnicity Overview

	Average %	Southwark %	Lordship Lane %
White	61	54	74
Black	19	26	10
Asian	8	10	7
Mixed	9	6	10
Other	1	3	0

Predominantly white or of mixed ethnicity…

Table 3 compares the ethnicity of respondents on Lordship Lane with the survey averages and with Southwark population data. The visitors on Lordship Lane were rather more likely to fall into broadly white categories (74% against a Southwark average of 54%), or of mixed ethnicity.

In terms of education, the population on Lordship Lane was considerably better educated than the average for the borough, with a pronounced skew towards those with a university degree.

Table 4: Education

	Average %	Lordship Lane %
Compulsory Education at School	14	9
Vocational or College or 6th Form	31	25
University	55	66

…and two thirds are graduates

Visitors to Lordship Lane showed a polarity in occupation (Table 5). While 24% were not currently working, close to the average for the borough, a third described themselves as professionals, the highest proportion in this band across the survey. A further 10% described their occupation as managerial.

Table 5: Occupation

	Average %	Lordship Lane %
Professional occupations	20	**35**
Not currently working	23	**24**
Sales and customer service occupations	17	**13**
Managers, directors and senior officials	10	**10**
Skilled trades occupations	6	**7**
Administrative and secretarial occupations	8	**5**
Associate professional and technical occupations	4	**4**
Caring, leisure and other service occupations	10	**3**
Process, plant and machine operatives	2	**0**
Elementary occupations	2	**0**

A pronounced skew towards affluence.

Household structure (Table 6) shows that the area has a higher than average proportion of married or cohabiting households, and a skew towards larger households including those with two or more children.

Table 6: Household Structure

	Average %	Lordship Lane %
Single	41	**31**
Married	35	**46**
Civil Partnership	2	**6**
Living with partner	12	**7**
Divorced	4	**5**
Widowed	2	**1**
Separated	2	**1**
Number of Adults in the home:		
1	28	**21**
2	51	**48**
3	13	**13**
4 +	7	**18**
Number of 13-17s in the home:		
0	81	**80**
1	12	**8**
2 +	7	**12**
Children under 13:		
0	78	**79**
1	13	**7**
2	7	**8**
3 +	2	**6**

Families and larger households with children living at home

Finally, Table 7 describes the ways in which the survey respondents occupy their homes: the largest proportion are in rented accommodation, and while this is typical of the borough, the skew on Lordship Lane is away from the average, while home ownership through mortgage or housing association is rather more pronounced. In short, Lordship Lane is one of the more affluent retail areas investigated.

Table 7: Household Occupancy

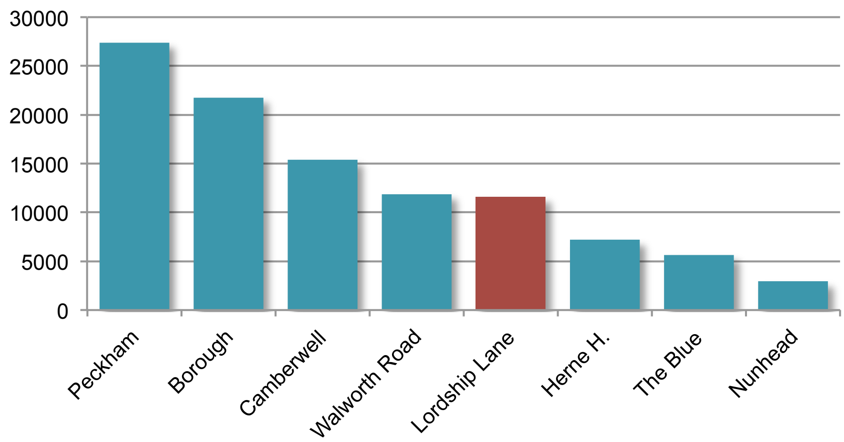
	Average %	Lordship Lane %
Rent	52	46
Own it outright or with a mortgage	31	44
Shared ownership or Housing Association	6	2
Live there rent free	5	3
Other/ No response	7	6

