Southwark Council

Southwark high streets: **Nunhead Lane**

www.southwark.gov.uk

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September 2015

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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 Nunhead Lane.

1.1 Summary of Findings

The Retail Mix: Nunhead Lane offers a fairly comprehensive retail mix but is limited in foodservice options and in its scope: the centre has about half the number of outlets seen in other Southwark locations.

The People on Nunhead Lane: The available consumers are a little older than the average for the borough, slightly more likely to be married or cohabiting, and just a little less likely to have children. They are for the most part more affluent in professional or managerial occupations, and they live and/or work extremely locally.

Footfall Densities: The footfalls on Nunhead Lane are the lowest observed in this study and on average they reach just 200 people per hour. Saturday and Tuesday are similar in reflecting a lunchtime peak, which is less extreme on Tuesday, and Saturday is about 1.3 times busier than Tuesday.

Consumer Behaviour: The visitors to Nunhead Lane come frequently – every other day – but they spend a shorter amount of time and money than the average, mostly between £10 and £20. However, all spend something, whatever other reason they have for being there.

Attitude & Usage: The main motivation for being on the high street is convenience: few visit to patronise a specific business, but the main comment is that the choice of shops is attractive. Unlike other local high streets, visitors here seem to be satisfied with what is on offer. This creates a useful context to market any specific existing business since attitudes are largely favourable and therefore an investment in becoming distinctive would surely pay off. For the area as a whole there is a strong community feeling identified, and 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 high awareness of local advertising and of local events, 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 2% of respondents said they would respond to a promotion on the day.

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 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 2, but at the granular level, the diversity of offer observed can be summarised as the ratio of those represented out of the total of 26 categories defined.

Table 1: Retail mix comparison; Nunhead Lane

	Nunhead Lane	Average
Number of Stores:	**25**	**80**
	%	**%**
Foodservice *Restaurants, Cafes, Coffee Shops*	**24**	25
Financial Services *Banks, Building Societies, Post Office, Loan Shops*	**4**	11
Mixed Non-Food Retail *Clothing, Shoes Accessories, DIY, Toys*	**36**	25
Personal Care *Hairdressing, Beauty/Tanning shops, Doctors*	**4**	13
Technology *Phone Shops, PC repairs, Electricals*	**0**	4
Entertainment *Betting Shops, Libraries*	**4**	4
Grocery *Multiple & specialist independent retail*	**28**	17
		100

A small number of shops, but a fair representation of the categories

Table 1 compares the number and types of stores identified on Nunhead Lane with the distribution seen across all the high streets in the study. In total 25 different businesses were counted on both sides of the retail centre. This is below the average of the eight centres studied – Nunhead Lane is a small and local high street. Of the 26 categories in the analysis just 16 were represented, giving a diversity index of 0.62, suggesting the limited range of goods and services on offer.

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

- Professional or Financial Services
- Personal Care
- Technology

The mix on Nunhead Lane is skewed away from services but scores somewhat higher on grocery (including specialist food outlets) foodservice, and in non-food retail. The variety of offers in each category is limited by the total size of the high street. The provision of restaurants, takeaways and coffee shops is above average, and there is also a medium sized convenience store. Few transport links pass through, in comparison with other high streets in the study.

3. Respondent Demographics

The students interviewed 88 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 = 88	Average %	Nunhead Lane %
18 – 24	18	7
25 – 34	30	17
35 - 44	23	34
45 – 54	15	17
55 – 64	7	14
65 – 74	5	7
75 or older	2	5
Male	47	44
Female	53	56

An older than average visitor to the High Street

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 Nunhead Lane. Here the population appears to be older than average on Southwark's high streets, with a distribution skewed upwards of 35.

Table 3: Ethnicity Overview

	Average %	Southwark %	Nunhead Lane %
White	61	54	86
Black	19	26	5
Asian	8	10	2
Mixed	9	6	7
Other	1	3	0

Predominantly white ethnicity

In terms of ethnicity, Table 3 compares the respondents in Nunhead Lane with the survey averages and with Southwark population data. The visitors on Nunhead Lane were very much more likely than average in Southwark or in this survey to fall into broadly white categories. In terms of education, the sample was slightly less educated than the average for the borough, with slightly more than average respondents having left education after compulsory schooling.

