Southwark high streets: **Peckham Rye**

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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: The Rye Lane retail mix is skewed towards both comparison and convenience goods, but lacks take-away outlets and coffee shops. It has some national brand retailers and is seen as a shopping destination by many on the street. As such it is competing for shoppers with centres ranging from Brent Cross and Blue Water to Lewisham and Brixton.

The People on Rye Lane: The available consumers are largely young, single and mainly in work: those without jobs are at the UK average level. 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. Some come from further afield, including visitors from Dalston and Greenwich.

Footfall Densities: The footfalls on Rye Lane are highest observed in this study and on average they reach nearly 2,000 people per hour, comparable with some busy West End locations. Saturday is 50% busier than Tuesday, and both days show peaks during the middle part of the day, possibly coinciding with work breaks.

Consumer Behaviour: Most visitors to Rye Lane come frequently – every day or every other day. They spend slightly above the average, and stay slightly longer than average. Most visitors will spend something, whatever other reason they have for being there.

Attitude & Usage: For some the main motivation for being on the high street is convenience: few visit to patronise a specific business, and the choice of shops while limited is not an issue. For others, the destination is used for comparison goods shopping, for fashion and accessories and here around a quarter stated that the range of stores is poor. Since hardly any other criticism was made this can be taken as a crucial finding. For this consumer segment continued patronage of Rye Lane depends upon it being a competitive alternative to neighbouring retail malls including Westfield Stratford and the West End.

Marketing interventions to promote local events appear to have had little effect. There is negligible awareness of local advertising or of local events. What awareness there is has been split between commercial and community messages, and the main channels through which the population can be reached are fragmented online social media channels. There is some awareness and usage of online local bulletin boards.

The uptake of marketing promotions, especially digital marketing tools, is extremely low. Just 12% of respondents said they would be using any promotional mechanic on the day, about a third of the already low Southwark average.

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 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 1, 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: Peckham Rye

	Peckham Rye	Average %
Number of Stores:	**99**	**80**
	%	*%*
Foodservice *Restaurants, Cafes, Coffee Shops*	10	25
Financial Services *Banks, Building Societies, Post Office, Loan Shops*	1	11
Mixed Non-Food Retail *Clothing, Shoes Accessories, DIY, Toys*	31	25
Personal Care *Hairdressing, Beauty/Tanning shops, Doctors*	16	13
Technology *Phone Shops, PC repairs, Electricals*	10	4
Entertainment *Betting Shops, Libraries*	2	4
Grocery *Multiple & specialist independent retail*	29	17
	100	100

Table 1 compares the number and types of stores identified on Rye Lane with the distribution seen across all the high streets in the study. In total 99 different businesses were counted on both sides of the street in this section of Peckham's retail centre. This is above the average of the eight centres studied. Of the 26 categories in the analysis 20 were represented on Rye Lane, giving a diversity index of 0.77.

The retail mix on Rye Lane was observed to be skewed towards comparison goods, technology and grocery retail, and scores rather lower on financial and other services including banks and loan shops, bookmakers and personal care. The provision of restaurants, takeaways and coffee shops is below average.

Peckham Rye is a major transport interchange with a railway station and many bus routes passing through, and was the busiest site in the study.

Peckham Rye is one of two destination retail centres observed in the study, offering a wide range of shopping outlets, a bustling environment and at least some comparison goods stores including major national brands. It draws shoppers from across the borough.

3. Respondent Demographic

The students interviewed 91 respondents over two days, Tuesday and Saturday. The demographic make-up of that sample is described in this section, and compared with the Southwark population reported in the census and/or with overall survey results.

Table 2: Demographics

(n = 91)	Average %	Peckham Rye Lane %
18 – 24	**18**	24
25 – 34	**30**	33
35 - 44	**23**	22
45 – 54	**15**	12
55 – 64	**7**	7
65 – 74	**5**	0
75 or older	**2**	0
Male	**47**	62
Female	**53**	38

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 Rye Lane. Both results show a bias towards the younger groups, but slightly more pronounced in the Peckham sample; it is close to the Southwark demographic distribution except that respondents are skewed 60/40 by gender with a male bias.