Rental is important but more than expected own their home

4. Findings: Footfall Distributions

In footfall densities, Lordship Lane is among the mid-tier high streets observed. Over the course of two days over 11,000 pedestrians were counted passing on either side of the street. This amounts to an average footfall of 830 people per hour, or about half the flow at Borough High Street. Figure1 compares the footfall at Lordship Lane with the high streets in the study. Peckham, Camberwell and Borough have higher densities, but are different in character.

Figure 1: Comparative total footfall over two days: February 2015



4.1 Weekend & Weekday Ratio

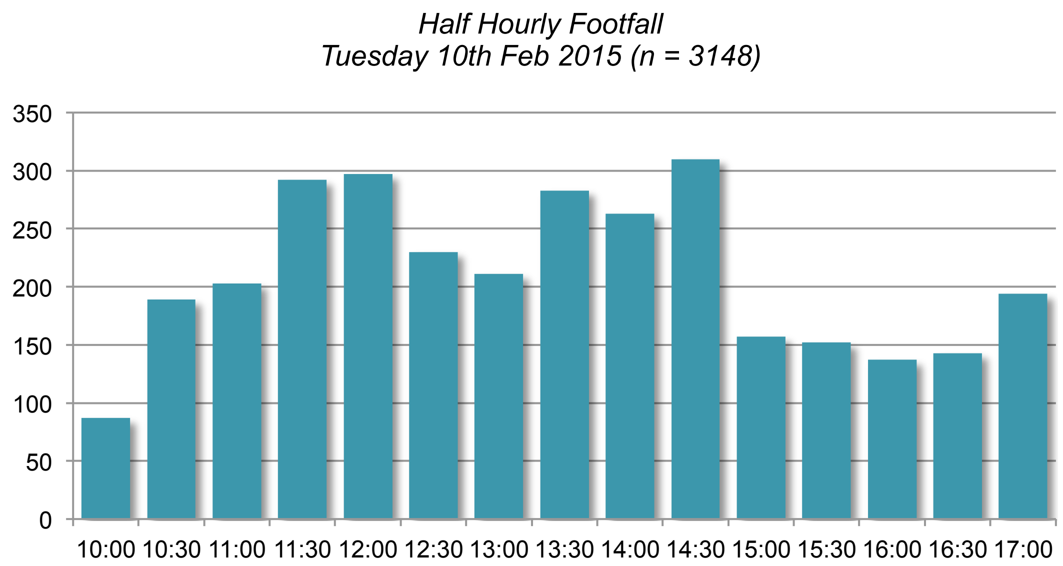
Table 8 highlights the density ratio between Saturday and Tuesday. Of all eight high streets observed Lordship Lane shows the most pronounced variance between weekday and weekend, with almost three times the footfall on Saturday compared with Tuesday. The counts were investigated and appear to be valid; the researchers also commented on the noticeably quieter conditions on Tuesday, and the far busier atmosphere on Saturday.

Table 8: Comparative footfall by day: February 2015

Observations recorded continuously from 10.00 to 17.00 on each day. Hourly data rounded