Table 4: Education

	Average %	Nunhead Lane %
Compulsory Education at School	14	17
Vocational or College or 6th Form	31	32
University	55	51

Table 5 shows that about a quarter, the borough average are not currently working, while about half are in professional or managerial occupations, above average in the survey.

Table 5: Occupation

	Average %	Nunhead Lane %
Professional occupations	20	**30**
Not currently working	23	**25**
Managers, directors and senior officials	10	**19**
Administrative and secretarial occupations	8	**10**
Caring, leisure and other service occupations	10	**5**
Sales and customer service occupations	17	**5**
Skilled trades occupations	6	**2**
Elementary occupations	2	**2**
Associate professional and technical occupations	4	**1**
Process, plant and machine operatives	2	**1**

25% not in work, but 50% in managerial or professional roles.

The household structure here is also rather different from elsewhere: two thirds of respondents are married or living with a partner, about 50% ahead of the Southwark average. Households are more likely to have two adults, but the number of children is slightly lower than expected

Table 6: Household Structure

	Average %	Nunhead Lane %
Single	41	**23**
Married	35	**50**
Civil Partnership	2	**2**
Living with partner	12	**15**
Divorced	4	**3**
Widowed	2	**2**
Separated	2	**2**
Number of Adults in the home:		
1	28	**24**
2	51	**67**
3	13	**5**
4 +	7	**5**
Number of 13-17s in the home:		
0	81	**84**
1	12	**10**
2 +	7	**6**
Children under 13:		
0	78	**81**
1	13	**11**
2	7	**5**
3 +	2	**3**

Finally, Table 7 describes the ways in which the survey respondents occupy their homes: a third are in rented accommodation, but the occupancy data is firmly skewed towards ownership, and the number of home owners is 40% above the borough average..

Table 7: Household Occupancy

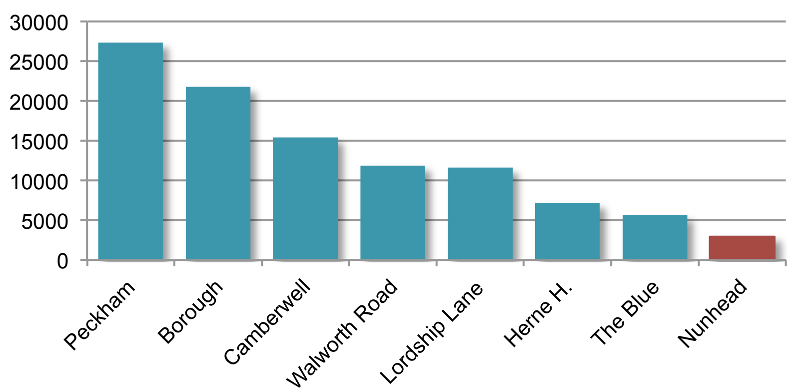
	Average %	Nunhead Lane %
Rent	52	35
Own it outright or with a mortgage	31	54
Shared ownership or Housing Association	6	2
Live there rent free	5	2
Other/ No response	7	6

Very high home ownership

4 . Footfall Distributions

Nunhead Lane is the quietest high streets observed. Over the course of two days under 3,000 pedestrians were counted passing on either side of the street. This amounts to an average footfall density of 200 people per hour, ten times fewer than the number observed at Peckham Rye. Figure 1 compares the footfall at Nunhead Lane with the eight high streets in the study.

