Southwark high streets: project summary and overview of findings

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1. Introduction

In this report results from the analysis of the retail audit, footfall observations and interviews conducted on Tuesday 10th and Saturday 14th February 2015 on eight high streets across the borough are summarised and compared.

1.1 Summary of Findings

The Retail Mix: The average high street in Southwark has 80 shops and a reasonably broad mix of businesses and services. Walworth Road and Lordship Lane have substantially more stores and consequently greater choice, Nunhead Lane has a rather more limited selection. Most high streets are strong on grocery retail, and on foodservice, with comparison goods less widely available, but still accounting for 25% of the total stores observed. Brand names in grocery are widely seen, but in foodservice rather fewer are available except on busier streets where choice is already wider.

The people on the high street: The survey data was collected from 684 completed interviews across the borough. By and large the sample is representative of the resident population, being generally younger than the UK average and diverse in both ethnicity and in measures of affluence across the borough. Having established the typical Southwark shopper, each of the eight high streets revealed quite different characteristics based upon the variances observed from those means, and from the behavioural patterns established.

Footfall Densities: Southwark high street footfalls vary by around ten times between the busiest and the quietest. The highest densities were found in Peckham Rye, Borough High Street and Camberwell, with the quietest at Nunhead Lane and Southwark Park Road. Typical patterns show lunchtime peaks, followed by deep lows after around 2.30 during the week, while on Saturdays the footfall builds to reach a lunchtime peak, declines a little later but remains stable over the afternoon. There are some local variations. The busiest locations match the densities seen in some busy West end locations.

Attitude & Usage: The main pattern of usage across the borough is of local people visiting the high streets frequently and spending short periods of time and small amounts of money. This type of shopping is largely convenience driven, and often features visits to financial service providers, convenience stores and foodservice outlets of many descriptions. A typical example is Camberwell. Overlaying this pattern, a few high streets are also destinations in their own right, drawing visitors from a far wider catchment, but rather less frequently. These visitors spend more time and money. Typical destination streets are Borough High Street, Peckham Rye and Lordship Lane.

A further important pattern is the duplication of visits identified. Shoppers on any of the eight high streets also visit other retail centres, but the top ten alternatives named in Southwark included four Southwark locations. This is not entirely surprising since retail gravitation models usually combine accessibility with range of choice. The leading choice was The West End.

A third type of high street was identified – the local centre, represented by Nunhead and Southwark Park Road. Unlike the convenience locations which have high footfall but a low positive attitude, these streets are generally liked by their users, but those users are few in number and entirely local. Of the three categories this is the most challenging.

Marketing interventions have had some effect. There is some awareness (18%) of advertising for local events (commercial and cultural) on each high street. There is also some recall of having attended such events (25%). This suggests that interventions to drive high street footfall along these lines have some chance of success. It is true to say that the scores were significantly stronger in the more affluent areas of the borough.

The uptake of marketing promotions, especially digital marketing tools, is quite low and the best advertising channel for the local trade is likely to be the shop window. For the less frequent visitors, a wider campaign, probably online could generate increased foot traffic largely at the weekends by nudging existing but infrequent visitors. Within the borough, the local press still has good reach.

2. The Retail Mix

Table 1 compares the proportions of types of stores identified across the borough. The average high street had 80 different retail businesses (this varied widely between Walworth Road and Lordship Lane where over 120 businesses were counted, and Herne Hill with 47 to Nunhead Lane with just 26.)

The most strongly represented categories are foodservice and non-food retail at 25% of the total offer each. The first is divided between restaurants, cafes, pubs & bars, fast food take-aways and coffee shops. The non-food retail offer covers comparison goods from fashion, sporting goods and DIY stores to charity shops.

The next biggest category is grocery retail (17%), which includes multiple grocers and specialist food retailers. The analysis is made by number of stores not by retail space so it is possible that this figure is relatively low in comparison to the importance of the category.

Personal care (13%) includes beauty salons, nail bars and tanning shops as well GP surgeries, Financial services includes banks, post offices, building societies and loan shops. Technology and phone stores make a further 4% and entertainment (betting shops, libraries) contributes about the same to the overall 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. Southwark Park Road has a ratio of 0.92, Borough High Street, Camberwell, and Lordship Lane over 0.81, Peckham Rye and Walworth Road around 0.75 and Nunhead and Herne Hill are both around 0.6.

Grocery retail and foodservice are well represented on every high street. The missing categories are often in financial services and entertainment, but largely in comparison goods retail fashion stores, sporting goods and accessories. High streets with very low ratios are also missing some services, such as hairdressing.

Table 1: Distribution of Retailer & Service Categories on the High Streets

Retail Mix	Eight Southwark High Streets
Average Number of Stores:	80
	%
Foodservice	25
Restaurants, Cafes, Coffee Shops	
Mixed Non-Food Retail	25
Clothing, Shoes Accessories, DIY, Toys	
Grocery	17
Multiple & specialist independent retail	
Personal Care	13
Hairdressing, Beauty/Tanning shops, Doctors	
Financial Services	11
Banks, Building Societies, Post Office, Loan Shops	
Technology	4
Phone Shops, PC repairs, Electricals	
Entertainment	5
Betting Shops, Libraries	
	100

Foodservice and grocery on every high street

3. Who we met.

Over two days of survey data collection the teams completed 684 interviews across the eight high streets. The sample breakdown is given in Table 2, and the number of completed interviews ranges from over 100 on Borough High Street, Camberwell and Lordship Lane to just 42 on Walworth Road. The lowest response rates therefore present a risk of sample error, which may affect the interpretation of findings beyond the broadest analysis. In aggregate however the data presents a reasonably close representation of the Southwark demographic, which in any case may be biased by time of day, and day of week on any particular high street.

The findings presented relate to the population differences that characterise each of the centres surveyed, and results are compared with survey totals or averages and usually across all eight locations in order to highlight variances with potential marketing implications.

Table 2: Survey sample size by location

High Street	Sample Size
Borough High Street	103
Lordship Lane	103
Camberwell	102
Southwark Park Road	98
Peckham Rye Lane	91
Nunhead Lane	88
Herne Hill	57
Walworth Road	42
Total	**684**

Around 100 interviews completed in most locations

In Table 3 the age and gender of the respondents in each location are compared. The final column shows the proportion of each high street sample that did not continue on to further and higher education. The table has been ordered by the proportion of 18-to-24 year old respondents in the sample.

Southwark has a young population by comparison with both London and the UK as a whole, and this is reflected in the averages shown at the base of the table. Almost half the sample (48%) is aged between 18 and 34; as we did not interview respondents under 18 this bulge is very close to the estimated 52% of the adult population in Southwark aged between 20 and 39. The ONS published gender split in the population is 50.4% women to 49.6% men. The survey sample is slightly skewed, being 53% female.

The table highlights the differences between the users of the eight high streets by age, gender and educational attainment. It can be seen that:

- **Visitors to Walworth Road, Borough High Street and Peckham Rye are likely to be considerably younger than those found on Southwark Park Road, Nunhead Lane and to some extent Lordship Lane.**
- **Nunhead Lane in particular seems to be used by a significantly older population.**
- **The users of Southwark Park Road and Nunhead Lane are also somewhat more likely than average *not* to have continued with further or higher education.**

Visitors to Lordship Lane, Borough High Street and Walworth Road were also found to be more likely than expected to hold a university degree, with Borough having the highest proportion at well over two thirds.

