

Evaluating Southwark's Three Cumulative Impact Zones

Joint strategic needs assessment

People & Health Intelligence Section

Southwark Public Health

20 October 2016

GATEWAY INFORMATION

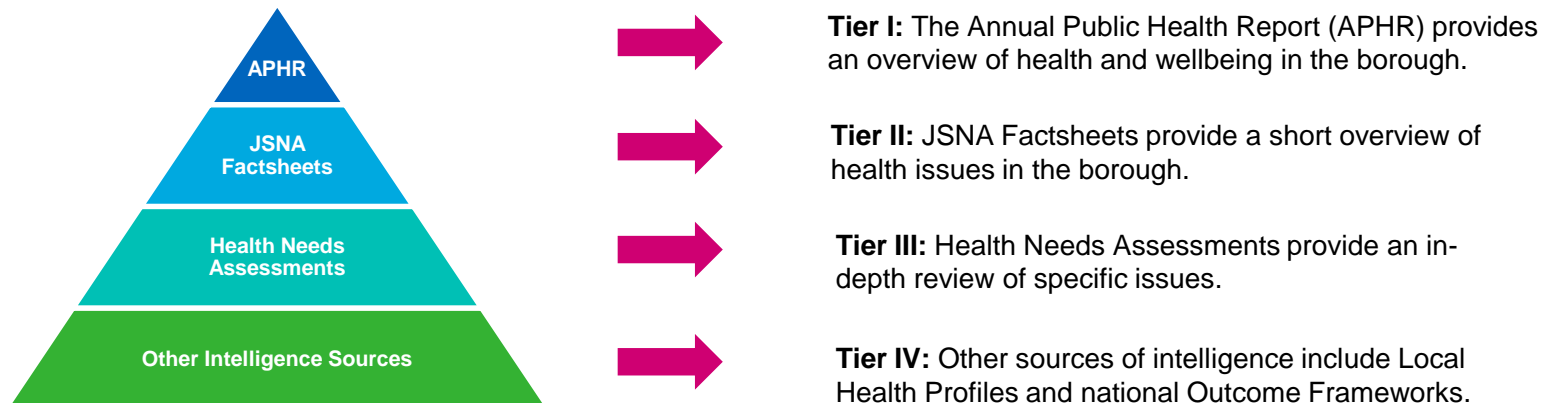
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Prepared by:	C Sharpe
Contributors:	R Pinder, D Franklin
Approved by:	K Fenton
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Contact details:	publichealth@southwark.gov.uk
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Health Needs Assessments form part of Southwark's Joint Strategic Needs Assessment process

BACKGROUND

The Joint Strategic Needs Assessment (JSNA) is the ongoing process through which we seek to identify the current and future health and wellbeing needs of our local population.

- The purpose of the JSNA is to inform and underpin the Joint Health and Wellbeing Strategy and other local plans that seek to improve the health of our residents.
- The JSNA is built from a range of resources that contribute to our understanding of need. In Southwark we have structured these resources around 4 tiers:



- This document forms part of those resources.
- All our resources are available via: www.southwark.gov.uk/JSNA

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Implications and recommendations

A significant body of scientific evidence correlates alcohol availability with alcohol related harm

BACKGROUND

National and international guidelines consistently emphasise the importance of reducing the availability of alcohol.

- Cumulative Impact Zones (CIZs) empower local licensing authorities to better control the number and type of licenced outlets as well as impose more restrictive conditions upon alcohol licences¹
- CIZs are designated geographic areas that are currently saturated by premises licensed to sell alcohol
- In 2014, there were 208 CIZs established in over 100 local authorities (LAs) across England and Wales²
- Few studies have evaluated the impact of CIZs and therefore there is little evidence as to their effectiveness

