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**Elephant and Castle Shopping  
Centre Redevelopment - Bingo Hall  
Survey Results: Final Report**

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## 1 INTRODUCTION

### 1.1 Purpose

Southwark Council has commissioned AECOM to undertake additional customer surveys of the Palace Bingo hall as part of the Equality Analysis of the Elephant and Castle Shopping Centre Regeneration Scheme. The Equality Analysis, which was also undertaken by AECOM from March until June 2016, considered how the redevelopment and any associated decision by the Council's cabinet to proceed with a CPO could impact on businesses and communities, including people sharing protected characteristics, located in the development area.<sup>1</sup> The analysis highlighted the potential negative equality effects from reduced access to local services as well as worsened social inclusion to older and Black and Minority Ethnic (BME) people using the Palace Bingo hall as a result of its loss or relocation and the lack of alternative bingo facilities within the local area. As age and race are protected characteristics under the Public Sector Equalities Duty<sup>2</sup>, the Council instructed AECOM to carry out additional survey work specifically targeted at the users of the Palace Bingo hall in order to understand their patterns of use, aspirations and issues related to the potential redevelopment of the shopping centre.

This analysis presents the results of the customer survey and considers how the redevelopment and any associated decision by the Council's cabinet to proceed with a CPO could impact on Palace Bingo hall customers sharing protected characteristics. This process will support Southwark Council to continue to fulfil its Public Sector Equalities Duty in relation to the proposed scheme.

### 1.2 Background of Elephant and Castle Opportunity Area

The Elephant and Castle, located in the London Borough (LB) of Southwark, has been identified as an Opportunity Area in Southwark Council's Core Strategy<sup>3</sup> and the London Plan<sup>4</sup>. The Greater London Authority has defined Opportunity Areas as "London's major source of brownfield land with significant capacity for new housing, commercial and other development linked to existing or potential improvements to public transport accessibility"<sup>5</sup>.

The Elephant and Castle Opportunity Area covers 122 hectares, as outlined in the Elephant and Castle Supplementary Planning Document (SPD), which was subject to equalities impact assessment. This includes the Elephant and Castle Shopping Centre, Elephant Square, Elephant Park, Walworth Road, the Pullens Estate, West Square, St George's Circus, the Enterprise Quarter, and the Newington and Rockingham Estates<sup>6</sup>.

A key part of the regeneration of Elephant and Castle is the shopping centre. This was opened in 1965 and was the first covered shopping mall in Europe. Unfortunately the original design principles have not stood the test of time, and the adopted SPD provides a planning framework for the redevelopment of the site to transform the character of the town centre and improve its appeal as a shopping destination to a wider catchment area.

The Equality Analysis of the Elephant and Castle Shopping Centre Redevelopment revealed that businesses currently located within the shopping centre comprise a wide range of business types providing both goods and services. There are also approximately 15 businesses located within the railway arches, excluding two businesses located in the arches that have access to the shopping centre

<sup>1</sup> These are the grounds upon which discrimination is unlawful. The characteristics are: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation. Although the socio-economic duty part of the Equality Act 2010 was not implemented by the government, Southwark Council's approach to equality also considers socioeconomic disadvantage.

<sup>2</sup> Southwark Council is required by UK law to pay due regard to advancing equality, fostering good relations and eliminating discrimination for people sharing certain protected characteristics, as set out in the Public Sector Equalities Duty (2011) (under section 149 of the Equalities Act 2010).

<sup>3</sup> Southwark Council (2011) *Core Strategy* [online] available at: [http://www.southwark.gov.uk/downloads/download/2648/documents\\_for\\_core\\_strategy\\_adoption](http://www.southwark.gov.uk/downloads/download/2648/documents_for_core_strategy_adoption), accessed November 2015.

<sup>4</sup> Greater London Authority (2011) *The London Plan* [online] available at: <http://www.london.gov.uk/priorities/planning/london-plan>, accessed November 2015.

<sup>5</sup> Available at: <https://www.london.gov.uk/priorities/planning/opportunity>

<sup>6</sup> Southwark Council (2012) *Elephant and Castle Supplementary Planning Document* [online] available at: [https://www.southwark.gov.uk/downloads/download/2896/elephant\\_and\\_castle\\_spd\\_supporting\\_documents](https://www.southwark.gov.uk/downloads/download/2896/elephant_and_castle_spd_supporting_documents)

and two businesses that have access at the railway station. These also businesses comprise a mix of business types that provide a range of goods and services to the local community.

### 1.3 **Palace Bingo**

Palace Bingo hall is located on the upper floor of Elephant and Castle Shopping Centre (full postal address is Elephant & Castle Shopping Centre, First Floor, New Kent Rd, London, SE1 6TE). With capacity for 2000 bingo players, Palace Bingo is open seven days a week and offers refreshments to patrons and free parking is provided on site.

The bingo hall provides leisure, entertainment and community services to a wide range of ethnic minority and elderly customers, and in order for Southwark Council to fulfill its Public Sector Equalities Duty, any impact on these customers, including customers sharing protected characteristics, must be fully understood.