These differences may be important for retailers and local businesses. For example, educational attainment is strongly related to household income, while younger people are sometimes considered to be more adventurous in their purchasing, as they establish routines and brand choices that may become more fixed and habitual in later life.

Table 3: High Streets by age, gender and education attained

High Street (n = 684)	18 – 24 %	25 – 34 %	35 - 44 %	45 – 54 %	55 – 64 %	65 – 74 %	75+ %	M %	F %	Comp. Edu %
Walworth Road	29	40	21	7	0	0	2	40	60	10
Borough High Street	26	39	15	12	7	2	0	43	57	10
Peckham Rye Lane	24	33	22	12	7	0	0	62	38	11
Camberwell	18	29	20	15	10	6	2	51	49	9
Herne Hill	14	35	16	18	7	9	2	44	56	9
Southwark Pk Road	13	19	31	17	6	7	6	45	55	36
Lordship Lane	10	28	27	21	7	7	0	43	57	9
Nunhead Lane	7	17	34	17	14	7	5	44	56	17
Average	**18**	**30**	**23**	**15**	**7**	**5**	**2**	**47**	**53**	14

Clear differences in ages and educational attainment between visitors at each location

Table 4 describing marital status, gives a further validation of the total sample. The greatest number of survey respondents were either single, or living with a partner (52%), which compares closely with the Southwark census data of 55%.[1]

Table 4: Marital status of the sample

Marital Status	%
Single	40
Married	36
Living with partner	12
Divorced or dissolved	6
Prefer not to say	3
Civil Partnership	2
Widowed	2

1 http://casouthwark.org.uk/sites/default/files/images/Southwark%20demography%20from%202011%20Census.pdf

Although we found a slightly higher than expected number of respondents married or in civil partnerships (38% against 30%) and slightly fewer divorced or separated people (6% against 12%), these proportions were also not particularly out of line with council data.

Table 5 therefore compares the visitors to each high street on these characteristics in order to identify distinguishing features of each location, and once again some differences can be seen.

Table 5: Marital status and household size by high street

	Single	Married	Civil Part/ship	Living with partner	Divorced	Widowed	Separated	*Children <13:* 1	2+
	%	%	%	%	%	%	%	%	%
Peckham	**52**	32	1	7	3	0	4	**17**	3
Camberwell	**49**	22	2	14	5	1	3	7	1
Walworth Road	**45**	24	0	21	0	2	0	**36**	**19**
Borough	44	31	2	17	2	2	1	6	**12**
Southwark P Rd	42	41	0	6	5	4	1	9	8
Herne Hill	40	**39**	0	12	5	0	2	14	5
Lordship Lane	31	**46**	6	7	5	1	1	7	**14**
Nunhead Lane	23	**50**	2	15	3	2	2	11	8
Average	**41**	**35**	**2**	**12**	**4**	**2**	**2**	**13**	**9**

Clear differences in the typical household structure found on each high street

The table is ordered by the number of single people in the sample at each centre, and it can be seen that:

- **Visitors to Peckham, Camberwell, and Walworth Road are more likely to be single.**
- **Peckham shoppers are quite likely to have one child under 13 in a household.**
- **Visitors to Walworth Road, Lordship Lane and Borough are more likely to be from larger families, with two children under 13.**
- **But in Camberwell the average shopper is likely to be younger, single and to have no children.**

Across the borough we found that 50% of households contain two people, 21% hold three or more and 28% just one. These differences are likely to have an impact on the range of goods bought in any location, and on the disposable incomes of households, which in turn might affect the average spend on any high street. A further variable that greatly influences disposable income is the occupation of the respondent, and Table 6 presents the range found across the data. The banding has ben condensed into four categories to simplify the analysis.

Across the borough, the majority of respondents (41%) were found to be in an administrative, caring, sales or service occupation; a further third held managerial or professional roles; and around a quarter were not currently working. This last compares with the 2012 Southwark census data of 30% not in employment [2], and the variance might be due to gradual improvements in the economic conditions or perhaps the nature of the sample, which does not contain any 16 to 18 year olds.

Table 6: Occupations of survey respondents by high street

	Caring, Customer Service, Sales, Admin, Trades	Professional Managerial Technical	Not Currently Working	Process, Plant & Machine Ops, Elementary
	%	%	%	%
Nunhead Lane	22	50	25	3
Lordship Lane	28	49	24	0
Herne Hill	37	44	12	7
Borough	48	38	10	5
Camberwell	33	38	27	3
Peckham Rye Lane	53	21	25	1
Walworth Road	57	17	21	5
Southwark Park Road	49	13	36	1
Average	41	34	23	4

Occupation reveals the borough's social diversity across its high streets

In any event, the findings once again show a very marked social diversity in the populations on each high street:

- **Herne Hill and Borough High Street have few visitors without work, while Southwark Park Road has a very high level - 50% more than expected.**
- **Nunhead Lane, Herne Hill and Lordship Lane attract above average numbers of more affluent shoppers.**
- **Visitors to Borough, Peckham, Walworth Road & Southwark Park Road are more likely than average to hold administrative, clerical, service or caring positions which are less well paid and/ often depend on flexible or zero-hour contracts.**

[2] Employment & Unemployment in Southwark. Available at: http://moderngov.southwark.gov.uk/documents/s28713/

The level of disposable income available locally is bound to affect the level of spend on each high street and consequently the range, quality and style of the goods and services on offer. These effects are explored in the consumer behaviour section later in the report.

Apart from occupation and household structure, high streets were also found to differ markedly in the ethnic diversity of their visitors. The ethnicities of the respondents are compared with the Southwark census data in Table 7, from which it can be seen that the rich diversity of the total population was captured quite well, at least along broader categorisations.

Table 7: Ethnic make up of sample compared with census (2011)

	Survey Average		Southwark (2011)
	%	%	%
White British	45		
White Irish	5		
Any other White background	11		
Total White:		61	54
Caribbean	7		
African	11		
Any other black background	1		
Total Black:		19	26
Indian	2		
Pakistani	1		
Bangladeshi	1		
Chinese	2		
Any other Asian background	2		
Total Asian:		8	10
White and Black Caribbean	4		
White and Black African	2		
White and Asian	1		
Any other mixed background	3		
Total Mixed:		10	6
Other response	2	2	3

The survey over reported White (61% against 54%) and Mixed (10% against 6%) ethnicities, and under reported Black African and Black Caribbean groups (19% against 26%). To some extent these differences might be explained by the sample sizes recruited in different locations, or indeed in the mix of locations. However, at the broader level of categorisation there are once more some very marked differences now observable between locations.

Table 8 compares the broadest ethnic make up of the respondents on each high street with the Southwark census data, and with the survey averages.

Table 8: Observed ethnicity by high street

	White %	Black %	Asian %	Mixed %	Other %
Southwark (2011)	54	26	10	6	3
Nunhead Lane	86	5	2	7	0
Herne Hill	84	5	5	5	0
Lordship Lane	74	10	7	10	0
Borough	73	3	10	15	0
Southwark Park Road	68	16	5	7	3
Camberwell	49	29	8	11	3
Walworth Road	36	31	19	12	2
Peckham Rye Lane	25	56	8	9	2
Average	61	19	8	9	1

Some extreme differences in diversity across the high streets

The table shows that:

- **Shopper ethnicity on Peckham Rye, Camberwell and Walworth Road is skewed towards Black and Mixed ethnicities – and most markedly in Peckham.**
- **Ethnicities observed in the other centres are strongly or very strongly skewed towards broadly White categories, especially in Nunhead and Herne Hill.**
- **Walworth Road has the most even distribution of the broad ethnicities.**

The fact that the number of respondents interviewed on Walworth Road is low may well have led to some sample error, and the possibility that the ethnic diversity is not well represented in this group. In particular the proportion of Asian respondents seems to be surprisingly high at over double the level seen in both the council average and the census data.