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



4.1 Weekend & Weekday Ratio

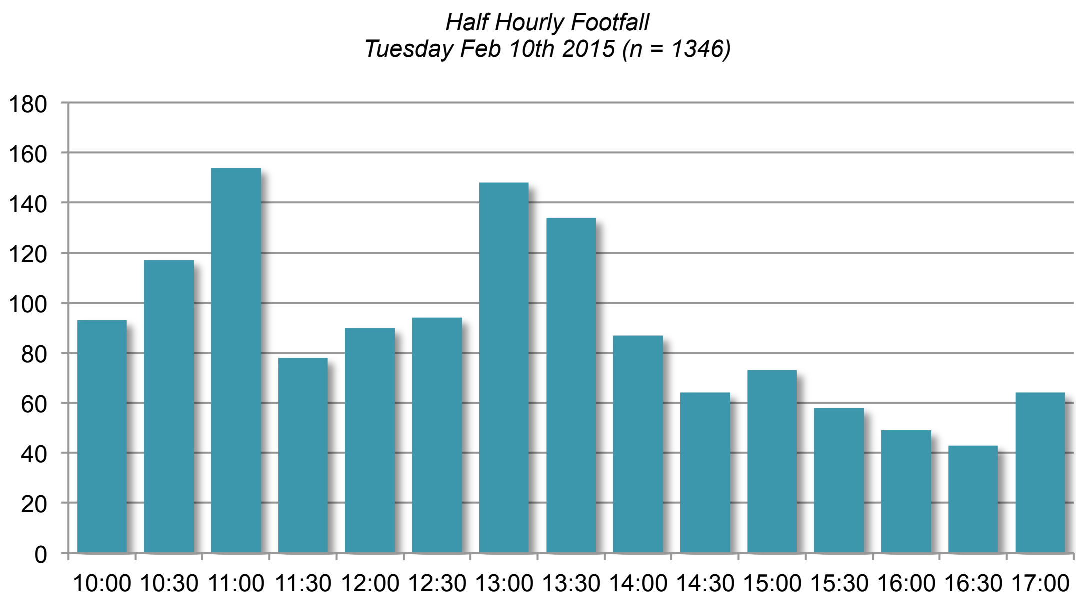
Table 8 highlights the density ratio between Saturday and Tuesday. In Nunhead, unlike some other centres in Southwark, there was a footfall uplift, so that Saturday was about 1.3 times as busy as Tuesday.

Table 8: Comparative footfall by day: February 2015

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

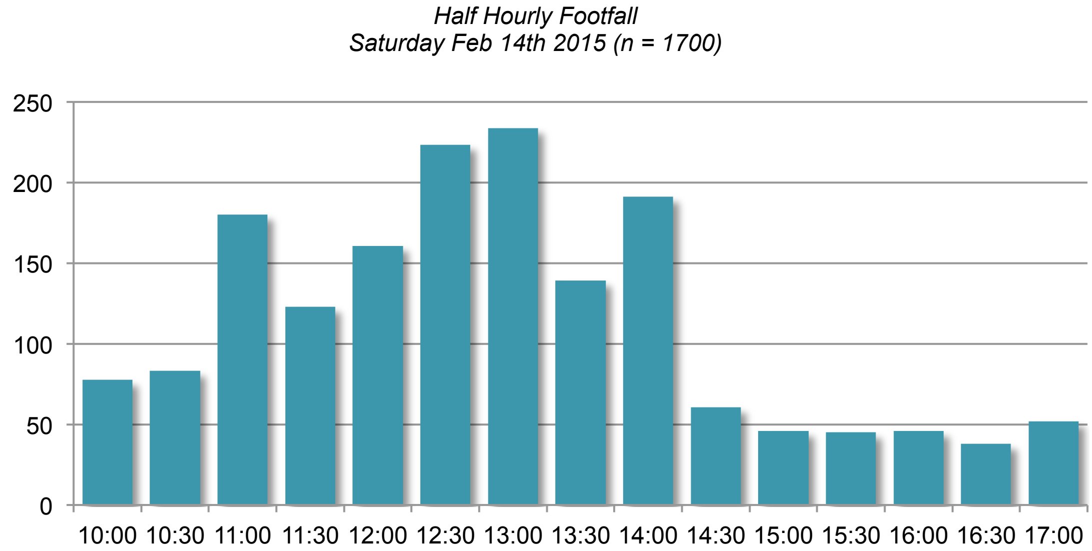
	Tuesday	Saturday	Total	Average Hour
Peckham (Rye Lane)	10778	16599	27377	1900
Borough High Street	11569	10204	21773	1600
Camberwell	**7759**	**7637**	**15396**	**1100**
Walworth Road	5527	6369	11896	850
Lordship Lane	2954	8645	11599	830
Herne Hill	2851	4330	7181	500
The Blue	2677	2945	5622	400
Nunhead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

4.2 Footfall Count: Tuesday



Tuesday footfall peaked at almost twice the initial density at 11.00, before returning to the earlier level, peaked again at lunchtime then settled for the remainder of the observation period.

