Southwark high streets: **Camberwell**

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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 Denmark Hill Camberwell.

1.1 Summary of Findings

The Retail Mix: The Denmark Hill retail mix is highly skewed away from comparison goods, but features convenience stores, banking and other services as well as take-away outlets and coffee shops. There is a mid-size supermarket behind the high street. Two thirds of respondents named a large comparison goods retail centre as their alternative shopping destination

The People on Denmark Hill: The available consumers are largely young, single and polarised between associate professional occupations and currently not working. For the most part they live locally in rented accommodation, or work locally, or both. They typically arrive on the high street by foot or on the bus, and spend a relatively short time there, eating drinking or conducting top-up shopping.

Footfall Densities: The footfalls on Denmark Hill are the third highest observed in this study and on average they reach 1100 people per hour. Saturday and Tuesday are similar in the amount of passing trade but the lunchtime peak, which is extreme on Tuesday, is slightly extended on Saturday and lasts until 3.00.

Consumer Behaviour: The visitors to Denmark Hill come frequently – every day or every other day. They spend a short amount of time but an above average sum of money on each occasion, mostly between £10 and £20. Most will 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, and the main comment is that the choice of shops is limited. This creates a useful context to market any specific existing business since expectations are low, and therefore an investment in becoming distinctive would surely pay off. 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 awareness of local advertising and 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.

Table 1: Retail mix comparison; Camberwell

	Camberwell %	Average %
Number of Stores:	**67**	**80**
Foodservice *Restaurants, Cafes, Coffee Shops*	**25**	25
Financial Services *Banks, Building Societies, Post Office, Loan Shops*	**22**	11
Comparison Goods *Clothing, Shoes Accessories, DIY, Toys*	**16**	25
Personal Care *Hairdressing, Beauty/Tanning shops, Doctors*	**16**	13
Technology *Phone Shops, PC repairs, Electricals*	**7**	4
Entertainment *Betting Shops, Libraries*	**7**	4
Grocery *Multiple & specialist independent retail*	**4**	17
Totals:	**100**	100

An ad hoc 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 which compares the number and types of stores identified on Denmark Hill with the distribution seen across all the high streets in the study. In total 67 different businesses were counted on both sides of the street in this section of Camberwell's retail centre. This is close to the average of the eight centres studied. Of the 26 categories in the analysis 21 were represented on Denmark Hill, giving a diversity index of 0.81.

The mix on Denmark Hill was observed to be highly skewed away from comparison goods and grocery retail, and scores rather higher on financial and other services including banks and loan shops, bookmakers and personal care. The provision of restaurants, takeaways and coffee shops is at the average, but there is a medium sized multiple grocer just behind the high street.

Denmark Hill is also a major transport interchange with a railway station and many bus routes passing through, and as a consequence it was the third busiest site in the study.

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

- Gyms
- A Library
- Specialist food retailers

It is however true to say of Camberwell that Denmark Hill is just one section of a retail centre established around at least four high streets: these missing offers may be better represented across this total area.

3. Respondent Demographics

The students interviewed 102 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

(Sample: n = 102)	Average %	Camberwell %
18 – 24	**18**	18
25 – 34	**30**	29
35 - 44	**23**	20
45 – 54	**15**	15
55 – 64	**7**	10
65 – 74	**5**	6
75 or older	**2**	2
Male	**47**	51
Female	**53**	49

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 Denmark Hill. Both results show a bias towards the younger groups, but slightly less pronounced in the Camberwell sample; as a result it is close to the Southwark population.

Table 3: Ethnicity Overview

(Sample: n = 102)	Average %	Southwark %	Camberwell
White	61	54	49
Black	19	26	29
Asian	8	10	8
Mixed	9	6	11
Other	1	3	3

Age and ethnicity of the sample is **largely representative** of the borough.

In terms of ethnicity, Table 3 compares the respondents in Camberwell with the survey averages and with Southwark population data. The visitors on Denmark Hill were somewhat less likely than average to fall into broadly white categories, and rather more likely to be of black or mixed ethnicity. The bias was not pronounced. In terms of education, the Camberwell sample was slightly better educated than the average for the borough, with a slight skew towards a university degree.