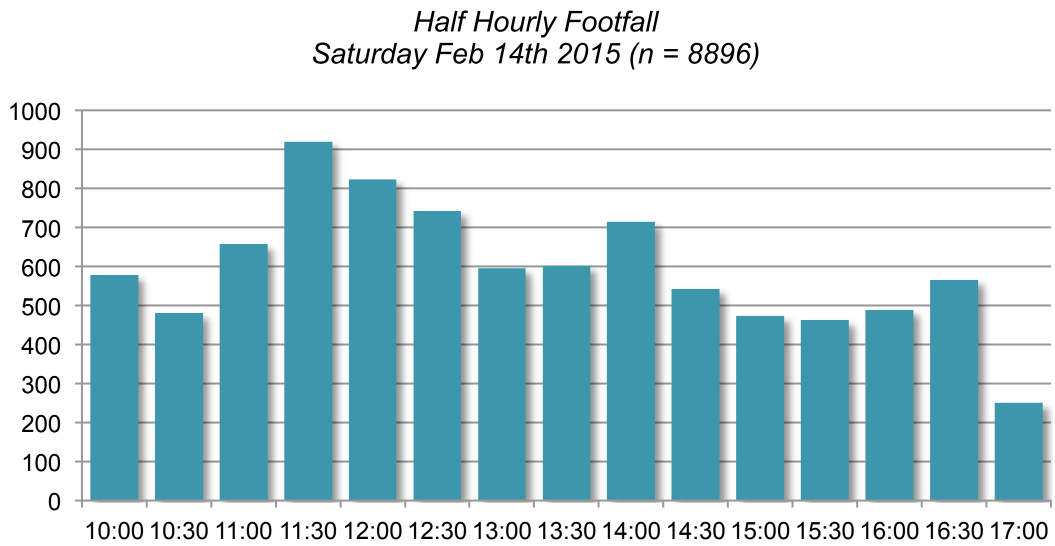
	Tuesday	Saturday	Total	Average Hour
Peckham (Rye Lane)	10778	16599	27377	1900
Borough High Street	11569	10204	21773	1600
Camberwell	**7759**	**7637**	**15396**	**1100**
Walworth Road	5527	6369	11896	850
Lordship Lane	2954	8645	11599	830
Herne Hill	2851	4330	7181	500
The Blue	2677	2945	5622	400
Nunhead Lane	1282	1648	2930	200
	45397	**58377**	**103774**	

4.2 Footfall Count: Tuesday



Tuesday footfall on Lordship Lane peaked twice – first from late morning, between 11.30 and 12.30, and then once again between 13.30 and 15.00. After that, densities halved for the remainder of the observation period with a small upwards spike at 17.00.

4.3 Footfall Count: Saturday



On Saturday the traffic built up rather more dramatically from a slow start, to peak at around 11.30. From there densities declined steadily across the day, with two minor peaks at 14.30 and at 16.30.

The pattern suggests that many local shoppers may use the high street in the morning at the weekend and spend the afternoons elsewhere.

5. High Street Catchment Area, Travel Time & Method

It is useful to know from how far afield the visitors to Lordship Lane are being drawn. The interviewers collected data on home postcodes, travel time and mode of transport.

Over half of the respondents (57%) on Lordship Lane lived in local postcodes, SE22 (29%), which surrounds the high street, SE15 (17%) just to the north, and SE12 (11%) which is some way away. The remainder lived in 29 further and widely dispersed postcodes, spread largely but not exclusively from around South East London.

Respondents were largely happy to provide at least the first part of their postcode and response rates to the question on this basis were on average over 90%. Rather fewer were willing to supply a full code; it is not possible to drill further into the catchment area with any confidence.

Table 9: Catchment Area

Lordship Lane	
	%
SE22	29
SE15	17
SE12	11
SE5	5
SE13	4
SE23	3
SE16	2
SE24	2
SE25	2
SW2	2
BR3	1
CR0	1
CR4	1
E14	1
LU3	1
SE1	1
SE10	1
SE14	1
SE18	1
SE2	1
SE20	1
SE21	1
SE4	1
SE6	1
SW12	1
SW15	1
SW17	1
SW19	1
SW22	1
W6	1
WC1N	1

5.1 How local?

Being “local” is an important perception in relation to the most frequent choice of high street destination. In Table 10 the response to the question “Do you live or work locally” shows that 90% of the visitors interviewed considered themselves to be local to Lordship Lane by virtue of where they lived or worked. The proportion claiming to live locally is around the average for the total survey, and travel time for most (75%) was under 30 minutes, with a further 19% travelling for up to an hour to be there on that day.