Finally, we asked the respondents on each high street about the ways in which they occupied their homes. The sample was once again shown to be reasonably representative in aggregate. Compared with council statistics[3] we found 31% to be home-owners, compared with 29% in the census, and 52% to be in rented accommodation (against 68% in the census). The disparity in renting respondents may in part be due to a large number of non-responses (7%) a high number claiming to live rent free (5%), and 6% in Housing Association or shared ownership.

[3] http://casouthwark.org.uk/sites/default/files/images/Southwark%20demography%20from%202011%20Census.pdf

Table 9: In which of these ways do you occupy your home?

	Rent	Own it outright or with a mortgage	Shared ownership or Housing Association	Live there rent free	Other/ No response
Camberwell	**70**	24	0	1	5
Peckham Rye Lane	**63**	14	**14**	5	4
Borough High Street	**58**	28	3	5	6
Southwark Park Road	53	17	**20**	2	7
Lordship Lane	46	**44**	2	3	6
Walworth Road	45	22	2	**14**	**16**
Herne Hill	44	**44**	7	4	2
Nunhead Lane	35	**54**	2	2	6
Average	**52**	**31**	**6**	**5**	**7**

Polarisation between home ownership and rental occupancies

Table 9 assesses the distribution of household occupancy against the high street where the respondents were interviewed and this reveals some clear differences between the shopper characteristics found on each.

- **Visitors to Camberwell, to Peckham Rye Lane and to Borough are more likely than expected to live in rented accommodation,**
- **Shoppers in Peckham and on Southwark Park Road are also more likely than average to be living in Housing Association properties.**
- **Shoppers in Nunhead, Lordship Lane and Herne Hill are about a third more likely than average to own their own home, and even more so in Nunhead.**
- **Walworth has a higher than expected number of respondents living rent free. It is possible that these may be students still living at home.**

3. 1. Summary of respondent characteristics by high street

A total of 684 interviews were completed across eight high streets. The responses in the dataset were first assessed in aggregate on a number of socio demographic characteristics, against fairly recently published data, mostly derived from the 2011 census. The survey respondents were found to be broadly representative of the resident population of the borough, and therefore an assessment was made of the characteristic shopper on each high street, on the basis of similarities and exceptions from the aggregate borough scores.

There are few surprises. It has been noted already that Southwark has an extremely diverse population, living and working in areas of unusually high deprivation and in the more affluent suburbs and thriving business districts bordering on the City of London and around two major hospitals.

We found that the characteristics of the shoppers on each high street were equally varied, but with some systematic biases probably accounting for the different patterns of usage and behaviour described in the next sections. To summarise:

- **Shoppers in Lordship Lane, Herne Hill and Nunhead Lane are affluent. They are more likely to be older than the borough average, and with teenage children. They are probably graduates, largely white, and likely to be home-owners with managerial or professional occupations.**

- **Shoppers on Southwark Park Road are not affluent. They are largely white, and somewhat older than the borough average, with teenage families. The are probably living in rented or housing association properties, and are very likely to have left education before further or higher levels. They are 50% more likely than average to be out of work, or to be in administrative or service occupations with unpredictable hours and income.**

- **On Borough High Street there are probably two distinct user groups. The first are working in the area, but living elsewhere. They are white, younger than average, a bit more likely to be single and a bit more likely to be living in rented accommodation. The second group is similar in characteristics but visiting the area at the weekend, also from further afield.**

- **On Peckham Rye Lane, Camberwell and Walworth Road the typical shopper is rather more likely to be younger than average, single (especially in Camberwell) and Black. In Peckham and Camberwell they are very likely to be renting a home. In Walworth Road and Peckham, respondents are likely to have one or more children under 13, whereas in Camberwell the occupation is slightly more likely to be professional or managerial, and the incidence of young children is far lower. In all three centres unemployment is running at about the borough average.**

4. Footfall Observations

The footfall observations were conducted at central areas of each high street on Tuesday and Saturday between 10.00 and 17.30. Total footfall densities varied by a factor of almost ten times between locations.

Figure 1 compares the total observed footfall over the two days. The busiest high streets, Peckham, Borough and Camberwell have foot traffic which matches or exceeds some busier West End locations, while the quieter streets at Nunhead, Herne Hill and Southwark Park Road (described in the figure as “The Blue”) are clearly a more challenging retail proposition.

Figure 1: Comparative total footfall densities on eight Southwark high streets over two days: February 2015

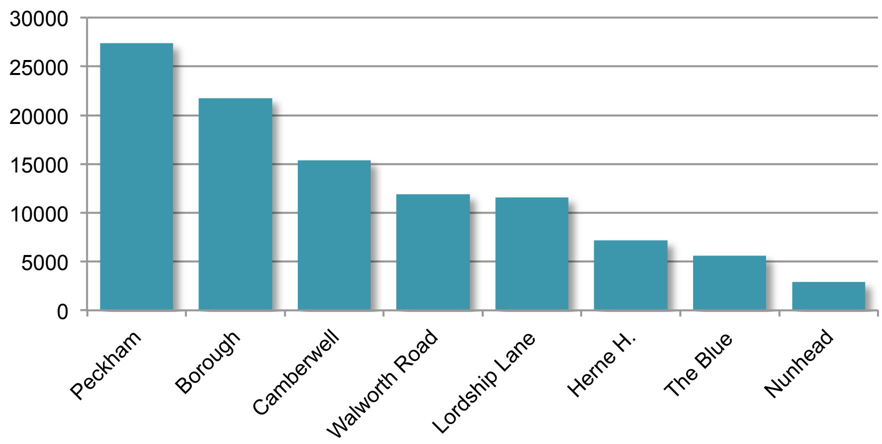


Table 10 gives a little more detail on the breakdown of footfall between days. Two patterns emerge. Across Southwark Saturday is about 1.3 times as busy as Tuesday on the high street, but with some marked variations. On Lordship Lane, Saturday is an extremely important shopping day, and the footfall is almost three times higher than the Tuesday density.

At Borough High Street, Camberwell, Southwark Park Road and to some extent Walworth Road the uplift of traffic on Saturday is almost negligible, which implies that footfalls are steady across the week in these locations.

At Peckham, Herne Hill and Nunhead there is a substantial uplift in trade between Tuesday and Saturday, making the weekend about 1.5 times busier than the weekday.