Table 3: Ethnicity Overview

	Average	Southwark	Peckham Rye Lane
(n = 91)	%	%	%
White	**61**	**54**	25
Black	**19**	**26**	56
Asian	**8**	**10**	8
Mixed	**9**	**6**	9
Other	**1**	**3**	2

Ethnicity of the sample is **skewed towards black respondents.**

In terms of ethnicity, Table 3 compares the respondents in Rye Lane with the survey averages and with Southwark population data. The shoppers in Peckham were twice as likely to fall into the various black and mixed ethnicities. In terms of education, the sample was slightly less educated than the average for the borough, although half still had a university degree.

Table 4: Education

	Average	Peckham Rye Lane
(n = 91)	%	%
Compulsory Education at School	**14**	11
Vocational or College or 6th Form	**31**	38
University	**55**	51

Most achieve **further and higher education**

The occupations of the respondents on Peckham Rye Lane were largely in line with the survey averages (Table 5) with over a quarter not currently working, and rather fewer in professional work. A higher than average proportion were working in sales and customer service.

Table 5: Occupation

(n = 91)	Average %	**Peckham Rye Lane %**
Not currently working	23	**25**
Sales and customer service occupations	17	**24**
Caring, leisure and other service occupations	10	**12**
Administrative and secretarial occupations	8	**11**
Professional occupations	20	**10**
Managers, directors and senior officials	10	**9**
Skilled trades occupations	6	**5**
Associate professional and technical occupations	4	**2**
Elementary occupations	2	**1**
Process, plant and machine operatives	2	**0**

… fewer professionals than expected but **more in sales & customer service**

Respondents were disproportionately single, and consequently more likely than average for the borough to be living in single person households without children (Table 6).

Table 6: Household Structure

(n = 91)	Average %	**Peckham Rye Lane %**
Single	41	**52**
Married	35	**32**
Civil Partnership	2	**1**
Living with partner	12	**7**
Divorced	4	**3**
Widowed	2	**0**
Separated	2	**4**
Number of Adults in the home:		
1	28	**40**
2	51	**41**
3	13	**15**
4 +	7	**4**
Number of 13-17s in the home:		
0	81	**88**
1	12	**4**
2 +	7	**8**
Children under 13:		
0	78	**80**
1	13	**17**
2	7	**2**
3 +	2	**1**

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 Rye Lane is 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

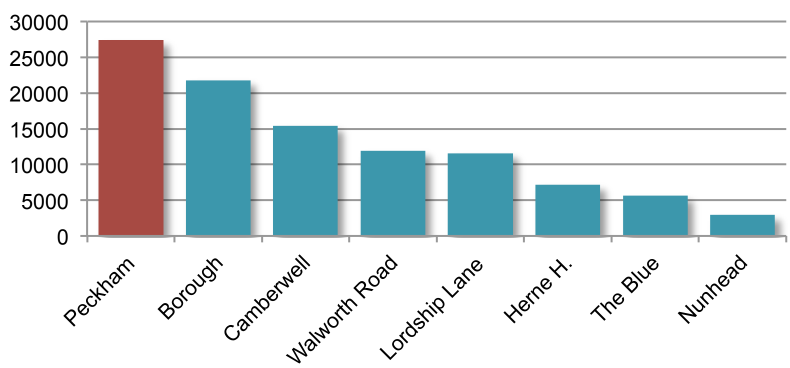
(n = 91)	**Average** %	**Peckham Rye Lane** %
Rent	52	63
Own it outright or with a mortgage	31	14
Shared ownership or Housing Association	6	14
Live there rent free	5	5
Other/ No response	7	4

Two thirds in ***rented accommodation***

4. Findings: Footfall Distributions

Rye Lane Peckham is the busiest high street observed in the study. During the course of two days, over 27,000 pedestrians were counted passing on either side of the street. This amounts to an average footfall density of 1,900 people per hour, comparable with the peak flow at some busy West End locations such as Berwick Street Market.[1] Figure 1 compares the footfall at Rye Lane with the eight high streets in the study. Only Peckham Rye and Borough exceeded 20,000 pedestrians, but they are both rather different in character.