Table 10: How Local?

Where have you travelled from? How long did it take you?

	Average %	Lordship Lane %
Living Locally	52	51
Working Locally	14	22
Both	17	17
Those who travelled...		
Less than 30 minutes	74	75
Between half & one hour	22	19
1 to 2 hours	3	6
Over 2 hours	1	0

Visitors to Lordship Lane are a bit more likely *to live nearby*.

5.2 How did they get here?

The high street is well connected for buses travelling through South East London almost a third had travelled to Lordship Lane by bus, ten points above the average for the survey. Rather fewer had walked, which could indicate either greater distance or more shopping was involved. Table 11 helps to confirm the picture of the typical visitor however, since almost a quarter had arrived by car, twice the average and with the exception of Walworth road, the highest proportion for any Southwark high street.

The picture is one of a local population using the centre because it is convenient and easy to access, but with rather more than expected choosing to use a car to get there and back.

Table 11: Transport

What was your main form of travel to get here today?

	Average %	Lordship Lane %
Walk	48	**37**
Bus	22	**31**
Car	11	**22**
Cycle	6	**7**
Taxi	1	**2**
Train	6	**1**
Tube	5	**0**
Other	0	**0**

- almost everybody arrives ***on foot, bus or by car***

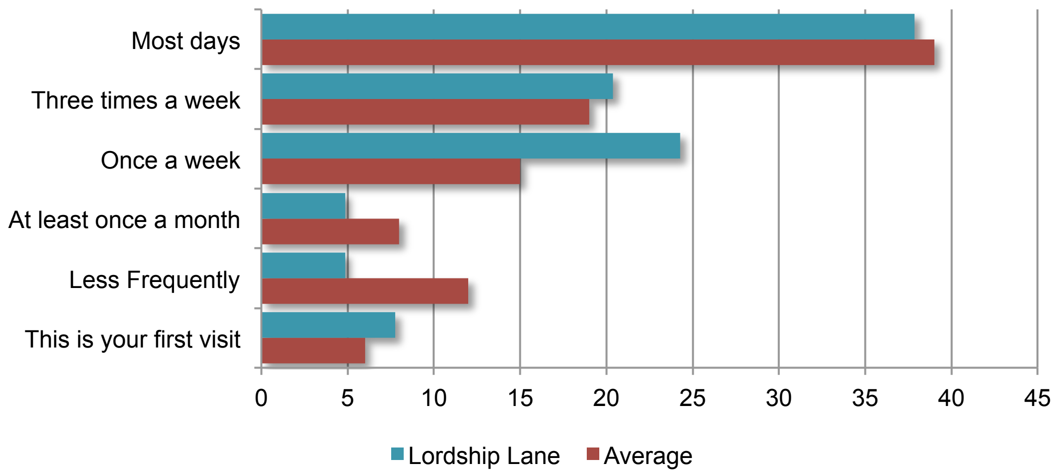
6. Consumer Behaviour

6.1 Frequency and Dwell Time

The survey established the frequency with which visitors came to Lordship Lane and how long they stayed. These values were compared with the total responses to identify some characteristic features of visitor behaviour on the high street. Figure 4 reveals that frequent visits are the norm, but that daily trips are a little below average. Weekly and tri-weekly trips are higher than expected, although over a third do visit daily. To make sense of these numbers it is also important to ascertain the duration of the visits.

Figure 4: Frequency of Visit

"How often do you visit this high street?"



Respondents were asked how long they intended to stay on the high street, and Table 12 indicates that visits to Lordship Lane are most likely to be a little longer than average. While around the average expected to spend about thirty minutes, those staying for up to an hour were far beyond the Southwark norm (21% versus 30% on Lordship Lane). A further sizeable proportion (13%) intended to stay for up to four hours.