Table10: Comparative footfall densities by day on eight Southwark high streets: February 2015

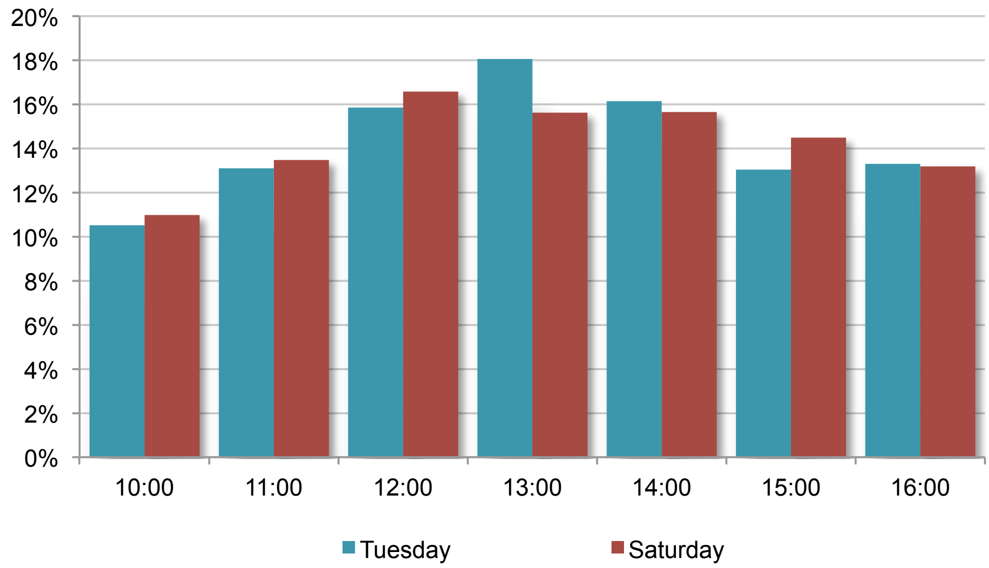
	Tuesday	Saturday	Total	Average Hour
Peckham (Rye Lane)	10778	16599	27377	1900
Borough High Street	11569	10204	21773	1600
Camberwell	7759	7637	15396	1100
Walworth Road	5527	6369	11896	850
Lordship Lane	2954	8645	11599	830
Herne Hill	2851	4330	7181	500
The Blue	2677	2945	5622	400
Nunhead Lane	1282	1648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

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

A ten-fold variation in traffic flow between locations

There is also a difference in the hourly distribution of traffic across the borough by day. The main pattern on Tuesday is a fairly pronounced peak around lunchtime as people come to the streets in search of food, drink and services of one kind or another. This distribution is shown in blue in Figure 2. On Saturdays the distribution in red takes on a different shape with a less pronounced lunchtime peak, and a more even spread across the afternoon. There are other differences between the high streets described in the individual reports, but the main pattern shows that Saturday afternoons by and large are a good continuous sales opportunity, while there is a lunchtime rush during the week that must be met or lost.

Figure 2: Distribution of hourly footfall over the day
Tuesday & Saturday



5. Consumer Behaviour

From the behavioural survey data we found more distinctive characteristics of the shoppers on each high street defined by how local they were, how long they intended to stay, how much money they intended to spend and which types of retailers and services they visited.

Broadly from these distinctive features we see three categories of high street, which the footfalls alone largely disguise.

- **Peckham Rye, Borough High Street (at least to some extent), Walworth Road and Lordship Lane appear to be destination shopping centres, in that users travel some distance to get there in order to go shopping and to visit specific outlets.**

- **On the other hand Camberwell, Herne Hill and Borough High Street (again to some extent) are visited largely because they are convenient to work or home, and often because people are passing through to somewhere else, or on a break from work.**
- **Southwark Park Road and Nunhead Lane are local shopping centres – people visit them to go shopping for both groceries and comparison goods, but as high streets they do not attract more than the most local visitors.**

There are opportunities to increase trade by recognising all three types of behaviour on the high street in order to attract more passing consumers to individual stores more often. Having identified these behaviours there may also be the potential for business communities to work together to attract more footfall to each high street. The next section presents the differences between behaviours in more detail.

5.1 Catchment, travel time and travel mode

The first analysis presents catchment data for each high street – that is the areas from which respondents had travelled that day. The question asked for the full home postcode and on that basis non-response was unfortunately quite high; fuller data was gathered with a greater than 90% response on the basis of the first part of the postcode, and so the analysis lacks finer detail but the broader picture is still clear to see.

Table 11: Catchment by High Street

High Street & Top 3 Postcodes named	% living in top 3 codes	Total Codes Reported
Nunhead Lane SE15, SE14, GU8	**97**	5
Herne Hill SE24, SE21, SW16	**76**	14
Camberwell SE5, SE22, SE17	**69**	21
Southwark Park Rd SE16, SE1, SE15	**67**	23
Peckham Rye SE15, SE5, SE13	**62**	18
Walworth Rd SE17, SE1, E16	**60**	17
Lordship Lane SE22, SE15, SE12	**57**	31
Borough High Street SE1, E2, SE10	**36**	46
Average	**66**	**22**

Two thirds of visitors travel from just three local postcodes

In Table 11 the total number of postcodes collected is presented in the right hand column. This gives some indication of the size of the catchment for each high street, and it ranges from just five codes in Nunhead to nearly fifty in Borough High Street. The average high street draws from 22 postcodes, but two thirds of the visitors normally travelled from just three codes. Again this proportion varied from the most local catchment at Nunhead Lane (three codes accounting for 97% of visitors) to the broadest at Borough (the top three codes accounting for just a third of visitors).

For most high streets the catchment is very local. Nunhead, Herne Hill and Camberwell draw from a very concentrated group of locations. The Borough High Street catchment reflects the fact that many travel to work there, or to make an infrequent but special shopping occasion. Lordship Lane also draws more widely than expected. Walworth Road too appears to be somewhat of a shopping destination rather than a convenience stop.

The dispersion of the catchment therefore contributes to an understanding of the likely needs and wants of the high street visitors, and the categorisation of the eight centres. A marketing approach for the business community might emerge from this insight if it highlights the likely purpose, spend and/or the duration of the visit.

With such local catchments, on the whole visits to the Southwark high streets are sustainable: around half of the people we met had come on foot, and a further quarter had come by bus or by bicycle. Just 11% came by car, and they were mostly visiting two centres, Lordship Lane and Walworth Road (Table 12).

The highly local nature of the catchment for Nunhead, Camberwell and Herne Hill is reflected in the fact that above average numbers come to these high streets on foot – the location is convenient, a fact which is also true for Southwark Park Road.

Table 12: What was your main form of transport to get here today?

	Walk %	Bus %	Car %	Cycle %	Train %	Tube %	Taxi %	Other %
Nunhead Lane	**80**	6	9	3	2	0	0	0
Camberwell	**62**	**30**	1	4	1	1	0	1
Herne Hill	**60**	14	9	**11**	7	0	0	0
Southwark Park Road	**54**	19	6	1	9	7	3	0
Peckham Rye Lane	37	**44**	8	3	7	1	0	0
Lordship Lane	37	**31**	**22**	7	1	0	2	0
Borough	30	14	3	8	**16**	**27**	3	0
Walworth Road	26	21	**31**	**12**	7	2	0	0
Average	**48**	**22**	**11**	**6**	**6**	**5**	**1**	**0**

Almost half travel on foot; another quarter use the bus

Borough High Street is exceptional though because unlike the other centres it has good tube and train access and draws a very wide catchment in this way, with many high street visitors working nearby but living far afield.

Camberwell and Peckham Rye are both hubs for the local bus networks across South London, and with Lordship Lane they attract more than the average number of visitors in this way. Herne Hill appears to be popular with cyclists possibly due to the amenities of Brockwell Park.