1. Home Office. Revised Guidance issued under section 182 of the Licensing Act 2003. 2015.

2. Home Office. Alcohol and late night refreshment licensing England and Wales. National Statistics. 2014

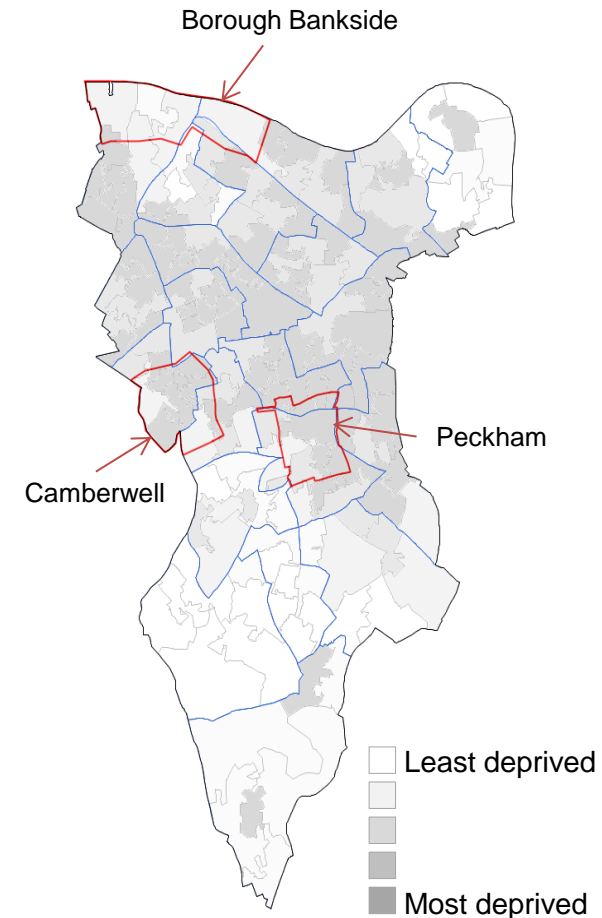
A significant body of scientific evidence correlates alcohol availability with alcohol related harm

INTRODUCTION

Southwark currently enforces three CIZs in areas considered 'saturated' by alcohol outlets: Borough Bankside, Peckham and Camberwell

- Negative consequences on local neighbourhoods include crime and disorder, public nuisance and matters of public safety
- Legislation requires that the ongoing need for established CIZs is regularly readdressed
- With Southwark's current Statement of Licensing Policy due for renewal, public health were asked by licensing to evaluate the impact of the three CIZs

Working with Imperial College London, Southwark's public health team have developed and implemented a robust scientific methodology to evaluate the impact of CIZ in the borough. **This document summarises the approach and reports on the findings, in order to inform the on-going development of cumulative impact policy nationally and locally.**



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The aim was to evaluate how three CIZs have influenced alcohol availability in Southwark

THREE QUESTIONS WERE ASKED

Q1

- Following the establishment of three CIZs in Southwark, did the number of licences decrease?

Q2

- Post CIZ, are the type of licences, such as drinking establishments, eateries, and off-sales, affected?

Q3

- After CIZ, do the number of licence applications receiving objections increase?

For questions one and two, both the number of licence applications and the number of issued licences were investigated in parallel

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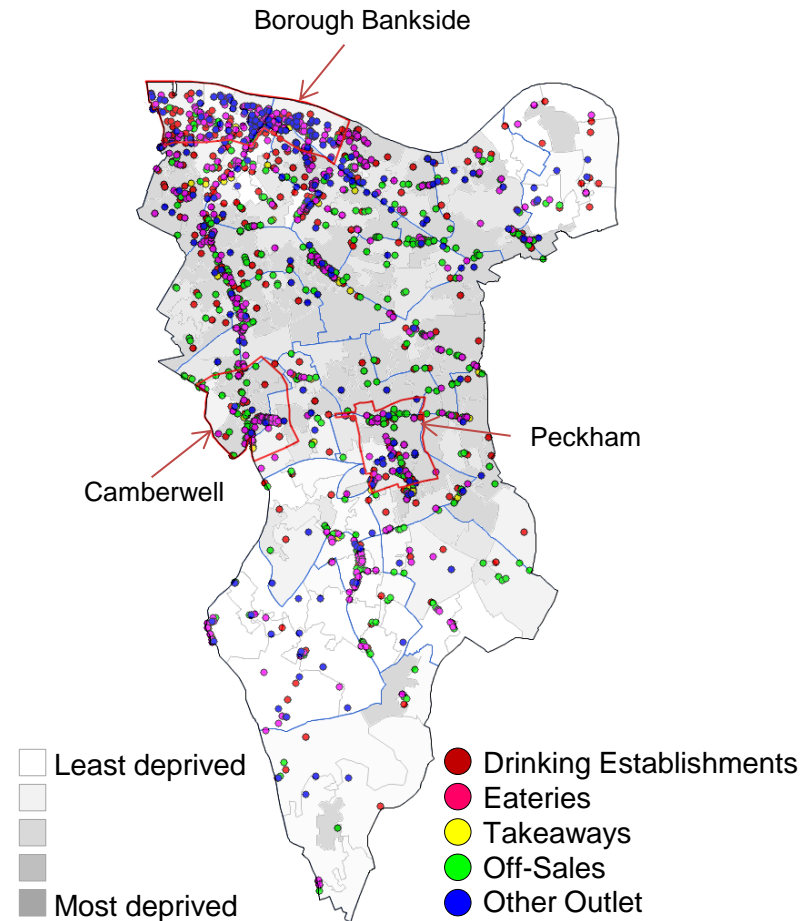
Limitations