These values still highlight a contrast with average dwell times recorded at Westfield White City, where visitors spend two hours thirty-five minutes on an average trip[1] but dwell times on Lordship Lane are amongst the highest in the borough, probably because of the nature of the shopping and the variety and scope of the retail offer.

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[1] Data source: http://www.exterionmedia.com/uk/what-we-do/our-media/retail-advertising

Table 12: Dwell Time

"How long have you spent or do you intend to spend here today?"

	Average	Lordship Lane
Up to 15 minutes	22	12
15 – 30 minutes	26	28
30 minutes – 1 hour	21	30
1 – 2 hours	17	15
2 – 3 hours	4	2
3 – 4 hours	2	1
More than 4 hours	8	13

A longer than average dwell time

6.2 Intended Purpose of visit

Respondents were asked to name "the main purpose of your visit here today". 57% said they were shopping, 24% passing through, 10% eating, drinking or meeting friends, and 4% intended to visit a bank, building society or other professional service.

Since most high street visits are unlikely to be for a single purpose, respondents were then also asked what else they would be doing. On that basis the combined scores in Table 13 probably give a more accurate representation of the intended purpose of the visit and the use of the services on offer.

On that trip nearly three quarters said they would be shopping. In addition, over half intended to visit a restaurant, café, pub or takeaway, or to meet friends, and almost a fifth to use financial and other services. All these scores are about average although the strongly stated *primary* purpose of shopping is an indication of consumer motivation here.

Shopping is therefore more important as a primary driver of footfall, since although the foodservice offer including cafes, takeaways, restaurants and coffee shops and is well served, it scored at only half the expected rate as a primary purpose and reached the category average in aggregate.

Table 13: Main & Secondary Intended Purpose.

What is the main purpose of your visit to this town centre today?

Apart from […..], what else will you be doing here today?

Purpose of Visit Main & Secondary	Average %	Lordship Lane %
Shopping	45	57
	30	15
	75	***72***
Travelling through	23	*24*
	23	25
	46	***50***
Eating, Drinking, Leisure	18	10
	35	47
	53	***57***
Fitnesss, Health, Finance	6	*4*
	8	13
	14	***17***
Other	8	5
	4	0
	12	***5***

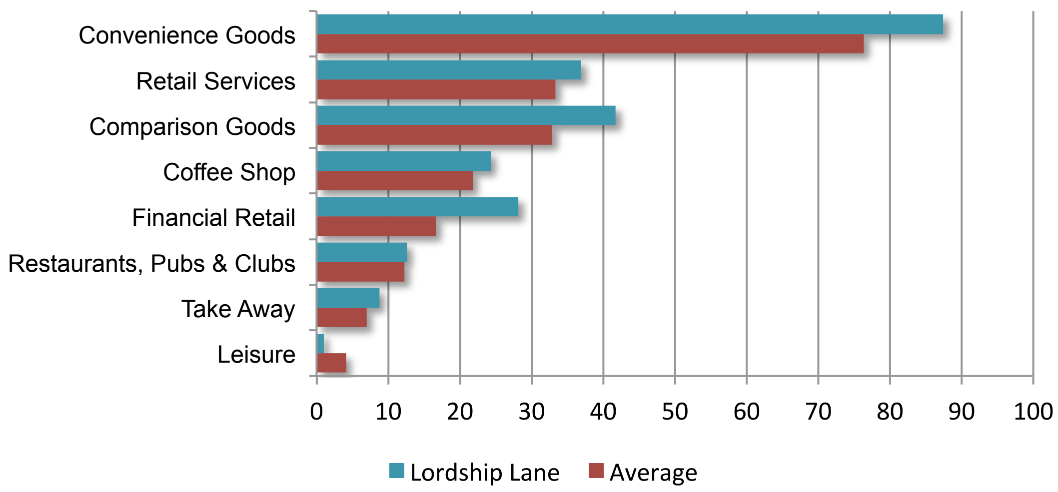
Nearly **three quarters are shopping today.**

6.3 Which of these have you visited or shopped in today?

In Figure 5, responses reflect the actual behaviour rather than the intention expressed in the earlier results.