Table 4: Education

(Sample: n = 102)	Average %	Camberwell %
Compulsory Education at School	**14**	9
Vocational or College or 6th Form	**31**	33
University	**55**	58

An **educated** base of potential customers

Visitors to Camberwell showed a polarity in occupation (Table 5) with over a quarter not currently working, and rather higher than average proportions of professional, associate professional and skilled trades also present in the sample.

Table 5: Occupation

(Sample: n = 102)	Average %	Camberwell %
Not currently working	23	27
Professional occupations	20	23
Sales and customer service occupations	17	11
Associate professional and technical occupations	4	9
Skilled trades occupations	6	8
Administrative and secretarial occupations	8	7
Caring, leisure and other service occupations	10	7
Managers, directors and senior officials	10	6
Process, plant and machine operatives	2	3
Elementary occupations	2	0

…but a high proportion on the high street who are **not in work**

The Camberwell visitors appear to be disproportionately single, and consequently more likely than average for the borough to be living in single person households, and very highly likely to be living without children (Table 6).

Table 6: Household Structure

(Sample: n = 102)	Average %	Camberwell %
Single	41	49
Married	35	22
Civil Partnership	2	2
Living with partner	12	14
Divorced	4	5
Widowed	2	1
Separated	2	3
Number of Adults in the home:		
1	28	43
2	51	45
3	13	7
4 +	7	5
Number of 13-17s in the home:		
0	81	98
1	12	2
2 +	7	0
Children under 13:		
0	78	92
1	13	7
2	7	1
3 +	2	0

An above average population of **young singles**

Finally, Table 7 describes the ways in which the survey respondents occupy their homes: by far the largest proportion are in rented accommodation, and while this is typical of the borough, the skew on Denmark Hill was extremely pronounced, perhaps reflecting both the young age profile of the sample and the larger than average number of single people on the high street there.

Table 7: Home Ownership

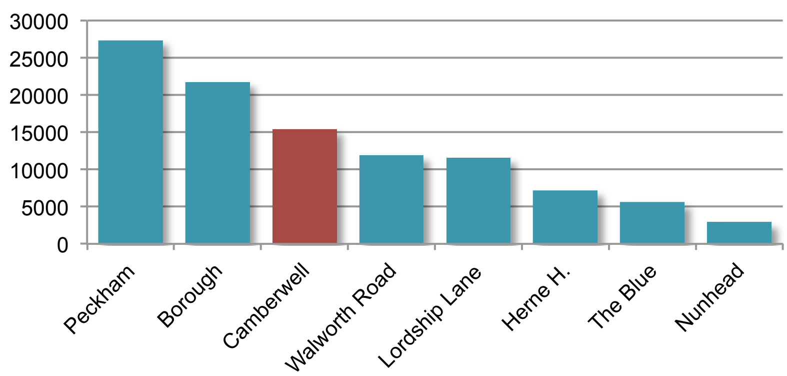
(Sample: n = 102)	Average	Camberwell %
Rent	52	70
Own it outright or with a mortgage	31	24
Shared ownership or Housing Association	6	0
Live there rent free	5	1
Other/ No response	7	5

A majority of visitors to Denmark Hill live in ***rented accommodation***

4. Footfall Distributions

Denmark Hill Camberwell is among the busier high streets observed. Over the course of two days over 15,000 pedestrians were counted passing on either side of the street. This amounts to an average footfall density of 1100 people per hour, comparable with the peak flow at some moderately busy West End locations such as Marylebone High Street.[1] Figure 1 compares the footfall at Camberwell with the eight high streets in the study. Peckham Rye and Borough have higher densities, but are both different in character.

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



[1] The Retail Group Marylebone High Street 2013 Health Check Report. Available at: http://transact.westminster.gov.uk/docstores/publications_store/05_Final_Marylebone_HighSt_HC_Dec13.pdf

4.1 Weekend & Weekday Ratio

Table 8 highlights the density ratio between Saturday and Tuesday. On Denmark Hill, unlike some other centres in Southwark, it appears that the ratio remains relatively constant between the two days.