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



[1] http://transact.westminster.gov.uk/docstores/publications_store/08_Final_BerwickSt_HC_Dec13.pdf

4.1 Weekend & Weekday Ratio

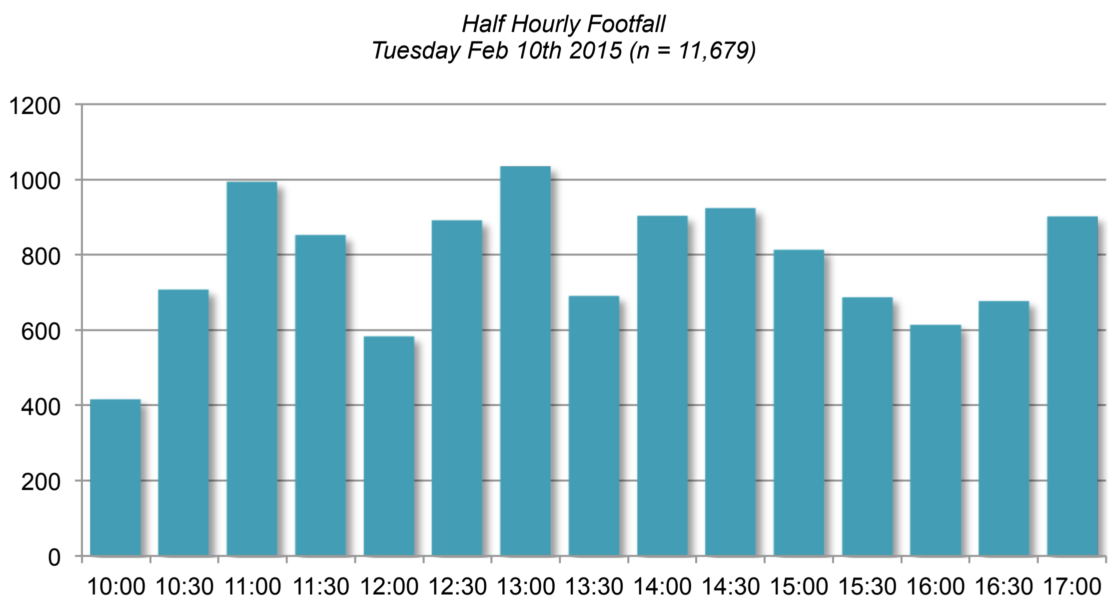
Table 8 highlights the density ratio between Saturday and Tuesday. On Rye Lane, unlike some other centres in Southwark, it appears that Saturday footfall increases by 50% over Tuesday.