Here it can be seen that higher than average proportion visited a convenience store, but also greater than average proportions visited comparison goods shops, as well as services (including dry cleaning, hair dressing and shoe repairs) and banks & post office. The visitors to foodservice outlets were closer to the norm, with the exception of coffee shops.

Figure 5: What have you visited or spent money on today?



6.4 Claimed Average Spend

Table 14 indicates that the average intended or claimed spend is higher than average as might be expected, with almost a quarter expecting to part with between £30 and £40 around 50% above average. Those claiming to be spending over £70 though few are also at twice the proportion found elsewhere.

Table 14: Claimed Average Spend

By the time you leave this town centre today how much do you expect to spend?

	Average	Lordship Lane
	%	%
Less than £10	32	22
£10 - £20	29	29
£20 - £30	16	15
£30 - £40	10	12
£40 - £50	7	12
£50 - £70	4	3
More than £70	3	6

Average Spend is higher than average

In addition, the average spend across all eight high streets shows that one third of all Southwark shoppers intend to spend less than £10 per visit on any high street. On this basis too, Lordship Lane does better, with somewhat fewer visitors in this category.

This indicates that even in the convenience stores the local shopper on Lordship Lane is a bigger spender than average.

6.5 Where else do you go shopping?

Footfall density on any high street is a matter of competition, since consumers can choose from a wide variety of locations within and beyond the borough for a number of purposes. The study has identified that dwell times and spends are higher than average on a number of Southwark high streets but visit frequencies are lower, because they are destination locations, perhaps for a market or for a range of comparison goods retailers. Lordship Lane is one such destination, where the retail mix is rather broader and may well be drawing visitors from a little further afield.

Table 15: Duplication of High Streets

"In which other town centres do you shop regularly?"

(n = 103)	Lordship Lane	%
Peckham	24	23
West End	15	15
Lewisham	11	11
Brixton	9	9
Bromley	4	4
Croydon	3	3
New Cross	3	3
Herne Hill	2	2
Surrey Quays	2	2
Westfield Stratford	2	2
		73
21 alternatives		

Where else do they shop? Table 15 indicates the most popular high streets with Lordship Lane's shoppers, the locations it competes with the hardest for footfall. The top four locations account for 58% of the named destinations, and three of these are local: the most popular choice by far is Peckham, while the West End comes second. All are destinations for comparison shopping, offering wider retail choice, often from big brand name retailers. After the top four locations named, the number of respondents identifying any location declines rapidly.

The total list of competing alternatives is long, reaching 21, and yet almost half the switching is accounted for in just four choices. This is a familiar pattern in retail gravitation models where the busiest locations with the easiest access are the biggest competitors. Most Lordship Lane shoppers can also be found in the West End, Brixton, Peckham and Stratford Westfield. This is hardly surprising, but it means that Lordship Lane needs to compete on that basis. The shoppers are there because it is convenient and fits into their routine, but while it offers much of what is available elsewhere, the offer is limited in comparison with say Peckham or Oxford Street, and so attention must be drawn to the distinctive features and advantages of going local.

6.6 Consumer Behaviour: summary

Lordship Lane is a busy local high street, with strong trade at the weekend. Visitors are very likely to be of above average income, to live and/or work locally and to arrive in the mid to late mornings or at lunchtime. They visit frequently, and shop both in convenience and comparison stores as well as for snacks and coffees, and for banking visits. Most intend to spend some money on the trip, even if they are just passing through and probably somewhere between £20 and £40, above the survey average. Lordship Lane is competing with larger and busier destination centres including the West End and Brixton, which are easily accessible.