Table 8: Comparative footfall by day: February 2015

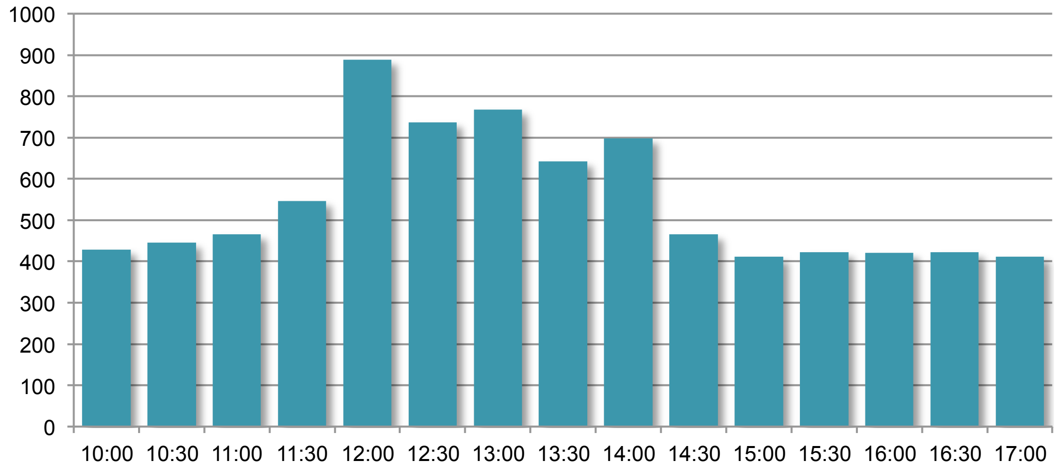
Observations recorded continuously from 10.00 to 17.00 on each day. Hourly data rounded

	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**	

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

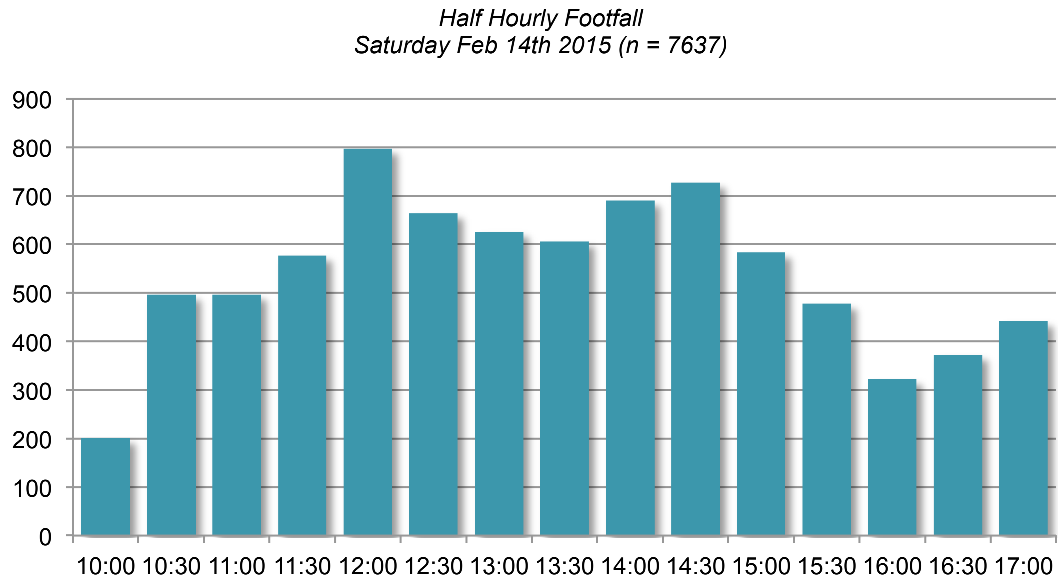
4.2 Footfall Count: Tuesday

Half Hourly Footfall
Tuesday Feb 10th 2015 (n = 7759)



Tuesday footfall on Denmark Hill peaked at twice the morning density at 12.00, before returning to the earlier level at around 3.00 for the remainder of the observation period.