Table 8: Comparative footfall by day: February 2015

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

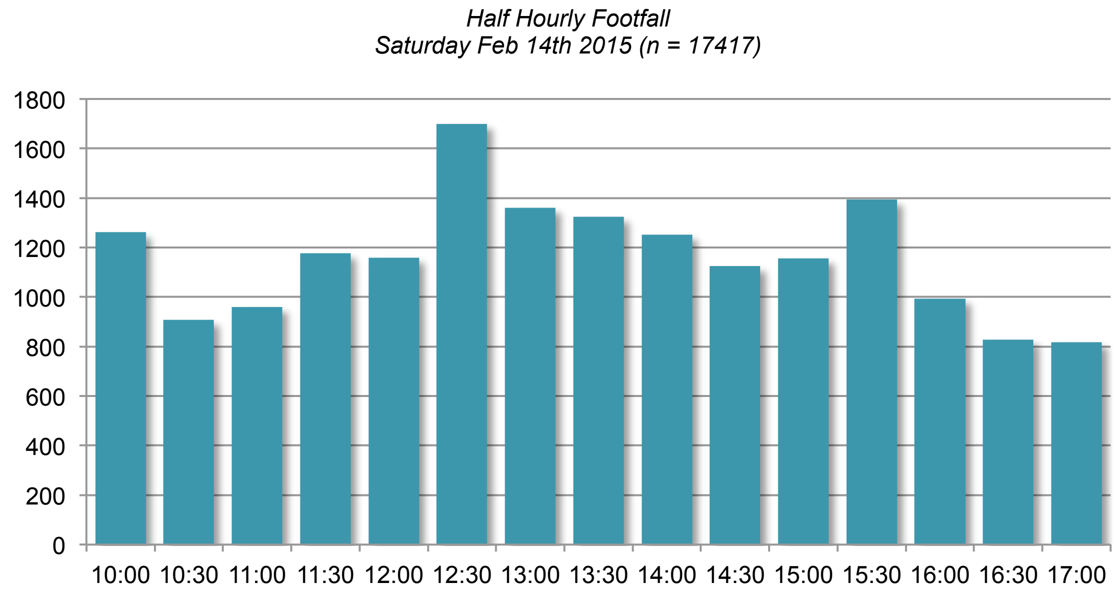
	Tuesday	Saturday	Total	Average Hour
Peckham (Rye Lane)	10778	16599	27377	1900
Borough High Street	11569	10204	21773	1600
Camberwell	7759	7637	15396	1100
Walworth Road	5527	6369	11896	850
Lordship Lane	2954	8645	11599	830
Herne Hill	2851	4330	7181	500
The Blue	2677	2945	5622	400
Nunhead Lane	1282	1648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

4.2 Footfall Count: Tuesday



Tuesday footfall shows a number of pulses during the day, at 11, 13, 14.30 and 17.00. These may relate to work place breaks or to public transport, but further research may be required to identify the underlying causes.

4.3 Footfall Count: Saturday



Saturday shows a more even build to a lunchtime peak, followed by a gradual decline over the afternoon. Nevertheless another spike is apparent at 15.30, which is also unexplained at present, although it could be a surge of people returning home, matching the 10.00 arrivals.

5. High Street Catchment Area, Travel Time & Method

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

Almost half of the respondents (43%) lived in the local postcode, SE15. A further 13% were drawn from Camberwell nearby, and another 20% from Greenwich, Lewisham, New Cross and Borough. The remainder lived in 12 further postcodes, from Guildford to Dalston.

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

	Peckham Rye Lane
	%
SE15	43
SE5	13
SE13	7
SE14	7
SE18	5
SE1	3
SE22	3
SW2	3
E10	2
E12	2
E8	2
GU1	2
RG4	2
SE11	2
SE16	2
SE6	2
SW18	2
W2	2

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 67% of the visitors interviewed considered themselves to be local to Rye 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 (70%) was under 30 minutes. Nevertheless people are travelling a little further to get to Peckham with above average numbers spending between 30 minutes and an hour.

Table 10: How Local?

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

	Average	Peckham Rye Lane
	%	%
Living Locally	52	56
Working Locally	14	11
Both	17	21
Those who travelled...		
Less than 30 minutes	74	70
Between half & one hour	22	27
1 to 2 hours	3	1
Over 2 hours	1	1

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

5.2 How did they get here?

Peckham Rye is a major interchange for buses travelling through South East London so it is hardly surprising that almost a half (twice the average) had travelled to the centre by bus. Table 11 helps to confirm the picture of the typical visitor as travelling a bit further however, since only just over a third had come to the high street on foot, rather less than expected.