7. Attitudes to the High Street

Consumer behaviour may be shaped by attitudes and so the survey investigated how high street visitors judged the experience on Lordship Lane. In Table 16 the attributes which most attract the visitors are identified. The table is ordered by the average Southwark results, and it can be seen that the high street scores below average on convenience, but rather higher on the range of stores on offer. The existence of a particular service is not however a draw for anyone, although 5% (more than twice the average) noted the ease of parking.

Table 16: What's good….?

What most attracts you to this town centre?

	Average	Lordship Lane
	%	%
Proximity or Convenience	**47**	38
Range of shops	**21**	34
Range of places to eat or drink	**10**	11
Attractive environment	**7**	7
A specific retailer or service	**4**	0
Ease of Parking	**2**	5
Other	**10**	6

One part of the population is satisfied with the choice of retail options…

The fact that the variety of stores is rated more positively (and by quite a margin) than the convenience indicates that this is drawing shoppers strongly, which is a phenomenon not noted in many other Southwark high streets which seem to be visited "because it's there".

When asked specifically what they thought might be improved or what they felt was missing, the biggest gripe by far (37%), as reported in Table 19, was however ***the lack of choice in stores*** and so a further section of the population are dissatisfied with the offer, a possible concern since it may lead to erosion of footfall. The next largest (just 5%) subjects were comments about parking and the cinema.

Table 17: What's bad…..?

What if anything do you think is missing from this town centre?

	Lordship Lane	
Respondents	*103*	
A Wider Range of Stores	38	37%
Parking	5	5%
Cinema	4	4%
Variety of Restaurants	3	3%
Police Station	2	2%
Leisure Activities	1	1%
Bars & Pubs	1	1%
Social & Community	1	1%
Bank/ATM	0	0%
Cafes	0	0%
Transportation & Public Realm	0	0%
Parks & Green Space	0	0%
Gyms	0	0%

… but an equal number would like to see an even wider selection of stores

8. Marketing Effectiveness

What can local businesses do to reach their target market either individually or as a community? In the final section of the shopper survey we asked respondents about their awareness of various advertising channels and messages, about their community engagement, and about their use of marketing promotions including coupons and digital mechanics.

8.1 Media Reach

The survey asked respondents to name their main source of local news as an open-ended question in order to test unprompted media awareness. Table 18 is ordered by the responses in Lordship Lane and compares these with the survey averages. The strong response for TV is probably unhelpful, apart from emphasising its reach for mainstream advertisers, but the table provides some useful insights.

The first is the continuing strength of local press: 42% of respondents claim to use one or other of the main local papers for information, with the South London Press reaching a quarter of respondents. Although online is fairly effective at 14% its reach by channel is fragmented and covers various social media including twitter and Facebook as well as the local community websites.

Table 18: Local Media Reach

Where do you mainly get your local news from?

	Average %	Lordship Lane %
TV	32	36
South London Press	7	24
Other Online	15	14
Word of Mouth	15	13
Southwark News	7	9
Other (Traditional)	8	5
Radio	8	5
S.E.1 Magazine	2	3
Southwark Life Magazine	1	1
Southwark Business Today	0	0
Southwark & Bermondsey News	2	0

The South London Press is widely read

The Southwark News has a slightly higher than expected reach, but otherwise there are few surprises against the survey averages. Considering that the duplication of destination is mainly with other South London high streets, and the size of the catchment, the reach of the South London Press across the borough suggests that it might be one useful vehicle to drive footfall onto Lordship Lane.

8.2 Advertising Recall

Unprompted recall of advertising for local events was then tested. Scores were low: about 12% could recall such advertising, and were then prompted to describe it. Table 19 lists the various responses, which are also then individually very low. The named events and their advertising may have been separated in time by a few months and memories decay, but the list still reflects a diverse mix of individual business activities and community driven events, and not just on Lordship Lane.