4.3 Footfall Count: Saturday



Similar peaks were observed on Saturday, but the traffic built up rather more dramatically from a slow start, and the afternoon dropped away slightly later, from 14.30. to a low and consistent level. These patterns indicate a lunchtime trade across the week, and suggest a *"make hay while the sun shines"* strategy, indicating that retailers be well prepared to meet the needs of the available traffic in a concentrated period across the middle of the day. The peak is slightly longer on Saturdays.

5. High Street Catchment Area, Travel Time & Method

The interviewers collected data on home postcodes, travel time and mode of transport. Table 9 is ordered by size, and shows that almost all of the respondents (86%) lived in the local postcode, SE15. The second highest area, SE14 is adjacent and drew another 10% of the sample. The remainder lived in three further postcodes, mostly around South 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

Nunhead Lane	
	%
SE15	86
SE14	10
GU8	1
SE23	1
SE4	1

5.1 How local?

Being "local" is an important perception in relation to the most frequent choice of high street destination. Table 10 shows that 98% of the visitors interviewed on Nunhead Lane considered themselves to be local by virtue of where they lived or worked. The proportion claiming to live locally is 32 points above the average – this is an extremely local high street - and travel time for most (93%) was under 30 minutes.

Table 10: How Local?

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

(n = 88)	Average %	Nunhead Lane %
Living Locally	52	84
Working Locally	14	9
Both	17	5
Those who travelled...		
Less than 30 minutes	74	93
Between half & one hour	22	5
1 to 2 hours	3	1
Over 2 hours	1	1

Visitors to Nunhead Lane are most likely *to live nearby*.

5.2 How did they get there?

The proportion of respondents who had walked to Nunhead Lane is well above the average for the entire survey, and since the high street is not a major transport interchange it is hardly surprising that only 6% came by bus. A further 12% came by car or bike. The picture is one of an extremely local population using the centre because it is very convenient and easy to access either from home or work.

Table 11: Transport

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

(n = 88)	Average %	Nunhead Lane %
Walk	48	**80**
Car	11	**9**
Bus	22	**6**
Cycle	6	**3**
Train	6	**2**
Tube	5	**0**
Taxi	1	**0**
Other	0	**0**

- almost everybody arrives ***on foot***

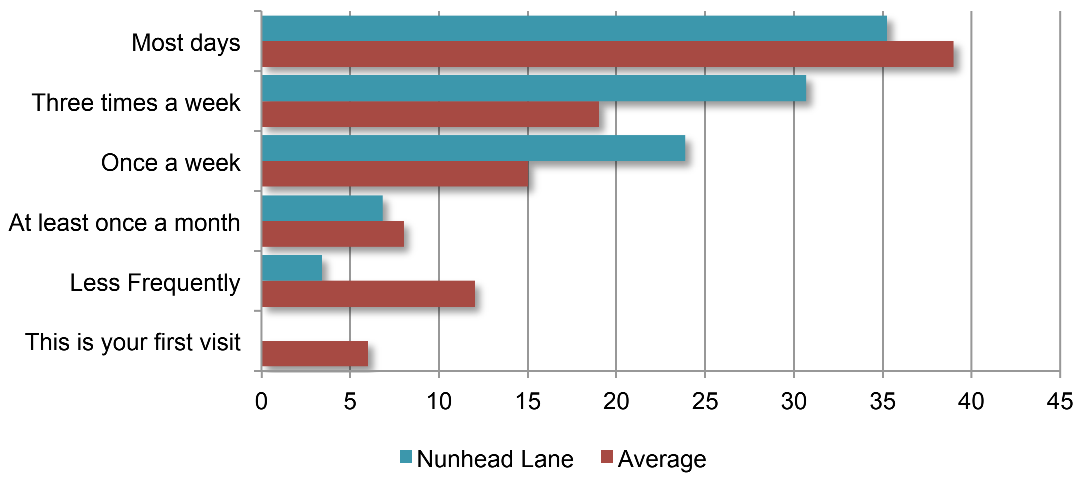
6. Consumer Behaviour

6.1 Frequency and Dwell Time

The survey established the frequency with which visitors came to Nunhead Lane and how long they stayed. These values were compared with the total responses to identify some characteristic features of visitor behaviour. Figure 4 reveals that frequency of visit is above average, with very many visiting every other day or at least once a week. The pattern is rather less than daily, but most people appear top pass through at least several times in a week. To make sense of these numbers it is also important to ascertain the duration of these visits.