Implications and recommendations

Borough Bankside remains the focus of licensing activity in Southwark

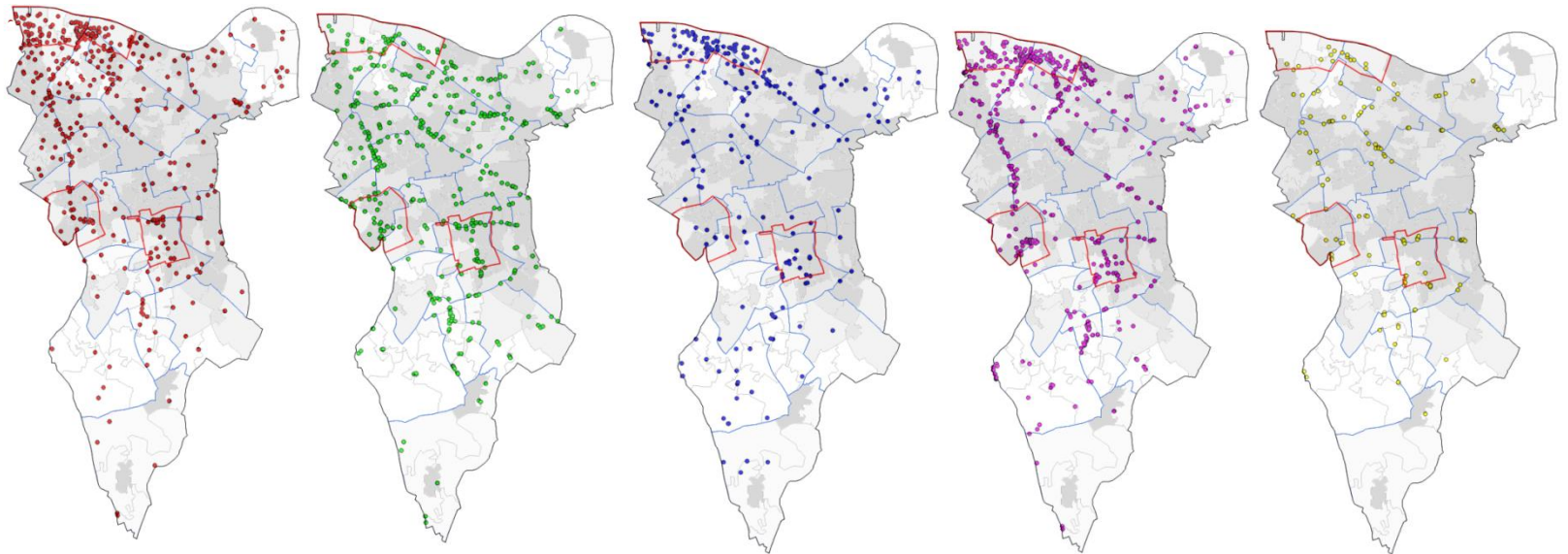
GEOGRAPHICAL ANALYSIS

- Clusters of drinking establishments are shown within each CIZ with a particularly high concentration in Borough Bankside
- Areas immediately surrounding Borough Bankside are also densely populated with licensed outlets suggesting a potential displacement effect of the CIZ
- A particularly high number of eateries and bars can be seen along the Walworth and Camberwell Road
- Takeaways and off-sales appear the most strongly associated with deprivation by visual inspection
- There are comparatively few takeaways licensed to sell alcohol across Southwark
- Eateries are the most clustered outlet type and are densely sited within the three CIZs