Table 13: Travel time to this high street

	% of visitors who:			% of visitors who travelled for:			
	Live	Work	Both	Less than 30 minutes	30 min to 1 Hour	1 to 2 Hours	Over 2 hours
	%	%	%	%	%	%	%
Nunhead Lane	**84**	**9**	5	**93**	**5**	1	1
Camberwell	**63**	12	15	**84**	**16**	0	0
Southwark Park Road	52	**18**	14	**80**	**19**	1	0
Herne Hill	61	2	14	75	25	0	0
Lordship Lane	51	**22**	17	75	19	6	0
Peckham Rye Lane	56	11	21	70	27	1	1
Walworth Road	29	10	36	**62**	**31**	**7**	0
Borough	**22**	**27**	17	**55**	**35**	**8**	2
Average	**52**	**14**	**17**	**74**	**22**	**3**	**1**

Three quarters of visitors to any high street spend less than half an hour *en route*

From Table 13 we can see that most visitors on any high street have spent little time in getting there, usually less than 30 minutes. This is an important finding – it highlights the convenience of a location for many, in itself a draw for footfall. Exceptions to this rule are, as noted, Borough High Street, which draws from further away, and Walworth Road, which appears to be somewhat similar in this regard. It is clear to see that Borough has far fewer than average numbers living nearby, or working nearby. Large numbers of visitors come to visit the market and other cultural attractions nearby, accounting for this.

A further noteworthy bias is the higher than expected working population near Southwark Park Road and Lordship Lane, an opportunity to attract local lunchtime weekday trade.

5.2 Visit frequency, dwell time and average spend

A particular feature of the visitors' behaviour is the frequency of visits made to each high street, the short space of time taken on each visit and the low average spend. Although these numbers fluctuate and reveal some important differences between centres, by and large shopping on Southwark's high streets appears to be a case of little and often. The important point here is that this is now a characteristic of most high street shopping in the UK, and recognising this form of behaviour is opening doors to successful shopper marketing approaches.

Table 14: Visit frequency by high street

High Street	Most days	Three times a week	Once a week	At least once a month	Less Frequently	This is your first visit
	%	%	%	%	%	%
Peckham Rye Lane	**63**	**10**	10	4	12	1
Camberwell	**48**	**23**	10	6	9	5
Southwark Park Road	**46**	**29**	6	1	14	4
Lordship Lane	38	20	**24**	5	5	8
Nunhead Lane	35	**31**	**24**	7	3	0
Borough	31	13	17	**13**	**16**	**12**
Herne Hill	28	14	16	**12**	**16**	**14**
Walworth Road	26	17	12	**19**	**19**	7
Average	**39**	**19**	**15**	**8**	**12**	**6**

75% visit at least once a week and 40% visit most days

Table 14 is ordered by the frequency of visits in each location. Peckham, Camberwell and Southwark Park Road appear to have the most frequent visitors, Lordship Lane and Nunhead Lane rather fewer, and Borough, Herne Hill and Walworth Road the lowest frequencies. A pattern may be emerging from these three groupings: Borough and Walworth appear to be drawing some of their visitors rather more infrequently but for a particular reason. At the other end of the spectrum, Camberwell and Peckham may be drawing shoppers just because they are convenient and local, and perhaps Lordship Lane and Nunhead can attract slightly more regular visits for a routine shopping trip. The dwell time will reflect this picture, and so in Table 15 the respondents' intended length of visit at each location is shown.

As previously noted, dwell times are short. On most high streets 70% of visitors intend to spend less than one hour; about a fifth will stay for fifteen minutes, around a quarter for half an hour and the rest anywhere between thirty and sixty minutes. Table 16 then shows the variances from this broad pattern.

Nunhead Lane, Herne Hill and Southwark Park Road are the most likely to see exceptionally short trips. Camberwell and Lordship Lane hold visitors for slightly longer – rather more visitors than expected stay there for over fifteen minutes and up to an hour. Walworth Road, Peckham Rye and Borough High Street seem to be different in having rather more visitors than expected staying for longer, particularly Borough and Peckham. In other words there must be enough in those locations to justify a long trip, thus suggesting these locations are destination centres, rather than a convenient amenity to pass through.

Table 15: Intended dwell time by high street

	Up to 15 minutes %	15 – 30 minutes %	30 minutes – 1 hour %	1 – 2 hours %	2 – 3 hours %	3 – 4 hours %	More than 4 hours %
Nunhead Lane	**41**	**38**	14	2	1	0	5
Herne Hill	**33**	**30**	11	19	0	4	4
Southwark Park Road	**31**	**22**	**33**	7	3	0	4
Camberwell	18	**30**	**25**	16	8	0	3
Borough	17	17	24	17	6	4	**16**
Peckham Rye Lane	14	18	15	**27**	5	1	**19**
Walworth Road	12	21	17	**31**	10	5	5
Lordship Lane	12	**28**	**30**	15	2	1	13
Average	22	26	21	17	4	2	8

Dwell times are low – almost half spend under 30 minutes, two-thirds up to an hour

So how much money gets spent in so little time? The answer is not very much by and large. Table 16 gives the detail for the average high street: about a third will spend less than £10 per trip, another third between £10 and £20. Even on the longer staying high streets at Peckham, Walworth Road and Borough, the spend is largely between £20 and £40, with some outliers spending up to £70. Clearly shopping here is different, but there are still a large number of little and often purchasers in Walworth and Borough as well.

Table 16: Average Spend
"By the time you leave here today, how much do you expect to spend?"

	Less than £10	£10 - £20	£20 - £30	£30 - £40	£40 - £50	£50 - £70	More than £70
	%	%	%	%	%	%	%
Southwark Park Road	56	29	9	1	1	3	0
Herne Hill	43	30	7	5	7	4	4
Nunhead Lane	31	35	22	5	6	0	1
Borough	29	29	22	11	4	2	3
Camberwell	27	42	14	10	4	3	0
Peckham Rye Lane	26	25	21	14	5	5	5
Lordship Lane	22	29	15	12	12	3	6
Walworth Road	18	10	20	20	20	10	3
Average	32	29	16	10	7	4	3

One third spend less than £10 per visit, and two thirds less than £20

5.3 Purpose of visit

We asked people what the primary purpose of their visit was, and then collected responses about their secondary purpose. In that way we saw that trips were often combined, for example lunch and passing through, or main grocery shopping and banking. On some high streets shopping was most often a secondary purpose for many, for example in Camberwell, while on other high streets the main grocery shop and topping up in specialists covered both responses. In Table 17 the summary can be seen.

Table 17: What is the main (secondary) purpose of your visit here today?

	Shopping	Eating, Drinking, Leisure	Travelling through	Fitness, Health, Finance	Other
	%	%	%	%	%
Nunhead Lane	100	35	39	2	3
Peckham Rye Lane	90	30	51	6	23
Walworth Road	83	60	36	14	7
Lordship Lane	72	57	50	17	5
Camberwell	72	60	32	25	10
Southwark Park Road	70	44	55	18	14
Herne Hill	68	60	44	5	24
Borough	44	76	51	20	10
Average	75	53	46	14	12

Shopping the most common response, but about half are just passing through

The stated intended purpose of the visit gives us in aggregate a very clear idea of the different characteristics of each high street based on the uses to which its visitors put it. For marketers of retail businesses this analysis gives clear and useful insight at the community level, and at the individual store level about how to drive footfall, and then attract and convert it more effectively.

Visitors to Nunhead Lane, Peckham and Walworth Road are there to visit stores and go shopping. Responses on these high streets were well beyond the average for these activities, but visitors to Herne Hill and to Borough were more concerned with eating, drinking and other leisure activities. This was also true of Camberwell to some extent, but here an unexpectedly large number intended to visit a bank, building society or post office as well.