Fewer than the survey average had travelled on a bicycle, few (8%) had come by car, and about the same number arrived by train. The picture is of a fairly local population drawn to the centre by bus from neighbouring boroughs because it offers a good choice of retail options without travelling into the centre of town, or right out.

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

(n = 91)	Average %	Peckham Rye Lane %
Bus	22	**44**
Walk	48	**37**
Car	11	**8**
Train	6	**7**
Cycle	6	**3**
Tube	5	**1**
Taxi	1	**0**
Other	0	**0**

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

6. Consumer Behaviour

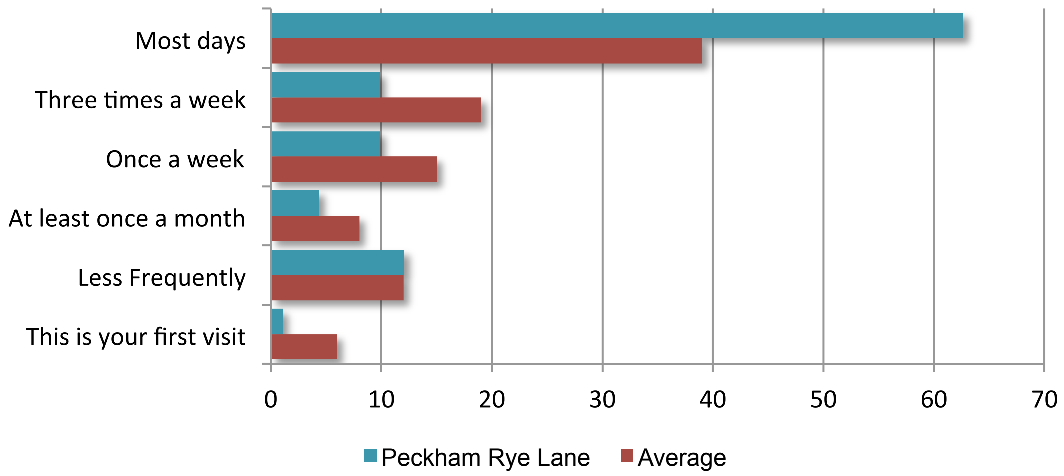
6.1 Frequency and Dwell Time

The survey established the frequency with which visitors came to Rye Lane and how long they stayed. These values were compared with the total responses to identify some characteristic features of visitor behaviour in Peckham.

Figure 4 reveals that frequency of visit is well above average, with two thirds coming to the high street every day. A further 10% of respondents stop here three times 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 daily destination ***for very many***

Respondents were asked how long they intended to stay on the high street, and Table 12 indicates that visits to Rye Lane are likely to be longer than average. A quarter of respondents intended to be there for between one and two hours and a further 19% intended to stay four hours or more. This is an unusually long dwell time and suggests that Rye Lane is a different type of High Street from the majority observed in this study.

The values contrast favourably with average dwell times recorded at Westfield White City, where visitors spend two hours thirty five minutes on an average trip[2] and they suggest the browsing behaviour that typifies comparison goods shopping.

Table 12: Dwell Time

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

(n = 91)	Average	Peckham Rye Lane
Up to 15 minutes	22	14
15 – 30 minutes	26	18
30 minutes – 1 hour	21	15
1 – 2 hours	17	27
2 – 3 hours	4	5
3 – 4 hours	2	1
More than 4 hours	8	19

Nearly a fifth of visitors will spend ***four hours or more.***

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

6.2 Intended Purpose of visit

Respondents were asked what "the main purpose of their visit was today". 57% said they were shopping, 30% passing through, just 7% eating, drinking or meeting friends, and 1% intended to visit a bank, building society or other professional service.

Since most high street visits are unlikely to be for a single purpose we 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.

Almost all (90%) said they would be shopping. A third intended to visit a restaurant, café, pub or takeaway, or to meet friends, and a quarter to use financial and other services. The proportion intending to go shopping is substantially above the survey average, although all other scores are rather lower than expected, including the use of restaurants, take-aways and coffee shops.