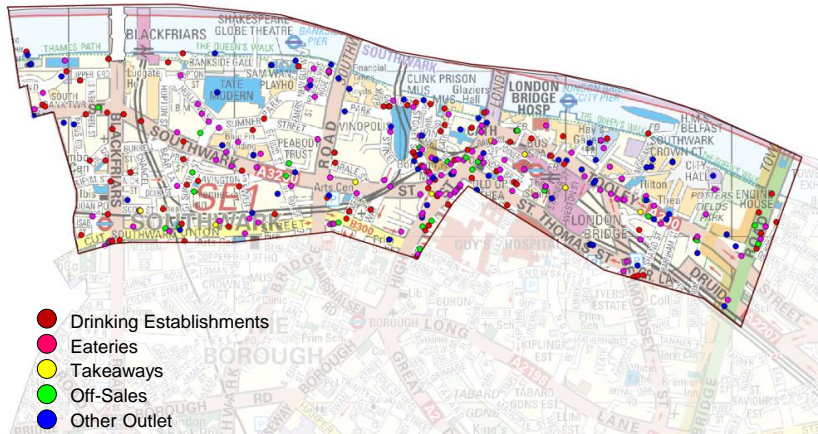
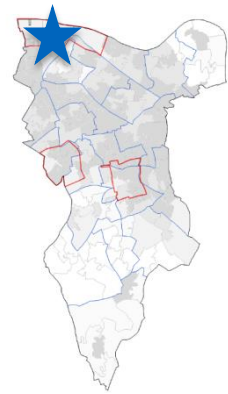
Segmenting the applications reveals subtly different patterns of distribution across the borough

GEOGRAPHICAL ANALYSIS



In areas that are saturated with alcohol outlets, Southwark enforces Cumulative Impact Zones

BANKSIDE CUMULATIVE IMPACT ZONE



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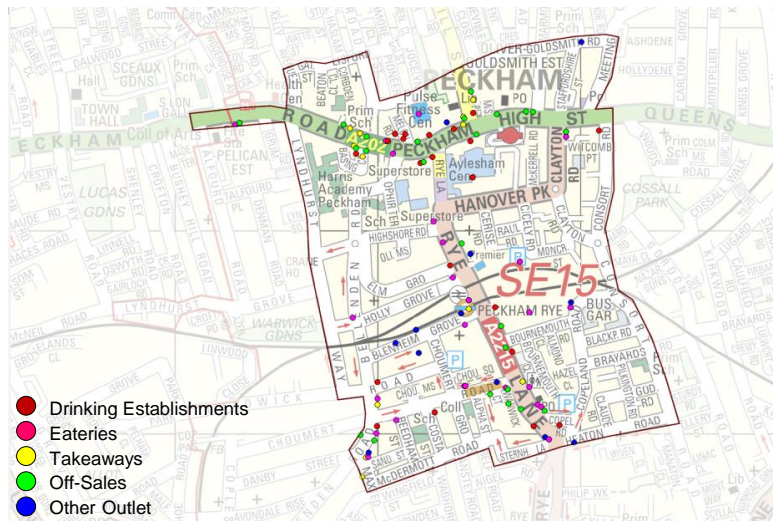
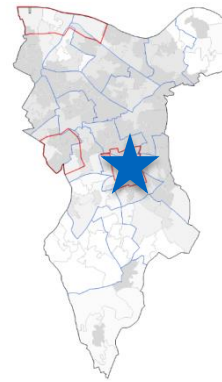
- Bankside is the mostly densely populated CIZ
- A large number of all alcohol outlet types can be seen across the zone except for takeaways



Bankside is home to a number of tourist destinations and iconic buildings including The Shard, Shakespeare Globe Theatre and Borough Market. The area is affluent and operates thriving night-time economy

In areas that are saturated with alcohol outlets, Southwark enforces Cumulative Impact Zones