In Herne Hill the “other” category captures the large numbers of people travelling to or from the park to run walk cycle or take part in some other leisure activity, while in Peckham the response is rather unexplained.

It is also clear that the trip to the high street is being combined with travel to or from some other destination. Almost half the visitors answered that they wee just passing through to one or other of the questions. The proportion is highest in Southwark Park Road (55%), Borough and Peckham Rye (both 51%) and Lordship Lane (50%). Borough and Peckham are major transportation hubs so if this drives footfall the opportunity is clear. Lordship Lane and Southwark Park Road are substantially quieter high streets.

Intention and behaviour are not always completely aligned, and so we asked people where they had visited or spent money today. The answers to this question are given in detail in Table 18, for interest, and then summarised in Table 19 for comparison and discussion.

From the table we can see that:

- **Camberwell, Nunhead Lane and Lordship Lane are being used for grocery shopping (main and top-up) rather more heavily than expected. This is not their only use, but there is a propensity to treat these three high streets for this purpose.**
- **People on Lordship Lane, Walworth Road, Borough High Street and Camberwell are using the financial services more heavily than average.**
- **Herne Hill, Walworth Road and Southwark Park Road are being used for comparison goods shopping and for services such as hairdressing and shoe repairs; on Walworth Road there is particularly high usage of phone shops, takeaways and betting shops.**
- **Borough High Street is a food and drink destination – both during the week and at weekends, and like Camberwell and Herne Hill it attracts more than the usual proportion of customers to the coffee shops there.**

The findings in Table 19 therefore largely support the descriptions of the different high streets gathered from the intention data, and therefore confirm and enhance insight about the characteristics of each location, except at Peckham Rye where few responses were given, so that the distribution shows a high street being used mostly for grocery and comparison goods shopping, but all scores are below average

Table 18: A detailed view of the shops and services visited by high street

	N/head Lane	L/ship Lane	Ca/well	H/ne Hill	W/orth Road	S/ark Park Road	P/am Rye Lane	Boro	
	%	%	%	%	%	%	%	%	%
Grocery									
Main Grocery	*48*	*61*	*55*	*39*	*40*	*50*	*47*	*22*	***46***
Top Up Grocery	*38*	*21*	*22*	*21*	*24*	*10*	*11*	*17*	***20***
Bakery/Fishmonger..	*32*	*5*	*5*	*18*	*2*	*3*	*2*	*16*	***10***
	100	**87**	**81**	**77**	**67**	**63**	**60**	**55**	**76**
Services									
Health	*7*	*12*	*7*	*9*	*7*	*7*	*7*	*8*	***8***
Estate Agents	*1*	*1*	*1*	*0*	*2*	*2*	*0*	*3*	***1***
Personal Care/Pharmacy	*18*	*15*	*9*	*9*	*21*	*6*	*2*	*8*	***10***
Gym	*1*	*2*	*4*	*5*	*14*	*2*	*2*	*7*	***4***
Library	*6*	*4*	*2*	*7*	*2*	*3*	*1*	*4*	***4***
Dry Cleaner	*3*	*2*	*0*	*0*	*5*	*6*	*0*	*3*	***2***
Hair Dresser	*1*	*1*	*2*	*5*	*2*	*0*	*0*	*2*	***1***
Childcare	*1*	*1*	*0*	*0*	*0*	*1*	*0*	*4*	***1***
Garage	*0*	*0*	*0*	*2*	*0*	*0*	*0*	*1*	***0***
	39	**37**	**25**	**37**	**55**	**28**	**12**	**39**	**32**
Comparison Goods									
Clothing & Footwear	3	8	3	2	12	11	14	4	**7**
Charity Shops	1	8	6	9	0	6	1	7	**5**
Home Improvement	8	3	4	7	5	9	0	1	**4**
Accessories	0	10	0	0	2	3	0	3	**2**
Electricals	0	3	3	2	7	4	5	3	**3**
Sporting Goods	1	2	0	5	12	3	2	0	**2**
Furniture/Homeware	1	1	1	2	7	3	0	3	**2**
Toys & Games	1	2	1	5	7	1	0	1	**2**
Petrol	1	5	2	2	0	1	0	1	**2**
Jewellery	0	1	0	0	0	4	0	1	**1**
	17	**42**	**20**	**33**	**52**	**46**	**23**	**23**	**31**
Coffee Shop	**18**	**24**	**25**	**28**	**10**	**5**	**5**	**51**	**22**
Financial Services									
Banking/Financial	*1*	*15*	*13*	*2*	*12*	*8*	*0*	*16*	***9***
Post Office	*3*	*14*	*13*	*7*	*17*	*3*	*2*	*9*	***8***
	5	**28**	**25**	**9**	**29**	**11**	**2**	**24**	**17**
Other Foodservice									
Restaurants	*2*	*10*	*9*	*7*	*19*	*3*	*4*	*21*	***9***
Bars & Clubs	*1*	*3*	*0*	*4*	*5*	*3*	*1*	*10*	***3***
	3	**13**	**9**	**11**	**24**	**6**	**5**	**31**	**12**
Take Away	**6**	**9**	**8**	**4**	**17**	**7**	**4**	**6**	**7**
Leisure									
Entertainment	*0*	*1*	*0*	*2*	*14*	*0*	*3*	*3*	***2***
Betting Shops	*3*	*0*	*0*	*0*	*0*	*8*	*0*	*3*	***2***
	3	**1**	**0**	**2**	**14**	**8**	**3**	**6**	**4**
Technology									
Electronics	1	0	1	2	12	0	0	1	**1**
Mobile Phones	*0*	*0*	*2*	*0*	*7*	*2*	*2*	*0*	***1***
	1	**0**	**3**	**2**	**19**	**2**	**2**	**1**	**3**

Table 19: Summary. Which of these have you visited or spent money in today….

	Grocery	Services	Compar-ison Goods	Coffee Shop	Finan/l Services	Other Food-service	Take Away	Leisure	Technology
N/head Lane	**100**	39	17	18	5	3	6	3	1
L/ship Lane	**87**	37	42	24	**28**	13	9	1	0
Ca/well	**81**	25	20	**25**	**25**	9	8	0	3
H/ne Hill	77	**37**	**33**	**28**	9	11	4	2	2
W/orth Road	67	**55**	**52**	10	**29**	**24**	**17**	**14**	**19**
S/ark Park Road	63	28	**46**	5	11	6	7	8	2
P/am Rye Lane	60	12	23	5	2	5	4	3	2
Borough High St	55	39	23	**51**	**24**	**31**	6	6	1
	76	**32**	**31**	**22**	**17**	**12**	**7**	**4**	**3**

5.4 Competition for footfall: duplication of shopping destinations

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, a particular retailer or service, or for a range of comparison goods categories and brands. Walworth Road, Borough High Street and Rye Lane each fit this category - a destination for comparison goods shopping. Each is however also serving as a convenient and frequent destination for top-up and distress purchases for some of the visitors there.

As destination centres they are competing with bigger retail locations beyond the borough, which offer less convenience but more choice, and as retail centres the business community marketing strategy must reflect the fact that the battle for footfall is drawing from a wider catchment than other Southwark high streets, but it must pull those consumers away from larger competing centres often with more choice and bigger brands. The struggle is to attract more people back more often by giving them, as far as possible, every reason to return, and no reason not to. Traditional marketing thinking suggests a positioning strategy – being known by many people for being excellent on one simple motivating attribute and consistently delivering on it. Although this won’t stop shoppers in Peckham also visiting Brixton occasionally, it will keep Peckham Rye top of mind and may encourage more people to come back a little more often.