4.3 Footfall Count: Saturday



A similar peak was observed on Saturday, but the traffic built up rather more dramatically from a slow start, while the afternoon dropped away slightly later, from 3.00. These patterns indicate a strong lunchtime trade across the week, and suggest that the retail mix of foodservice and other services such as banking may be closely meeting at least some aspects of local demand.

The pattern suggests a *"make hay while the sun shines"* strategy, suggesting 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 & Mode of Transport

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

Table 9 is ordered by size, and shows that over half of the respondents (58%) lived in the local postcode, SE5. The second highest area, SE22 is adjacent but drew just 6% of the sample. The remainder lived in twenty further postcodes, spread largely but not exclusively from 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% across all high streets. 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

Home Postcode	%
SE5	58
SE22	6
SE17	5
SE1	4
SE15	4
N1	2
SE2	2
SE24	2
SW2	2
E1	1
E15	1
EC24	1
SE19	1
SE23	1
SE3	1
SE6	1
SE7	1
SE8	1
SW16	1
SW3	1
SW8	1

Over half the visitors **are from SE5**

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 90% of the visitors interviewed considered themselves to be local to Denmark Hill by virtue of where they lived or worked. The proportion claiming to live locally is ten points above the average for the total survey, and travel time for most (84%) was under 30 minutes. No respondent had travelled for over an hour on that day to be there.

Table 10: How Local?

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

(n = 102)	Average %	Camberwell %
Living Locally	52	63
Working Locally	14	12
Both	17	15
Those who travelled...		
Less than 30 minutes	74	84
Between half & one hour	22	16
1 to 2 hours	3	0
Over 2 hours	1	0

… and consider themselves **to be local**

5.2 How did they get there?

The proportion of respondents who had walked to Denmark Hill is well above the average for the entire survey, and the high street is a major interchange for buses travelling through South East London so it is hardly surprising that another third had travelled by bus.

Table 11: Transport
What was your main form of travel to get here today?

(n = 102)	Average %	Camberwell %
Walk	48	**62**
Bus	22	**30**
Cycle	6	**4**
Train	6	**1**
Tube	5	**1**
Car	11	**1**
Other	0	**1**
Taxi	1	**0**

Almost everybody arrives ***on foot or by bus***

Fewer than average had travelled on a bicycle, very few (1%) had come by car, and despite the proximity of Denmark Hill Over ground station, rather fewer than expected had arrived by train. The picture is one of a local population using the centre because it is convenient and easy to access either from home or work.

6. Consumer Behaviour

6.1 Frequency and Dwell Time

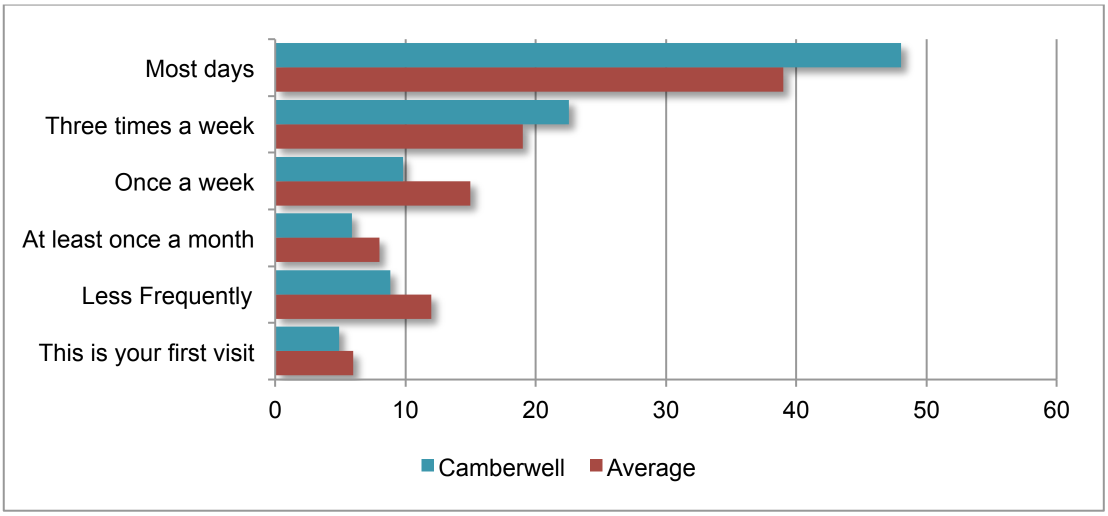
The survey established the frequency with which Camberwell visitors came to the high street and how long they stayed. These values were compared with the total responses to identify some characteristic features of visitor behaviour on Denmark Hill.