PECKHAM CUMULATIVE IMPACT ZONE



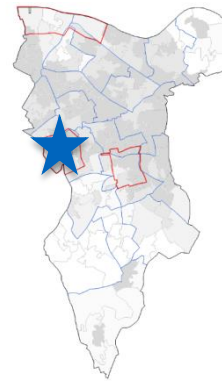
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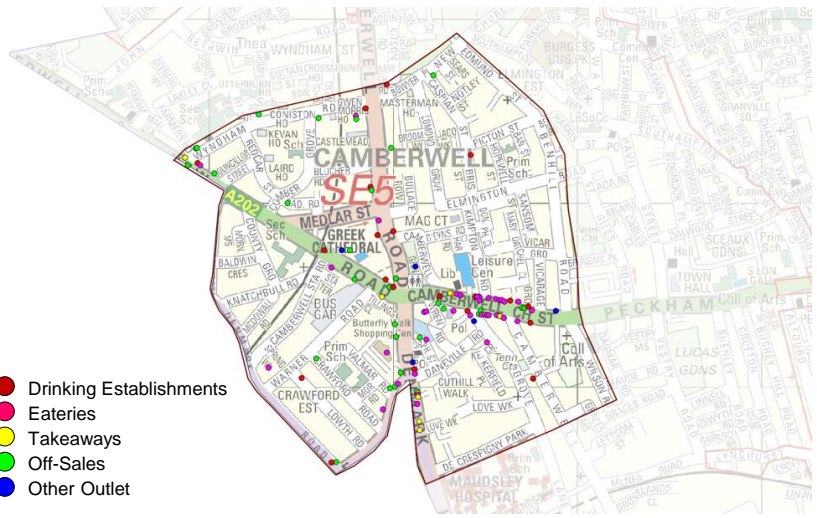
- A large number of takeaways and drinking establishments can be seen along Peckham High Street
- Peckham CIZ has an increasing number of eateries, particularly on and around Rye Lane
- Peckham CIZ has a high number of off-sales

Traditionally a highly deprived area of London, Peckham is experiencing rapid rates of gentrification. In 2012, Southwark revealed ambitious regeneration plans to improve Peckham Rye station and surrounding areas.

In areas that are saturated with alcohol outlets, Southwark enforces Cumulative Impact Zones



CAMBERWELL CUMULATIVE IMPACT ZONE



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- A large number of restaurants and takeaways are densely populated along Camberwell Church Street
- There are a high number of off-sales across the CIZ
- Drinking establishments are located off main roads, in more residential areas

Camberwell is a deprived area of Southwark. Like Peckham, the area is showing signs of gentrification. A regeneration project is planned for Camberwell Green into which the Council plans to invest £11 million.

Eateries are the most common type of licence application across all three zones

ANALYSIS BY OUTLET TYPE

		B BANKSIDE	PECKHAM	CAMBERWELL	SOUTHWARK
●	Drinking Establishments	59	15	10	530
●	Eateries	103	31	24	590
●	Takeaways	12	5	4	133
●	Off-sales	32	17	11	477
●	Other Outlet	91	17	4	267
	TOTAL	297	85	55	

A large proportion of 'other outlets' are located across Borough Bankside and Peckham CIZs. This category contains different outlets including butchers, florists, churches and schools. Southwark is home to a wide range of licensed outlet types; there were 100 different entries for outlet type in the database. Such varieties of licence applications cause difficulties when submitting representations as they often do not fall into a single category in the licensing policy.

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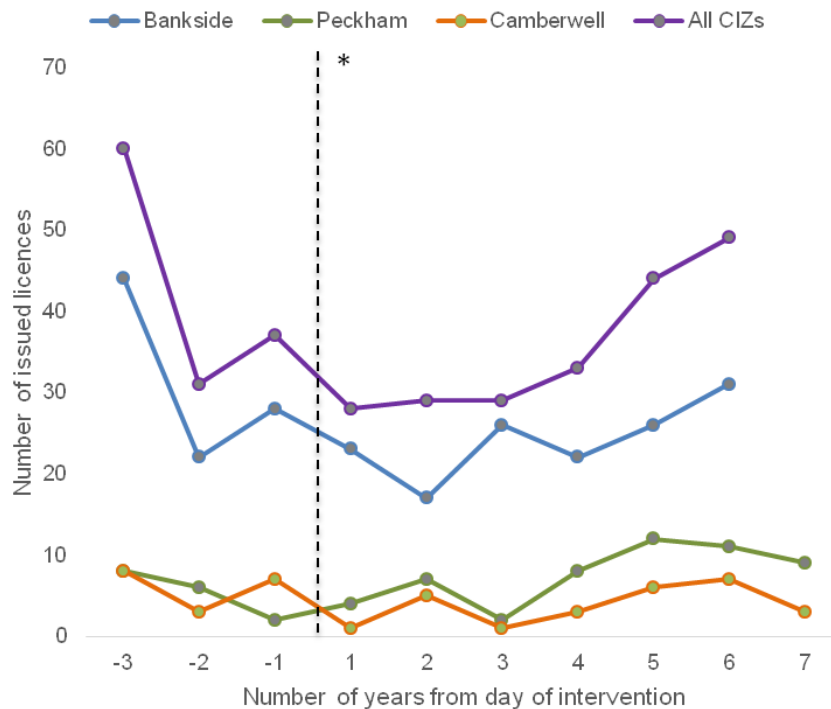
Implications and recommendations