The consumer behaviour identified also shows that there are high streets which are being used *“because they are there”.* Typically, these shoppers are extremely local (either living or working nearby), visit frequently and spend very little. In this category many are passing through, topping up at convenience stores, buying snacks or visiting banks. Probably they do not choose to be there – they go there because it is convenient.

These locations include Camberwell, Herne Hill and Southwark Park Road and Borough High Street for some shoppers there. More comparison goods shopping is available elsewhere, and so these shoppers also visit other locations.

Table 20 indicates the retail locations with which the Southwark high streets are competing most intensely – where else our respondents visit for shopping. The list is different on each of the eight locations, but in aggregate it gives a sense of what may be missing from the borough.

The top two locations account for almost a third of ***all*** the alternatives named. The first is not surprising – the West End (17%) is easily accessible from Southwark and is London's shopping street. The second is more surprising. Peckham is the first alternative for 12% of the sample indicating how strongly it draws from across the borough. In fact four of the top ten alternatives are local.

After the top five locations named, the number of respondents identifying any other location declines rapidly. The total list of competing alternatives reaches 477, yet over half the switching is accounted for in just five 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. The table implies that Rye Lane, Elephant & Castle and Walworth Road are competing on a different basis than more local high streets, as noted and they must attract more visitors from the bigger centres. This may involve improving the retail mix and general offer.

Table 20: Top ten alternative destinations

(n = 684)	Total	%
West End	114	**17**
Peckham	79	**12**
Brixton	51	**7**
Lewisham	44	**6**
Westfield	34	**5**
Elephant & Castle	21	**3**
Surrey Quays	21	**3**
Walworth Road	14	**2**
Bromley	12	**2**
Croydon	11	**2**
		60
(Total named alternatives = 477)		

Four of the top ten alternative shopping locations are in Southwark

5.5 Consumer Behaviour: Summary

To summarise, shoppers on any of Southwark's high streets are vey likely to appear on other high streets on different days and times and for different purposes. There are many reasons to visit any high street, and probably several reasons behind any one visit. Much of the motivation may be habitual and convenience driven, while other visits may be motivated by the search for an occasion, a particular event or retailer or simply variety seeking.

By analysing the way consumers at each location are behaving, we define three categories of high street. Of course there is a mix of different types of user on every high street but these definitions emerged because an unexpectedly large proportion are behaving in a particular way at a particular centre.

- **Peckham Rye, Borough High Street (at least to some extent), Walworth Road and Lordship Lane appear to be destination shopping centres, in that users travel some distance to get there in order to go shopping and to visit specific outlets.**

- **On the other hand Camberwell, Herne Hill and Borough High Street (again to some extent) are visited largely because they are convenient to work or home, and often because people are passing through to somewhere else, or on a break from work.**

- **Southwark Park Road and Nunhead Lane are local shopping centres – people visit them to go shopping for both groceries and comparison goods, but as high streets they do not attract more than the most local visitors.**

There are opportunities to increase trade by recognising all three types of behaviour on the high street in order to attract more passing consumers to individual stores more often. Having identified these behaviours there may also be the potential for business communities to work together to attract more footfall to each high street.

The next section goes a little further by assessing and comparing the visitors' attitudes towards each high street at each location.

6. Attitudes to the high street

The first question to assess motivation was to ask respondents what most attracted them to that particular high street. The distinctions already presented are further supported here in Table 21. Camberwell, Herne Hill and Southwark Park Road are favoured most for their convenience; Lordship Lane, Peckham Rye and Nunhead Lane attract visitors because of the range of shops; Borough High Street attracts visitors for its food, drink and its market. The table shows the responses across the attributes, but the responses are biased in favour of particular features.

Table 21: What most attracts you to this high street?

	Proximity or conven-ience %	Range of shops %	Range of places to eat or drink %	Attractive environ-ment %	Specific retailer /service %	Ease of Parking %	Other %
Southwark Park Rd	**60**	7	3	10	3	1	**15**
Herne Hill	**60**	7	4	9	2	0	**19**
Camberwell	**59**	18	8	0	6	0	10
Peckham Rye	47	**32**	3	8	2	1	7
Nunhead Lane	47	**36**	6	1	5	1	5
Lordship Lane	38	**34**	11	7	0	**5**	6
Walworth Road	33	19	**26**	12	2	**5**	2
Borough	33	13	**17**	9	**12**	2	**15**
Average	**47**	**21**	**10**	**7**	**4**	**2**	**10**

Clear distinctions between the eight high streets

We then asked what, if anything, respondents would like to see improved at that location. The question was open ended, and so the results presented in Table 22 are ordered by size, but represent only the most commonly expressed opinions.

Unlike the preceding table this one represents the total counts rather than percentages.

The most frequent and consistent response to this question by far was *"A wider range of shops"*. It was given by almost a third of the responses in relation to all eight high streets.

From the table it can be seen that:

- **The response was expressed most strongly in Camberwell, Lordship Lane and Southwark Park Road (around 40% in each location) and rather less strongly in Nunhead Lane, Peckham Rye and Walworth Road.**
- **The next most frequent request, a free ATM, received just a sixth of the responses, and almost entirely in relation to Nunhead Lane.**

- **The third most commonly expressed response, but a similar weight, was in relation to the need for a wider variety of restaurants. These comments also mostly related to Nunhead Lane with a few applying to Peckham Rye.**
- **Other comments were even more local – a safer crossing in Camberwell, more bars in Borough High Street, easier parking in Lordship Lane, and a few requests for more green space in Borough and in Camberwell.**

The local and particular comments can be responded to fairly easily at that level, but the fact that a third of shoppers are dissatisfied with the retail offer on the high street is telling, and it indicates a need for variety that can be met easily elsewhere. In other words, it may be taking precious footfall out of the borough, perhaps needlessly.

Table 22: "What if anything would you like to see improved?"

	Boro	Camb/ well	Herne Hill	Lords/ Lane	N/hd Lane	Peck/ Rye	S/wk P.Rd	W/rth Road	Total Count
Respondents	103	102	57	103	88	91	98	42	684
A Wider Range of Stores	32	42	16	38	9	23	42	12	214
Bank/ATM	0	0	7	0	39	0	0	1	47
Variety of Restaurants	6	1	3	3	15	7	0	4	39
Cafes	2	3	2	0	2	4	11	2	26
Leisure Activities	6	2	1	1	1	1	5	6	23
Transport & Public Realm	3	10	2	0	4	2	1	0	22
Bars & Pubs	7	0	3	1	0	0	1	2	14
Parking	1	1	2	5	1	0	1	0	11
Cinema	2	2	0	4	0	0	0	2	10
Parks & Green Space	4	3	0	0	0	0	2	0	9
Social & Community	0	2	1	1	0	0	4	1	9
Gyms	3	0	0	0	1	0	1	0	5
Police Station	0	0	0	2	0	0	0	0	2

Consistently across the high streets, almost a third of respondents want more choice

7. Marketing effectiveness

In the final section of the survey we investigated the effectiveness of local communication channels in the borough, the uptake of local community events and the use of common marketing vehicles such as coupons, and apps. On the whole, given the low cost and high interest in digital media it turned out that in fact the most effective way to reach local consumers was through traditional channels, and in particular the local press. The largest reach is for TV, but leaving this aside as unaffordable for all but national brands, the next largest is online

(15%). This includes various social media channels as well as specific named local bulletin boards, and is therefore fragmented but affordable.