Figure 4: Frequency of Visit

"How often do you visit this high street?"



A third visit ***every day***

Respondents were asked how long they intended to stay on the high street, and Table 12 indicates that visits to Nunhead Lane are most likely to be short. Nearly 80% of respondents intended to be there for half an hour or less but in comparison with other High Streets in the survey this is not unusual, and given the limited scope of the centre.

Visit frequency rather than dwell time thus appears to be a useful distinctive feature of shopping in Nunhead Lane, with visitors coming often but staying only briefly.

Table 12: Dwell Time

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

(n = 88)	Average	Nunhead Lane
Up to 15 minutes	22	41
15 – 30 minutes	26	38
30 minutes – 1 hour	21	14
1 – 2 hours	17	2
2 – 3 hours	4	1
3 – 4 hours	2	0
More than 4 hours	8	5

80% spend *half an hour or less*.

6.2 Intended Purpose of visit

Respondents were asked to name "the main purpose of your visit here today". 76% said they were shopping, 13% passing through, 6% eating, drinking or meeting friends, and 2% intended to visit a bank, building society or other professional service.

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 %	Nunhead Lane %
Shopping	45	76
	30	44
	75	***100***
Travelling through	23	*13*
	23	27
	46	***39***
Eating, Drinking, Leisure	18	6
	35	29
	53	***35***
Fitnesss, Health, Finance	6	*2*
	8	0
	14	***2***
Other	8	3
	4	0
	12	***3***

***All* are shopping today.**

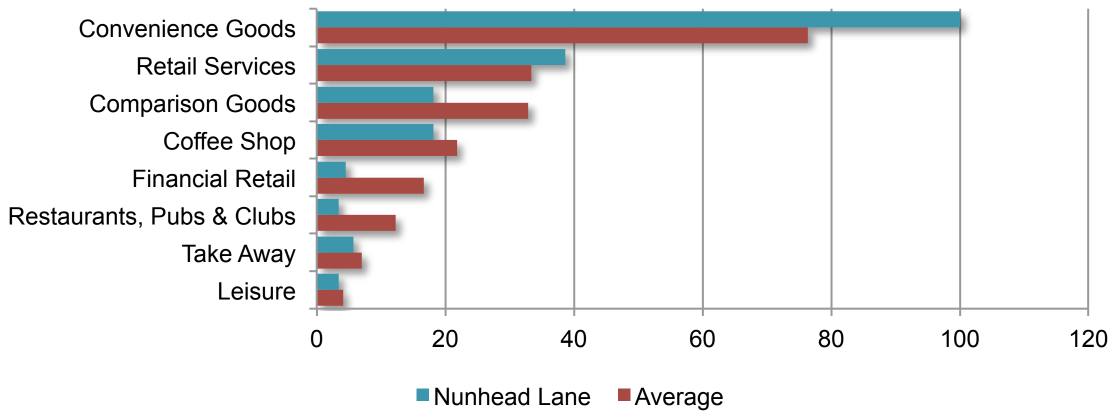
Since most high street visits are unlikely to be for a single purpose, respondents were then also asked what else they would be doing. On that basis the combined scores in Table 13 probably give a more accurate representation of the intended purpose of the visit and the use of the services on offer.

All said they would be shopping. In addition, one third intended to visit a restaurant, café, pub or takeaway, or to meet friends, and just 2% to use financial and other services. The first is far above survey average and may represent an opportunity for local businesses to meet local demand better and more profitably. But scores for eating, leisure and other activities are all below par, and this is the result of the limited offer no doubt.

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

In addition to the intention questions reported in Table 15, respondents were asked to state where they had visited or spent money, and the responses are shown in Figure 5.

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



The figure shows that every respondent had visited a convenience store, and over a third had visited a retail service (dry cleaner, hair dresser etc). These responses are above average, while the remainder score rather lower against the Southwark benchmark. Fewer than expected visited a coffee shop or take away for example.