The impact of the CIZs appear to be to reduce activity in the short-term but with growth thereafter

QUESTION ONE

The graph below relates to the number of issued licences

The trend for the number of applications made within each policy area follow an almost identical pattern



* Date of CIZ establishment

- Borough Bankside issued fewer licences for two years post intervention but then started to gradually issue more
- Fewer licences are issued per year in Camberwell and Peckham with numbers increasing in later years
- Across all CIZs, despite maintaining lower numbers over a three year period, in later years, the number of licensed outlets increased

Peckham CIZ was the only area to see growth both in applications and licences issued

QUESTION ONE

	LICENCE APPLICATIONS (mean/year)			LICENCES ISSUED (mean/year)		
	Pre-CIZ	Post-CIZ	Change	Pre-CIZ	Post-CIZ	Change
All CIZs	17.7	13.5	-23.7%	16.1	12.3	-30.9%
B Bankside	34.0	27.3	-19.7%	31.8	25.6	-24.2%
Peckham	7.0	8.9	+27.1%	6.2	7.4	+16.2%
Camberwell	7.3	4.5	-38.4%	6.0	4.3	-39.5%
Control	34.0		-	30.0		-

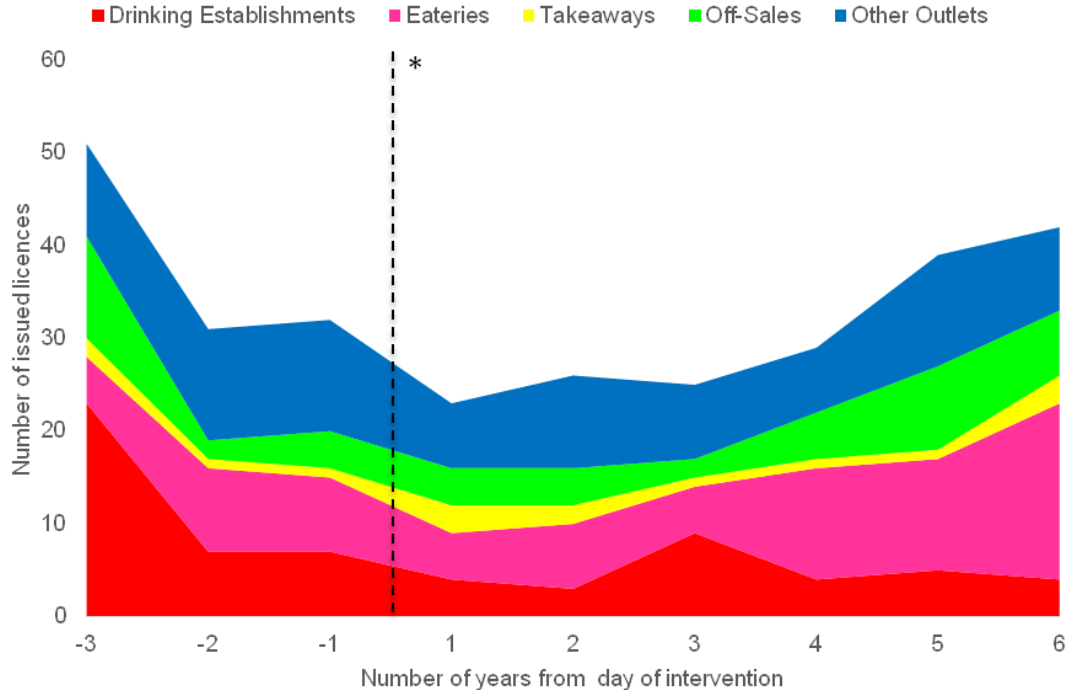
There was a reduction in the mean number of applications made and issued for both Borough Bankside and Camberwell, with the greatest reduction seen in Camberwell. In Peckham the mean number of applications made and issued increased post-CIZ

There has been growth in the number of licences issued to 'eateries' over recent years

QUESTION TWO

The graph below relates to the number of issued licences

The trend for the number of applications made within each policy area follow an almost identical pattern