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?

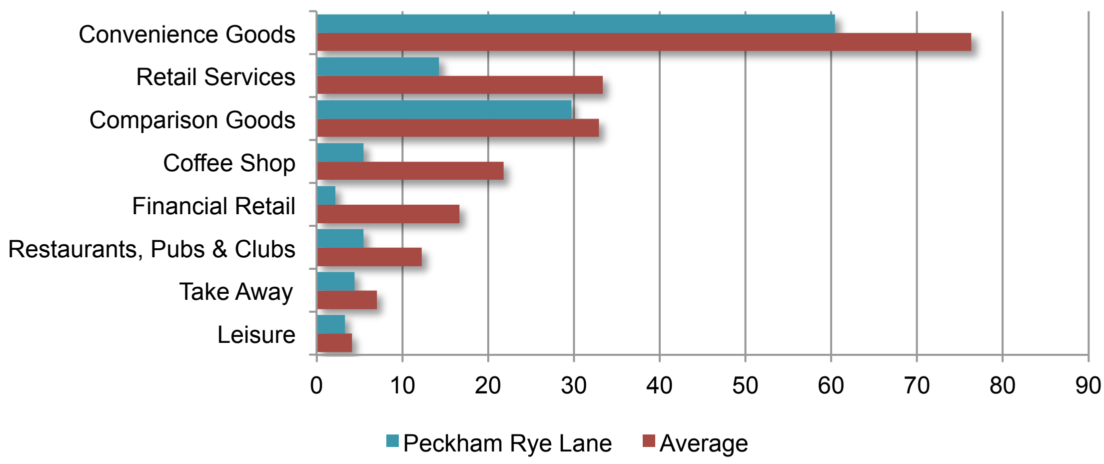
Purpose of Visit Main & Secondary	Average %	Peckham Rye Lane %
Shopping	45	57
	30	33
	75	***90***
Travelling through	23	*30*
	23	21
	46	***51***
Eating, Drinking, Leisure	18	7
	35	23
	53	***30***
Fitnesss, Health, Finance	6	*1*
	8	5
	14	***6***
Other	8	5
	4	17
	12	***23***

Nearly **all are shopping today.**

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 bears out the emerging picture of consumer behaviour on Rye Lane, with most respondents having visited retail outlets of some description: it is interesting to note that the largest category visited is convenience goods stores rather than comparison goods however. Other services are all well below the average.

6.4 Claimed Average Spend

The nature of the shopping on Rye Lane although based on frequent trips, is still catching above average spending. Table 14 indicates that the average intended or claimed spend is higher than average, with the bands up to £30 and £40 showing a substantial positive variance. Nevertheless it is still true that over half of the respondents intend to spend under £20 on the visit, more typical of the little and often pattern seen elsewhere in the borough.

Table 14: Claimed Average Spend

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

(n = 91)	Average	Peckham Rye Lane
	%	%
Less than £10	32	26
£10 - £20	29	25
£20 - £30	16	21
£30 - £40	10	14
£40 - £50	7	5
£50 - £70	4	5
More than £70	3	5

Spend is ***higher than average*** - up to £40 per trip

The average spend across all eight observed high streets shows that a third of all Southwark shoppers intend to spend less than £10 per visit and so on this basis Peckham Rye does slightly better in line with its use a destination shopping centre.

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. Rye Lane however appears to serve both functions – a destination for comparison goods shopping, as well as a convenient and frequent destination for top-up and distress purchases.

Table 15: Duplication of High Streets

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

(n = 91)	Peckham Rye Lane	%
Lewisham	23	25
West End	11	12
Brixton	8	9
Westfield Stratford	6	7
East Street	5	5
Croydon	3	3
Camberwell	3	3
Blue Water	3	3
Brent Cross	1	1
Clapham	1	1
		70
21 alternatives		

Table 15 indicates the biggest high streets with which Rye Lane 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, but the most popular is the nearest, Lewisham.