In some ways this also describes the population on any high street: they are there for very wide ranging reasons, they visit other high streets, but they are all likely to spend some money in passing through Lordship Lane, either on commercial or community events.

Table 19: Local Advertising Recall

"Have you seen any advertising for local events recently?" Which events?"

(n = 103)	Lordship Lane %
Yes	12
When Prompted:	
Goose Green Event	2
Bussey Building Peckham Rye	1
Football Club and museum	1
Golf	1
Kids Events	1
Restaurant promotion	1

Very low recall for local events

8.3 Community Engagement

When asked to recall any community or local events that they had attended in the past year, the response was slightly higher: just 28%. Some recalled events were outside Lordship Lane. The list does therefore indicate engagement with both community and commercial activities across and beyond Southwark and the adoption of local events by the population.

Table 20: Community Engagement

"Which local events have you attended in the past year?"

(n = 103)	Lordship Lane (count)
Goose green fair	12
Christmas Cracker	3
Kids Event	3
East Dulwich Farmers Market	2
Book launch	1
Brixton Splash	1
Church Fair	1
Dulwich Festival	1
Dulwich Golf Event	1
Fireworks	1
Lambeth Show	1
Library	1
Museum and comedy	1
Peckham Rye meeting	1
Street Party	1
Total	31
(Non-response = 72%)	

8.4 Promotional Reach

Finally Table 21 indicates an extremely low engagement with promotional marketing tools either online or traditional. The table is ordered by the scores for Lordship Lane, and shows that those shoppers are half as likely as shoppers elsewhere to take advantage of promotional mechanics: 8% used a coupon, just on the Southwark average, and 5% used an email promotion on the day. Otherwise the adoption of other devices was very low or negligible.

Table 21: Promotional Reach

Have you used any of the following today?

	Average %	Lordship Lane %
Coupons	7	8
Email Promotion	6	5
Store Locator	4	2
Social media promotion	7	1
Service Locator apps	4	1
Voucher apps	3	0
QR Codes	2	0
Total	32	17

A low uptake of promotions and offers

9. Conclusion

The data collected on Lordship Lane lead us to conclude the following:

- **Footfall density is moderate but far busier on Saturday.** On average *800 people per hour* pass up or down Lordship Lane, levels comparable with Walworth Road, and rather more than Herne Hill. Peak flows occurred between on Saturday morning and Tuesday lunchtime, and shoppers came by bus and car as well as on foot.

- **Local customers, shopping little & often.** The biggest advantage for businesses on Lordship Lane is the convenience of the location for a large catchment of relatively affluent local shoppers. The street also draws people from a wider than average area. However, while frequency of visit is high and average spend a little above average, a third of the visitors are rather unenthusiastic about what is on offer, while another third are there because of the range of shops. Lordship Lane serves shoppers in many retail categories but underperforms on foodservice.

- **Relationship building.** The nature of the customer base creates an opportunity for independent businesses to stand out by building personal relationships with frequent and regular shoppers. The centre is competing with larger and more attractive retail destinations with speciality and branded stores however, and so these relationships must be strong and businesses must respond. The relationships might be service-based, founded on the understanding that consumers are likely to be in a hurry; or product based, matching the offer more closely to the needs and wants of the affluent top-up shopper. Independent store-owners are in a powerful competitive position here and can research their customer base quickly and react to its needs easily. The branded offers must respond within the framework of the brand.

- **Be distinctive.** The idea is to become a stand-out, distinctive in meeting the needs of customers and conscious that many shoppers can and do switch destinations easily. Value can be created through service as well as through price, and independent businesses can and often do provide better service where price is hard to match.

- **Be local.** The customer base is predominantly local so there is a competitive opportunity for independent retailers to be in and of the community, offering convenience for comparison goods shoppers. Supporting local business networks to drive quality and service and instigate local activities creates talking points to engage with local shoppers and encourages further word of mouth. As a business group, this may encourage footfall through advertised events in the local press, which has good reach.