Drinking Establishments

Despite a peak in year three the numbers decreased

Eateries

A year on year increase

Takeaways

Numbers remained stable

Off-sales

Numbers are stable in earlier years but then start to increase

Other Outlets

Numbers remained relatively stable

* Date of CIZ establishment

Data suggest that applications and licences for drinking-led establishments have fallen (1 of 2)

QUESTION TWO

	LICENCE APPLICATIONS (mean / year)			LICENCES ISSUED (mean / year)		
	Pre-CIZ	Post-CIZ	Change	Pre-CIZ	Post-CIZ	Change
DRINKING ESTABLISHMENTS						
All CIZs	9.6	3.3	-66%	8.3	3.0	-64%
B Bankside	8.6	4.5	-48%	8.3	4.0	-52%
Peckham	2.7	1.6	-41%	2.7	1.6	-41%
Camberwell	5.0	0.0	-100%	3.0	0.0	-100%
Control	12.7		-	10.7		-
EATERIES						
All CIZs	4.9	5.8	+18%	12.8	4.6	+19.6%
B Bankside	10.3	10.3	0%	9.8	9.8	0%
Peckham	1.3	3.9	+200%	0.6	3.6	+500%
Camberwell	2.0	2.8	+40%	2.0	2.8	+40%
Control	21.4		-	19.0		-
TAKEAWAYS						
All CIZs	3.9	1.4	-64%	3.6	1.3	-64%
B Bankside	1.6	1.0	-38%	1.6	1.0	-38%
Peckham	1.0	1.0	0%	0.8	1.0	+25%
Camberwell	1.0	1.5	+50%	1.0	1.5	+50%
Control	4.8		-	4.5		-

Data suggest that applications and licences for drinking-led establishments have fallen (2 of 2)

QUESTION TWO

	LICENCE APPLICATIONS (mean /year)			LICENCES ISSUED (mean /year)		
	Pre-CIZ	Post-CIZ	Change	Pre-CIZ	Post-CIZ	Change
	OFF-SALES					
All CIZs	11.0	2.8	-58%	9.9	2.5	-56%
B Bankside	4.3	3	-75%	4	3	-75%
Peckham	3.0	2.2	-30%	2.5	1.4	-25%
Camberwell	1.3	3.5	-27%	1.3	3.5	-44%
Control	17.5		-	15.7		-
	OTHER OUTLETS					
All CIZs	9.6	4.9	-49%	8.5	4.2	-51%
B Bankside	10.3	8.4	-18%	9.2	7.6	-17%
Peckham	1.2	2.8	+133%	1.2	2.0	+67%
Camberwell	1	1	0%	1	0.66	-34%
Control	11.6		-	10.1		-

There was a reduction in the mean number of applications made and issued for drinking establishments and takeaways for all CIZs. Conversely eateries were found to increase, with the mean number of licences issued in Peckham increasing by a factor of 6. Peckham also saw an increase in the number of 'other outlets' and takeaways were found to increase in Camberwell.

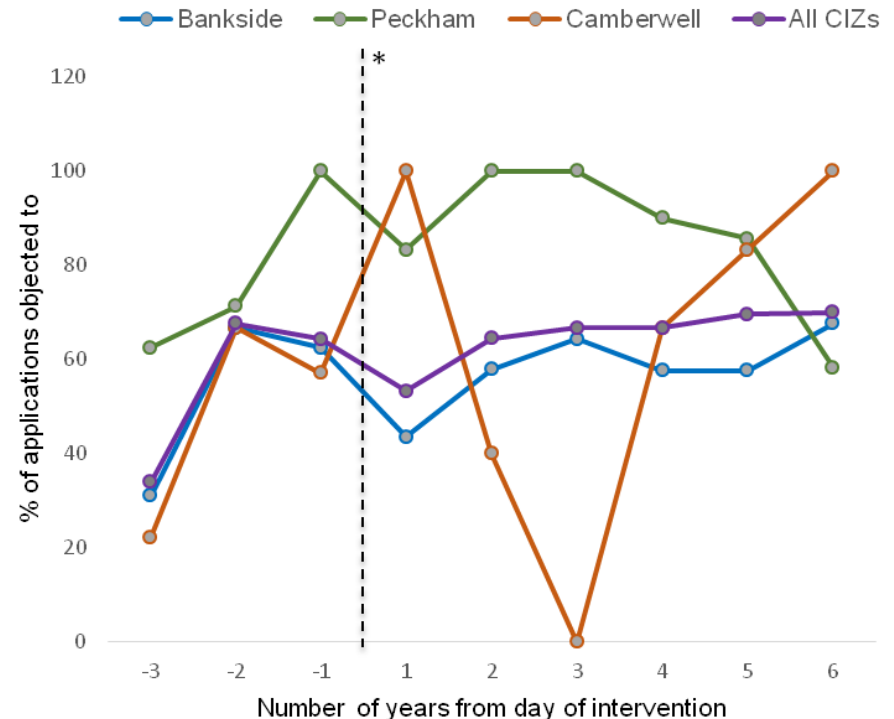
It appears that the objection rate has remained steady since CIZ implementation