### 1.4 **Report Structure**

This report is structured as follows:

- Chapter 1: Introduction
- Chapter 2: Methodology
- Chapter 3: Analysis of survey results
- Chapter 4: Conclusion

## 2 METHODOLOGY

### 2.1 Introduction

The survey methodology was designed to enable to capture the views of the users of the bingo hall who are also likely to be affected by the regeneration scheme.

The methodology for undertaking the customer survey and compiling this report comprised the following stages:

- survey design;
- implementation and analysis of the customer survey results; and
- preparation of this report.

This research has been conducted with the application of best practice approaches to Market and Social research in accordance with AECOM's position as a Market Research Society Company Partner. This ensures that all research is conducted within industry guidelines, ensuring that sampling is robust and that data is collected and handled in accordance with the Data Protection Act (with which AECOM is also registered).

### 2.2 Survey design

The survey was designed in order to gather the views of Palace Bingo hall customers who will be potentially affected by the proposed redevelopment of the Elephant and Castle shopping Centre. A copy of the customer survey can be found in **Appendix A**.

The survey closely mirrored the customer survey developed as part of the Equality Analysis in order to help facilitate comparison of results. However, in order to capture new baseline data on specific users of the bingo hall, additional questions were included and other questions were amended. Similarly, the survey was of a structured design that captured a combination of quantitative and qualitative information. This approach helped to ensure that relevant factual information was collected, whilst also allowing respondents to share their views on the bingo hall and the proposed redevelopment. A series of demographic questions were also included, although these questions were asked for qualifying respondents only (see Section 2.4 below for further details).

The implementation of the customer surveys adhered to best practice principles of survey design. This included the avoidance of leading and double-barrelled questions, careful choice of wording (e.g. clear, lay language) and type (e.g. closed, open), the application of logical sequencing and simple layout, and consideration of questionnaire length.

### 2.3 Conducting the surveys

The face-to-face surveys were specifically conducted with customers of the Palace Bingo Hall. The fieldwork was conducted on site from 10 February 2017 to 19 February 2017 and all interviews were conducted by trained professional market research interviewers who were contracted by AECOM. The staff are engaged as individuals and briefed and managed by AECOM, but are paid by a third party payroll company (Morson).

In total **138 customers** of the bingo hall were interviewed. Respondents were stopped at random and asked to participate in the survey and no screening criteria was applied other than the exclusion of all those who stated this was their first ever visit to the bingo hall. Interviewing took place in the area directly outside the bingo hall premises – in agreement with the property managers and Palace Bingo owners (Palatial Ltd). The property management team at Elephant and Castle Shopping Centre and the owner of the bingo hall were contacted in advance (around 2 weeks prior to the commencement of the fieldwork) and were provided with a Letter of Authority (**Appendix B**). The Letter of Authority was pre-agreed with Southwark Council to legitimise the activities of the interviewers and to instill respondent confidence in the purpose and independence of the survey.

The customer surveys were conducted with members of the general public who were recruited 'on street' for convenience - i.e. stopped and asked to take part near the entrance of the Palace Bingo hall. All of those interviewed either use or were using the Bingo hall on the day of the interview.

All interviews were conducted on tablets through a scripted questionnaire which enforces routing and logic checks at data collection. The results were captured and automatically submitted to generate the resultant dataset. These data were then checked, cleaned and coded in the case of open-ended responses.

**2.4 Limitations and constraints**

Information provided by Southwark Council indicated that the bingo hall is used by around 650 customers per day, and therefore recruitment of a sample group was set to comprise 20% of this, (n=130 interviews). In total 138 interviews were completed. The degree of confidence we can place on this is demonstrated in the table below.

**Table 2.1: Confidence intervals associated with sample size**

Sample Size	Confidence Intervals (95%)	Confidence Intervals (95%)	Confidence Intervals (95%)
	50% Viewpoint	25% Viewpoint	10% Viewpoint
	%	%	%
<b>(138)</b>	+/- 8.3%	+/- 7.2%	+/- 5%

The nature of the customer survey and the small total eligible population size mean that results are not intended to be generalised more widely and the responses can be seen as indicative. Similarly, the random nature of the on-street survey sample limits the reliability of responses as it is not weighted nor were quotas applied to be reflective of any population – it is meant to provide an indicative response of general users of the Bingo Hall. As a result caution should be taken in interpreting the on-street survey data findings, and these cannot be generalised to represent views of the wider population.