6.4 Claimed Average Spend

The nature of the shopping on Nunhead Lane is best defined as little and often. Table 14 indicates that the average intended or claimed spend is low, with almost two thirds expecting to part with less than £20.00. A further 22% intended to spend between £20 and £30. The distribution of higher spending bands is lower than elsewhere in the borough, and may simply reflect the offer available.

Table 14. Claimed Average Spend
By the time you leave this town centre today how much do you expect to spend?

(n = 88)	Average	Nunhead Lane
	%	%
Less than £10	32	31
£10 - £20	29	35
£20 - £30	16	22
£30 - £40	10	5
£40 - £50	7	6
£50 - £70	4	0
More than £70	3	1

Average Spend is low

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. Nunhead Lane however appears to draw most of its visitors not for comparison goods shopping but mostly for convenience top-up purchases.

Table 15: Duplication of High Streets
"In which other town centres do you shop regularly?"

(n = 88)	Nunhead Lane	%
Peckham	37	42
East Dulwich	7	8
West End	6	7
Sainsbury's	5	6
Blue Water	3	3
Bellenden Road	2	2
Elephant and Castle	2	2
Lewisham	2	2
Lordship Lane	2	2
Surrey Quays	2	2
		77
18 alternatives		

Table 15 indicates the biggest high streets with which Nunhead Lane is competing for footfall. The top two locations named attract 50% of the respondents, and Peckham is by far and away the most important. It is also the most local source of comparison goods. After the top two locations named, the number of respondents identifying any location declines rapidly and the West End is low down the list of destinations at 7%.

The total list of competing alternatives is long, reaching 18, yet almost half the switching is accounted for in just two choices. This is a familiar pattern in retail gravitation models where the busiest locations with the easiest access are the biggest competitors. Most Nunhead shoppers can also be found in Peckham and this is hardly surprising, but it doesn't necessarily mean that Nunhead should try to compete on that basis. Its shoppers on are there because it is convenient and fits into their routine, and this in itself this creates a sizable opportunity for local retailers.

6.6 Consumer Behaviour: summary

Nunhead is a quiet but local retail centre, with the lowest footfall density in the survey. Visitors are very likely to live and/or work locally and to arrive at lunchtime The centre is a convenient walk or short bus ride away, and so people visit very frequently, for convenience goods, snacks and groceries, or dry cleaning, hairdressing and shoe repairs. Everyone who visits intends to spend some money on the trip, even if they are just passing through and probably somewhere between £10 and £20, which is low but near the survey average. Such “little & often” shopping becomes habitual and creates opportunities for independent retailers which we identify in the conclusion.

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 Nunhead 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 Nunhead scores very strongly on the range of shops, which is obviously a key motivating factor. The highest scoring attribute (but still average for the survey) is convenience. After that the features all score slightly lower than the average – environment, foodservice, ease of parking… but the scores are close to the average.

The scores indicate that the shoppers are attracted to the centre by the range of shops (although not by the catering options) and that by and large they are satisfied with the offer, unlike the respondents in some other locations where these scores were lower than average.

Table 16: What's good….?
What most attracts you to this town centre?

(n = 88)	Average	Nunhead Lane
	%	%
Proximity or Convenience	**47**	47
Range of shops	**21**	36
Range of places to eat or drink	**10**	6
Attractive environment	**7**	1
A specific retailer or service	**4**	5
Ease of Parking	**2**	1
Other	**10**	5

When asked specifically what they thought might be improved or what they felt was missing, the biggest gripe by far, as reported in Table 17, was the lack of an ATM and little available choice in foodservice. Otherwise scores were very close to average, and low.

The list of missing attributes was developed from open-ended questions across the full survey so it can be seen that Nunhead does suffer from the full range by any means. Few complained about parking and only nobody missed a sense of community.

Table 17: What's bad…..?
What if anything do you think is missing from this town centre?

(n = 88)	Nunhead Lane	
Respondents	***88***	
Bank/ATM	**39**	44%
Variety of Restaurants	**15**	17%
A Wider Range of Stores	**9**	10%
Transportation & Public Realm	**4**	5%
Cafes	**2**	2%
Leisure Activities	**1**	1%
Parking	**1**	1%
Gyms	**1**	1%
Bars & Pubs	**0**	0%
Cinema	**0**	0%
Parks & Green Space	**0**	0%
Social & Community	**0**	0%
Police Station	**0**	0%

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 Nunhead and compares these with the survey averages. The 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: over 56% of respondents claim to use one or other of the main local papers for information. Although online is fairly effective at 15% its reach by channel is fragmented, covering various social media including twitter and Facebook as well as local community websites. By far the broadest reach is through the South London Press, and local radio also appears to have potential.