After the top three locations named, the number of respondents identifying any other location declines rapidly. The total list of competing alternatives reaches 21, yet over 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 Rye Lane shoppers can also be found in the West End, Brixton, or Stratford Westfield as well as down the road in Lewisham. This is hardly surprising, but it implies that Rye Lane probably alone among all of the eight high streets surveyed needs to compete more strongly with the major centres in order to encourage more people to visit Peckham more often and spend more money.

Some shoppers on Rye Lane are there because it is convenient and fits into their routine. They spend little per trip, but the location is familiar and visiting habitual creating a sizable opportunity for local and national retailers to trade them up to stay longer and spend more.

But another part of the fight must be to attract more visitors from the bigger centres. This may involve improving the retail mix and general offer.

6.6 Consumer Behaviour: Summary

Peckham Rye is a very busy high street with good transport links and a range of convenience and comparison retail outlets. It appears to be light on some attributes of a major retail centre especially foodservice outlets. Visitors appear to be somewhat split, occasionally treating it like a local centre, with many using the convenience stores and spending little, but for others and on other occasions it provides a longer browsing and shopping experience with higher spends and longer dwell times allowing it to draw visitors from further afield.

7. Attitudes to the High Street

Consumer behaviour may be shaped by attitude and so the survey investigated how high street visitors judged the experience on Peckham Rye.

In Table 16 the attributes that most attract the visitors are identified. The table is ordered by the average Southwark results, and it can be seen that Peckham scores very strongly on convenience, which is obviously a key motivating factor, but it also scores well on the range of shops on offer, and the environment. As might be expected, visitors do not come to Peckham Rye for the range of places to eat or drink – as noted the street is not well served with these. The existence of a particular service is however a draw for just 2% of visitors.

Table 16: What's good….?

What most attracts you to this town centre?

	Average	Peckham Rye Lane
	%	%
Proximity or Convenience	**47**	47
Range of shops	**21**	32
Range of places to eat or drink	**10**	3
Attractive environment	**7**	8
A specific retailer or service	**4**	2
Ease of Parking	**2**	1
Other	**10**	7

This might indicate that shoppers are by and large satisfied with the facilities and ambience of Rye Lane, and yet when asked specifically what they thought might be improved or what they felt was missing, the biggest gripe by far, as reported in Table 19, was ***a lack of choice in stores (25%) and in foodservice (12%)***. Almost nothing else was mentioned.

The list of missing attributes was developed from open-ended questions across the full survey and so it can be seen that Peckham does not suffer from the full range of problems any means.

This is a therefore an important finding – Rye Lane is extremely busy, but it may live or die by its ability to generate footfall from local catchment and draw from competing shopping centres (including the malls at Stratford and Bluewater) with which it competes more closely than the other Southwark high streets. Future developments on Rye Lane could therefore plan to attract big name retailers where possible, on the basis of the existing footfall.

Table 17: What's bad.....?

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

	Peckham Rye Lane	
Respondents	***91***	
A Wider Range of Stores	**23**	25%
Variety of Restaurants	**7**	8%
Cafes	**4**	4%
Transportation & Public Realm	**2**	2%
Leisure Activities	**1**	1%
Bank/ATM	**0**	0%
Bars & Pubs	**0**	0%
Parking	**0**	0%
Cinema	**0**	0%
Parks & Green Space	**0**	0%
Social & Community	**0**	0%
Gyms	**0**	0%
Police Station	**0**	0%

For a destination location there is a strong perception that ***the range of stores is disappointing***

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 Peckham 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 strength of online channels in this location: over 30% of respondents claim to use social media and other digital channels for local news, twice the average and perhaps a reflection of the youthful profile in this location. The Southwark News has an average reach but amongst visitors to Peckham no other channel is particularly strong.