Word of mouth is a strong communication medium, and this is interesting for local retailers with very local catchment of frequent consumers. Following on, over a quarter then named press media as a source of local information. This means that there is clearly affordable reach to be had if a concerted campaign could be created to drive footfall on each high street.

However across the borough we found recall for advertisements featuring local events to be quite low (18%), and recall of local events attended was also low (24%) and with a strong bias towards the more affluent high streets.

The occasions that respondents did name were however a good mix of commercial events (special evenings at local pubs, cinema, other cultural events as well as retail events), and community events, such as fireworks or outdoor shows. There is probably some mileage in investment in similar occasions to create extra traffic and generate greater sales opportunities.

Table 23: Local Media Reach

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

Word of mouth and social media are important and cheap
The local press still has good reach

Finally we asked people what promotional tools they were going to use or had used today. Across the borough 32% of the sample had used or were going to take advantage of some form of promotion, but individually the reach was low: the most common were printed (7%) or social media driven discounts (7%), including email vouchers (6%). Store and service locator apps (4% each) were infrequently used, as were QR codes (2%) and voucher apps (3%).

For independent businesses the immediate solution to attracting and retaining customers is unlikely to be digital marketing, which although cost effective is also time hungry to manage.

Table 24: Promotional mix elements used today

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

Coupons still work….!

8. Conclusion

The aim of the study was to give an impression of high street vitality in the borough, and specifically to develop insights that might suggest routes to improve customer attraction & conversion to each high street and to individual retailers in each location.

Across the eight high streets we found very great differences in overall footfall densities, approaching ten times between the busiest location in Peckham and the quietest at Nunhead Lane. At their busiest Peckham, Borough and Camberwell have footfalls comparable with some well-known West End shopping streets, for example Berwick Street Market or Marylebone High Street. Footfall is a key retail metric since it is the baseline for attraction and conversion by individual retailers.

Attraction and conversion rates at individual retailers reflect baseline footfall densities and also the usage of each high street, in particular frequency of visit, dwell times and average spends. We identified three types of high street as defined by these measures:

8.1 Destination Locations

Four high streets can be defined as destination locations. They draw shoppers from a wider area, who visit less frequently but stay longer and spend more. In Southwark these are:

- Peckham Rye Lane
- Walworth Road
- Lordship Lane
- Borough High Street

It is probably true to say that shoppers are drawn particularly to visit East Street Market and Borough Market, and to the variety and quality of stores in Peckham and Lordship Lane.

Because visits to these four high streets are discretionary, they are in closer competition with a wider range of other retail locations, including the West End the Westfield shopping malls and Surrey Quays which offer a wider choice of national brands and a variety of other amenities. On the other hand each of these four high streets is also drawing frim a larger pool of available shoppers who have visited before and are prepared to travel further for a particular purpose.

8.2 Convenience Locations

Camberwell, Herne Hill and Borough High Street each have large numbers of shoppers visiting because the location is convenient to work or home. These shoppers are traveling through, on their way to or from work, or in their lunch break. They are visiting the high street *"because it is there"* rather more than *"because they like it".* They use whatever services are on offer, and shop at take-aways, cafes, and coffee shops; they visit convenience stores. Footfalls in these high streets are high or relatively high, and the shoppers visit very frequently but spend small amounts on each occasion. This type of "little and often" shopping seems to be the new face of UK high street retail, a fact which has been recognised by the major multiple grocers who are developing more efficient offers to capture greater proportions of the passing footfall in transportation hubs and busy interchanges. There is therefore increasing competition to attract and convert the existing "little & often" shopper.

8.3 Traditional & Local High Streets

Southwark Park Road and Nunhead Lane remain as traditional high streets in that they offer a range of groceries, retail services and comparison goods. They serve a very local community but do not attract visitors from a wider catchment. There may be many reasons for this – somewhat limited choice, limited accessibility and no real focus or differentiation in the retail mix. Nunhead Lane is a small retail centre, but Southwark Park Road has more outlets, and rather more choice. It is famous for The Blue, but The Blue was hardly operating during our survey. These high streets need more footfall, but they are not attracting shoppers beyond the very local community, and even these visitors can (and will) easily travel – for example to Surrey Quays, for a more exciting (and expensive) range of choices. To be more successful, both locations must either attract more visits from existing local shoppers (unlikely), or attract more footfall from beyond the very local catchment (possible, but slow).

8.4 Implications

For high street businesses, sales depend on three things; the densities of available footfall, the rate at which shoppers can be attracted into store and the rate at which those shoppers can be converted to customers. At least the first two are dependent on the strength of competition. Our categorization has different implications on these metrics.

- For Southwark's ***destination locations*** the primary competitive force is for footfall. Borough High Street, Walworth Road, Peckham Rye and Lordship Lane are competing with bigger, busier retail centres for the visitors they all draw from large catchments. In order to succeed the retail offer must reward the added effort of a longer journey, and be remembered for doing so in order to prompt a further trip perhaps a few months later. The rewards can be in the provision of attractive and wider choice, including the range of recognized brand names as seen on Lordship Lane or in Peckham. It might be in the provision of a unique service, as at Borough or East Street Markets.

- Success may follow from tapping into existing consumer behavior in order to develop a positioning. For example, a very large number of visitors to Borough High Street are there to buy food or drink, either to eat on the spot or take away. Borough is developing a reputation, a positioning, as a food centre – if that is what its visitors are looking for in all forms, then a reputation will drive footfall, and attract more visitors more often. It will also attract more varied food retailers to access the demand. As the reputation develops Borough High Street develops salience, mental availability, in the wider catchment which will prompt the idea of a visit more frequently for more people.
- For ***convenience locations*** the challenge is reversed – the footfall is often there but existing businesses may be able to catch more of it. They may soon face a greater threat from multiples such as J. Sainsbury which are currently developing compact convenience formats for busy locations such as Camberwell.
- Again, the solution may rest with the nature of the existing visitors. The attitude to these locations was found to be less than positive among many shoppers, based on the range and choice of retail stores and foodservice outlets. But based on little and often shopping, retailers have the opportunity to develop close relationships with their customers especially if they see them almost every day. The benefit of this relationship is seen in the possible improvements to efficiency which may be introduced to respond to the dramatic peaks in footfall that were identified. Time pressured shoppers see a real benefit in convenience and ease of service which independent retailers may be better placed to develop than national multiples.
- Real convenience means paying attention to better ranging of impulse and distress purchases, better store layout to drive up quick, easy impulse sales in store, and relationships to drive attraction back into the store next time. The relationships developed may also be used to drive footfall by publicizing better service in store, or exciting events in the high street as our communication data suggests.
- For the two ***local high streets*** the position is challenging. Southwark Park Road and Nunhead Lane have the lowest footfall densities in the study. They draw from a localized catchment, and their shoppers already like what they have by and large. The possibilities to increase visit frequency, or average spend therefore seem limited. More footfall is required if the locations are to grow, and this is only possible by reaching beyond the existing catchment.
- To do this successfully a real reason to visit these high streets must be established, to attract more visitors on a less frequent basis from further afield. For Southwark Park Road one obvious suggestion may be to revive The Blue.