Figure 4 reveals that frequency of visit is above average, with almost half coming to the high street every day. About a further quarter of the respondents stop here three times a week. To make sense of these numbers it is also important to ascertain the duration of these visits.

Respondents were asked how long they intended to stay on the high street, and Table 12 indicates that visits to Denmark Hill are most likely to be short. 48% 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. Slightly more respondents than average (25% vs. 21%) intended to stay on the high street for up to an hour.

Figure 4: Frequency of Visit

"How often do you visit this high street?"



Almost half visit ***every day***

These values contrast unfavourably with the average dwell times recorded at Westfield White City, where visitors spend two hours thirty five minutes on an average trip[2]. The disparity highlights the difference between convenience and destination shopping, and is perhaps explained by the number of people on the high street each lunchtime, most likely on a break from work. Visit frequency rather than dwell time thus appears to be a useful distinctive feature of the shopping patterns in Denmark Hill.

Table 12: Dwell Time

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

(n = 102)	Average	Camberwell
Up to 15 minutes	22	18
15 – 30 minutes	26	30
30 minutes – 1 hour	21	25
1 – 2 hours	17	16
2 – 3 hours	4	8
3 – 4 hours	2	0
More than 4 hours	8	3

Short & sweet: half the visitors will spend ***half an hour or less.***

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

6.2 Intended Purpose of visit

Respondents were asked to name "the main purpose of your visit here today". 41% said they were shopping, 20% passing through, 18% eating, drinking or meeting friends, and 13% 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.

Nearly three quarters said they would be shopping. In addition, two thirds intended to visit a restaurant, café, pub or takeaway, or to meet friends, and a quarter to use financial and other services. Both these scores are above survey average and may represent an opportunity for local businesses to meet local demand better and more profitably.

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?

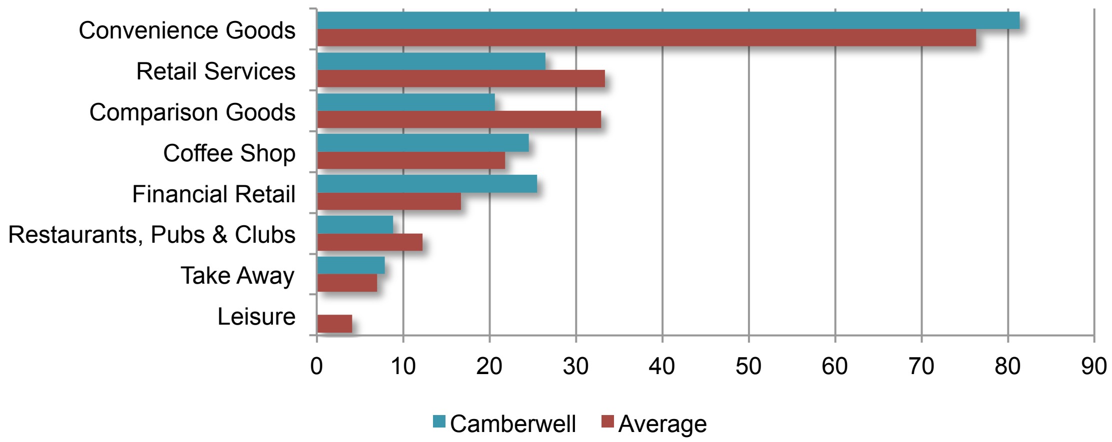
Purpose of Visit *(Main & Secondary n = 102)*	Average %	Camberwell %
Shopping	45	41
	30	31
Total	75	***72***
Travelling through	23	*20*
	23	13
Total	46	***32***
Eating, Drinking, Leisure	18	18
	35	42
Total	53	***60***
Fitnesss, Health, Finance	6	*13*
	8	13
Total	14	***25***
Other	8	9
	4	2
Total	12	***10***