Table 18: Local Media Reach

Where do you mainly get your local news from?

	Average %	Peckham Rye Lane %
TV	32	35
Other Online	15	29
Southwark News	7	8
Radio	8	3
South London Press	7	3
Other (Traditional)	8	2
Word of Mouth	15	0
Southwark & Bermondsey News	2	0
S.E.1 Magazine	2	0
Southwark Life Magazine	1	0
Southwark Business Today	0	0

Online media dominate

Word of Mouth was hardly considered as a source of information. For independent businesses on Rye Lane digital marketing may work but there is an issue of fragmentation because the category includes all social media as well as local bulletin boards and websites.

8.2 Advertising Recall

Unprompted recall of advertising for local events was then tested. Scores were extremely low to the point of being negligible. Only 5% could recall such advertising, and were then prompted to describe it. Table 21 lists the various responses, which are individually low, and even poorly transcribed. The advertising for these named events, two community and two commercial may have been separated in time by a few months and memories decay, but this list still represents a disappointing outcome.

Table 19: Local Advertising Recall
"Have you seen any advertising for local events recently?" Which events?"

(n = 91)	Peckham Rye Lane %
Yes	18
When Prompted:	
Billboards about the market	1
Community centre	1
Council Meetings	1
For Bussy Building	1
JD	1

Very low recall rates

8.3 Community Engagement

When asked to recall any community or local events attended in the past year, the response was again extremely low: just 5%. The question generated a different list of events from respondents covering social, commercial and community activities, but the impression is that the community engagement in Peckham is lower than average.

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

(n = 91)	Peckham Rye Lane
Church	1
Cinema	1
Club	1
Library, Festival	1
Party	1
Total	5
(Non-response = 95%)	

Extremely low community engagement

8.4 Promotional Reach

Finally Table 23 also 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%. Peckham shoppers are about a third as likely to take advantage of these mechanics: while only 3% used a coupon, slightly more than expected claimed to have used a social media promotion on the day, reflecting the greater adoption of digital channels among the users of the high street.

Table 23: Promotional Reach
Have you used any of the following today?

	Average %	Peckham Rye Lane %
Coupons	**7**	3
Social media promotion	**7**	5
Email Promotion	**6**	1
Store Locator	**4**	2
Service Locator apps	**4**	0
Voucher apps	**3**	0
QR Codes	**2**	0
Total	**32**	12

Peckham shoppers are not very marketing savvy

9. Conclusion

The data collected in Rye Lane lead us to conclude the following:

- **Footfall density is extremely high and the high street is bustling.** On average *almost 2,000 people per hour* pass up or down Rye Lane, levels comparable to busy West End locations. Saturday footfall is 50% higher than Tuesday.

- **Can the footfall be converted to cash?** While average spend and dwell time is higher in Peckham than it is on quieter Southwark high streets many visitors are still passing through and spending little money or time. There is a large part of the customer base seeking convenient top-up retailers, and the location lacks foodservice outlets, which might encourage extended visits.

- **Local high street or retail destination?** Peckham is competing more closely with the big retail offers in and out of town in its retail mix, which features some comparison shopping. Branded retailers draw footfall from across and beyond the borough, and consumers are already visiting for this. In order to compete the retail mix must be further improved in order to retain existing shoppers, convert convenience seekers and build footfall by drawing more shopping trips from a wider catchment. Peckham, which is easily accessible from across London by rail and bus, could become more of a destination if facilities were added or improved in order to offer more reasons to visit.

- **Be local.** The customer base is still predominantly local so there is a competitive opportunity for independent retailers to remain 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 local footfall through community events promoted in social media.

- **Be broad.** Some of the customer base is already travelling for longer than average times to be in Peckham. If the centre can be developed with wider appeal, either on its local merits or by adding further big name brands, footfall might be built from a wider catchment, exploiting the newer better connected transport routes.