QUESTION THREE

By taking into account the upward trajectory of applications, the proportion of applications to which a representation was made has remained steady, with a minor trend upwards.

- Objections in Borough Bankside follow a similar pattern to 'All CIZs'
- In Peckham, the proportion of applications objected to have decreased in recent years, potentially reflecting the increase in the number of food-led establishments more recently
- Camberwell's trend is sporadic due to low numbers of applications (one in year three)

While there is some trend upwards, there are limitations around data quality, and it may be that the quality of application has risen.



* Date of CIZ establishment

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CIZ success is not about limiting outlet density, it is the objection and negotiation process that is key

KEY MESSAGES

Question one

CIZ establishment has not substantially affected the number of issued licences

- During a recession, applications maybe more likely in areas where there is considerable footfall
- The quality of licence application may have improved
- RAs may have objected to applications that did not support the licensing objectives and negotiated conditions to regulate licensable activity

Question two

CIZ establishment affected the type of application, in particular eateries have increased

- Drinking establishments reduced in numbers across all CIZs, in Camberwell not a single licence was issued post establishment
- Food led establishments are exempt from the licensing policy in Peckham and Camberwell
- CIZs appear to have shaped the night time economy in these areas to support regeneration goals

Question three

The number of objections to new licence applications has increased post CIZ establishment

- CIZs reshape the local alcohol environment in a subtler way than limiting outlet density
- RAs are negotiating less permissive conditions to control the licensable activities of new alcohol outlets in CIZs
- Such conditions have important implications for addressing the local burden of alcohol related harm

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Although a robust analytical method was conducted a number of limitations should be considered

LIMITATIONS

- For the purpose of the academic components of the project, separate statistical analyses were completed. This analysis compared the changes in alcohol exposure within the CIZs to the changes outside the CIZs i.e. the rest of Southwark. Findings for questions one and two indicated that when compared to the control area (the rest of Southwark) the number of issued licences were found to increase. Academic publication of this research will reflect these findings
- CIZ analysis compared the alcohol exposure from before and after CIZ establishment. To simplify the analytical process, the extension of CIZs was not incorporated into the analysis
- Geographical analysis allowed the number of applications to be mapped by outlet type. However, the number of issued outlets has not been mapped for time and capacity reasons. This activity could be completed with assistance from the Community Safety Team
- Assigning outlets to a 'type' category was a manual and subjective task and therefore may not be 100% reproducible
- Categorising the data set into three CIZ categories (and the rest of Southwark) as well as into five outlet type categories rendered some of these groups with very few observations and therefore it was difficult to analyse associated trends
- Although a positive association was found between objections and the establishment of a CIZ, since the 'objection' field in APP is not mandatory, this effect is likely to be underestimated

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Southwark is regarded as a pioneer in terms of our alcohol work: and we feel we can achieve more

IMPLICATIONS & RECOMMENDATIONS

Implications

- This research provides a deeper insight into the type of alcohol exposure present at different locations within Southwark
- The findings and trends from this analysis can be used inform licensing decisions as well as the next Statement of Licensing Policy
- This research is the first of its kind and showcases Southwark as a pioneer in terms of licensing work

Next Steps

- Analyse the outcome of objections in an attempt to quantify the extent to which alcohol availability is controlled*
- Build on the methodology employed to investigate the relationships between outlet type and alcohol-related outcomes including; violence, crime, disorder, acute and chronic health outcomes
- Continue to leverage licensing intelligence to update this data set on an ongoing basis

**To facilitate future analyses, APP should better capture if an objection is made, as well as the outcome to that objection*

Find out more at
southwark.gov.uk/JSNA

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