Nearly **three quarters are shopping today.**

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

In addition to the intention questions reported in Table 13, 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 bears out the emerging picture of consumer behaviour on Denmark Hill, with above average numbers visiting banks and building societies, take away outlets, coffee shops and convenience stores. Comparison goods, leisure outlets, restaurants and retail services score below average.

6.4 Claimed Average Spend

The nature of the shopping on Denmark Hill is best defined as little and often. Table 14 indicates that the average intended or claimed spend is low, with almost three quarters expecting to part with less than £20.00. A further 25% intended to spend between £20 and £40. The proportion of those expecting to spend £10 to £20 is higher by a third in Denmark Hill than elsewhere in Southwark.

Table 14: Claimed Average Spend

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

(n = 102)	Average	Camberwell
	%	%
Less than £10	32	27
£10 - £20	29	42
£20 - £30	16	14
£30 - £40	10	10
£40 - £50	7	4
£50 - £70	4	3
More than £70	3	0

Average spend is low, but **not the lowest**.

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, Camberwell does slightly better, with somewhat fewer visitors in this category.

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. Camberwell however appears to draw most of its visitors not for comparison goods shopping but for a variety of everyday reasons which might include banking, lunchtime snacks and meals and convenience top-up purchases.

Table 15: Duplication of High Streets

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

(n = 102)	Camberwell	%
West End	18	18
Brixton	17	17
Peckham	7	7
Westfield Stratford	5	5
Elephant and Castle	4	4
East Dulwich	4	4
Bromley	2	2
Walworth Road	2	2
Lewisham	2	2
East Street Market	2	2
Total		**62**
21 alternatives		

Table 15 indicates the biggest high streets with which Camberwell is competing for footfall. The top four locations named are all destinations for comparison shopping, offering wide retail choice, often from big brand name retailers. After the top three locations named, the number of respondents identifying any location declines rapidly. The total list of competing alternatives is long reaching 21 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 Camberwell shoppers can also be found in the West End, Brixton, Peckham or Stratford Westfield. This is hardly surprising, but it doesn't necessarily mean that Camberwell should try to compete on that basis. The shoppers on Denmark Hill 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

Camberwell is as busy as some West End locations, and the third busiest high street in this survey. Visitors are very likely to live and/or work locally and to arrive at lunchtime. Denmark Hill is a convenient walk or short bus ride away, and so they visit very frequently, for snacks and coffees, for banking, or for top up shopping. Most intend to spend some money on the trip, even if they are just passing through and probably somewhere between £10 and £20, which is slightly above the survey average. Such "little & often" shopping becomes habitual and it 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 Denmark Hill.

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 Camberwell scores very strongly on convenience, which is obviously a key motivating factor. After that the most popular features all score slightly lower than the average particularly on the available choice of outlets and on the environment itself. The existence of a particular service is a draw for just 6% of visitors.

Table 16: What's good….?

What most attracts you to this town centre?

	Average	Camberwell
	%	%
Proximity or Convenience	**47**	59
Range of shops	**21**	18
Range of places to eat or drink	**10**	8
Attractive environment	**7**	0
A specific retailer or service	**4**	6
Ease of Parking	**2**	0
Other	**10**	10

The available choices are just about average,
the motivation to visit is **simply convenience**

This might indicate a way for individual retailers to compete for available footfall since visitors appear to be expressing a *"because it's there…"* view of the facilities. On this basis any retailer or café that stands out through exceptional quality or service might then well draw more trade.