Table 18: Local Media Reach

Where do you mainly get your local news from?

(n = 88)	Average %	Nunhead Lane %
South London Press	7	32
Radio	8	18
TV	32	16
Other Online	15	15
Other (Traditional)	8	9
Southwark Life Magazine	1	7
Word of Mouth	15	6
Southwark News	7	5
Southwark Business Today	0	2
Southwark & Bermondsey News	2	1
S.E.1 Magazine	2	0

56% read traditional print media

Word of Mouth was named by fewer than expected respondents as an information source: it is possible that WoM or *e*-WoM are hardly considered as sources of information in a context in which Nunhead Lane is shopped *“because it’s there”,* but for which there are low expectations.

For a business that stands out and becomes distinctive by surprising or delighting regular shoppers with some exceptional attribute, word of mouth could be easily generated.

8.2 Advertising Recall

Unprompted recall of advertising for local events was then tested. Scores were relatively high: about 37% could recall such advertising, and were then prompted to describe it. Table 19 lists the various responses, which are also then individually quite 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.

Table 19: Local Advertising Recall

“Have you seen any advertising for local events recently?” Which events?”

(n = 88)	Nunhead Lane %
Yes	37
When Prompted:	
Film Festival	9
Food festival	8
Art Walk	7
Green opening area	6
Nunhead Green film festival	2
Cemetery	2
Art Exhibition	1
Saturday Market	1
Peckham peculiar	1
Charity Fair	1
Karaoke in the Pub	1
music(pub)	1
Peckham crafty forks	1
The Pelican	1

A good mix of local event advertisements recalled

8.3 Community Engagement

When asked to recall any community or local events they had attended in the past year, the response was also strong: almost half (42%).

The question generated a list of community rather than commercial events from the respondents. Several visitors were able to recall food festival and likewise an art walk. The list indicates a strong engagement with community and some commercial activities, and the adoption of local events by the population.

Table 20: Community Engagement
"Which local events have you attended in the past year?"

(n = 88)	**Nunhead Lane (Count)**
Food Festival	10
Art Walk	9
Green area opening	5
Cemetery Open Day	3
Peckham Rye Mixed Fest	3
Fireworks	2
Nunhead Green film festival	2
Salvation Army event	2
Boot Sales	1
Comedy Night	1
Event on the Green	1
Park Fairs	1
Peckham Market	1
Telegraph Hill festival	1
Total	42
(Non-response = 52%)	

A local community engaged with local community events

8.4 Promotional Reach

Finally and most surprisingly Table 21 indicates an extremely low engagement with promotional marketing tools either online or traditional. The table is ordered by the average scores for the borough, already low at 32%. Nunhead shoppers are even less likely than average to take advantage of these mechanics: just 2% used social media or an online app that day.

Table 21: Promotional Reach
Have you used any of the following today?

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

Little engagement with local marketing interventions

9. Conclusion

The data collected in Nunhead lead us to conclude the following:

- **Footfall density is low but constitutes a willing target market.** On average just *200 people per hour* pass up or down Nunhead Lane, the lowest in the survey. Peak flows occurred between 12 and 3 on Saturday and on Tuesday, and Saturday was 1.3 times busier than Tuesday. Everybody on the street had however spent money there.

- **Local customers, shopping little & often.** The biggest advantage for businesses in Nunhead is the convenience of the location for local and affluent shoppers. However, while frequency of visit is high, average spend and dwell time are a little below average, although visitors are not unenthusiastic about what is on offer.

- **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 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 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.

- **Be distinctive.** The idea is to become a stand-out, distinctive in meeting the need for convenience in every way – store layout, service provision, and offer. By drawing attention to this it becomes possible to generate word of mouth against a background of low expectations. Delivering consistently above those expectations must bring rewards.

- **Be local.** The customer base is predominantly local so there is a competitive opportunity for independent retailers to be in and of the community. 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 already be encouraging footfall through local events.