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 once again the lack of choice in stores and in foodservice. The next largest (just 10%) were comments about the public realm and the need for a new and safer pedestrian crossing.

The list of missing attributes was developed from open-ended questions across the full survey so it can be seen that Camberwell does suffer from the full range by any means. Few complained about parking and only some missed a sense of community.

Table 17: What's bad…..?

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

	Camberwell	
Respondents	***102***	
A Wider Range of Stores	**42**	41%
Transportation & Public Realm	**10**	10%
Cafes	**3**	3%
Parks & Green Space	**3**	3%
Leisure Activities	**2**	2%
Cinema	**2**	2%
Social & Community	**2**	2%
Variety of Restaurants	**1**	1%
Parking	**1**	1%
Bank/ATM	**0**	0%
Bars & Pubs	**0**	0%
Gyms	**0**	0%
Police Station	**0**	0%

A wider range of stores and **more choice** is suggested

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 Camberwell 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: over 40% of respondents claim to use one or other of the main local papers for information. Although online is fairly effective at 14% its reach by channel is fragmented and 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.

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 Denmark Hill 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 then be easily generated.

Table 18: Local Media Reach

Where do you mainly get your local news from?

	Average %	Camberwell %
TV	**32**	33
South London Press	**7**	18
Other Online	**15**	14
Other (Traditional)	**8**	12
Southwark News	**7**	9
Word of Mouth	**15**	4
Radio	**8**	4
Southwark Life Magazine	**1**	2
S.E.1 Magazine	**2**	1
Southwark Business Today	**0**	1
Southwark & Bermondsey News	**2**	0

Traditional media is **still cheap & highly effective**

8.2 Advertising Recall

Unprompted recall of advertising for local events was then tested. Scores were low: about 14% could recall such advertising, and were then prompted to describe it. Table 19 lists the various responses, which are also then individually 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.

In some ways this also describes the population on any high street: they are there for very wide ranging reasons, but they are all likely to spend some money in passing.

Table 19: Local Advertising Recall

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

	Camberwell
(n = 102)	%
Yes	14
When Prompted:	
Specials at pubs	2
Park - Charity run	2
Council	1
Disco	1
Farm event posters	1
Friends of Camberwell Green	1
Helipad	1
Vogue	1
Jazz	1
Park, join the army	1

Low unprompted recall for individual messages

8.3 Community Engagement

When asked to recall any community or local events they had attended in the past year, the response was also low: just 12%. Given the sample size this is not necessarily disappointing.

Interestingly, the question generated a different list of events from the respondents. Several visitors were able to recall an exhibition at the art school. Once again however the list indicates engagement with both community and 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 = 103)	Camberwell (Count)
Art School Exhibition	4
Jazz Creep	2
Charity Event	1
Church	1
Community council meetings	1
Museum	1
Specials at pubs	1
Valentines Dance	1
Film Show	1

Low unprompted recall for individual 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%. Camberwell shoppers are even less likely than average to take advantage of these mechanics: only 8% used a coupon, just on the Southwark average.

Table 21: Promotional Reach

Have you used any of the following today?

	Average %	Camberwell %
Coupons	7	8
Social media promotion	7	0
Email Promotion	6	1
Store Locator	4	4
Service Locator apps	4	4
Voucher apps	3	3
QR Codes	2	3
Total	32	23

9. Conclusion

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

- **Footfall density is comparatively high and constitutes a willing target market.** On average *1100 people per hour* pass up or down Denmark Hill, levels comparable to some West End locations. Peak flows occurred between 12 and 3 on Saturday and Tuesday. Almost all intended to spend money on Denmark Hill, even those just "passing through" – three quarters were shopping and two thirds looking for food or drink.

- **Local customers, shopping little & often.** The biggest advantage for businesses on Denmark Hill is the convenience of the location for a large catchment of local shoppers. However, while frequency of visit is high and spend a little above average, most visitors are rather unenthusiastic about what is on offer. They are on the high street for a limited time simply because it is nearby and easy.

- **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 the 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 encourage footfall through advertised events in the local press.