### 3 ANALYSIS OF SURVEY RESULTS

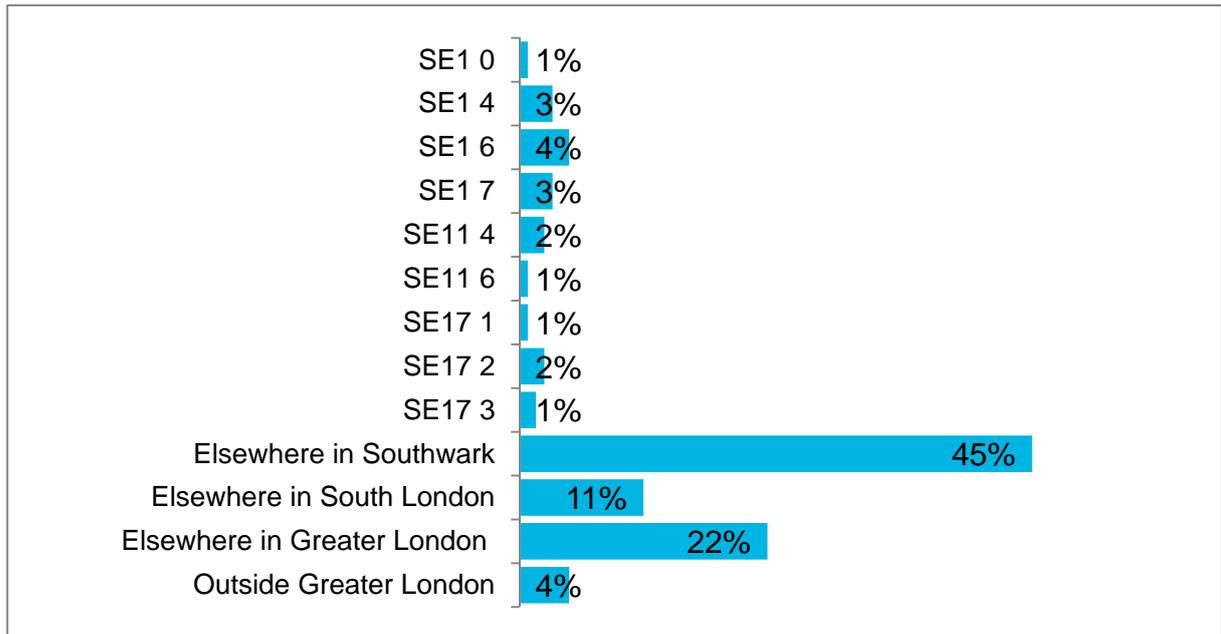
#### 3.1 Introduction

This chapter presents findings from the surveys conducted by AECOM with customers of the Bingo Hall.

#### 3.2 Customer Survey Results

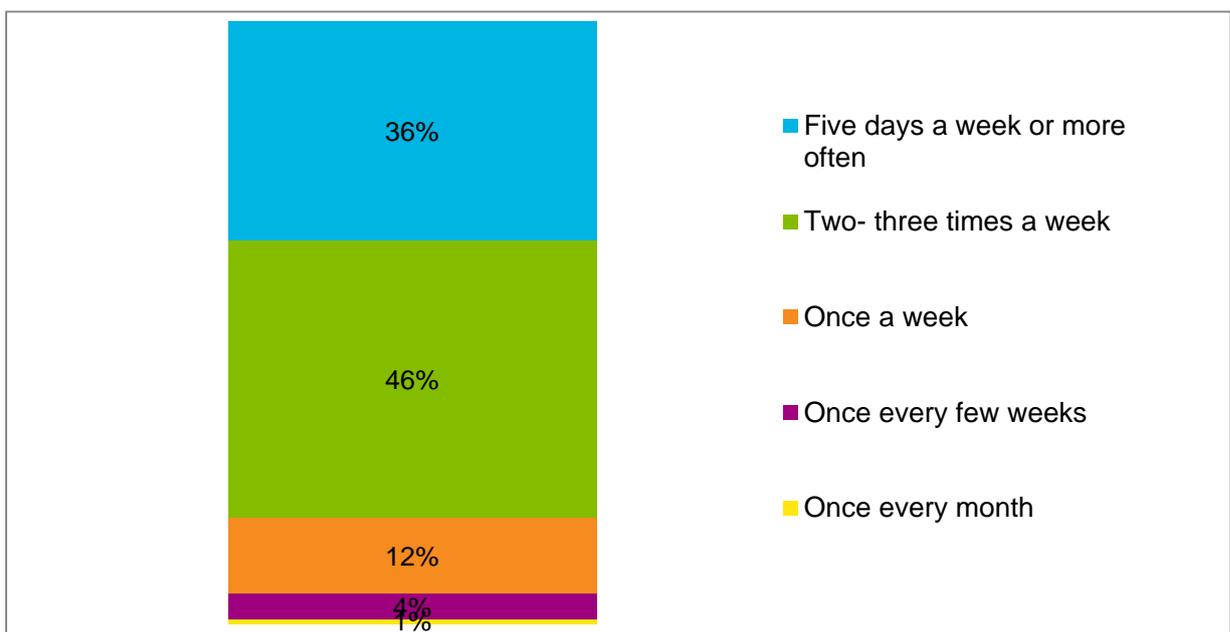
In total 138 interviews were conducted with users of the Palace Bingo hall. In order to understand the geographic profile of those using the site, all respondents were asked where they live. Just over six in ten of those interviewed (63%) stated that they reside in the London borough of Southwark.

**Chart 3.1: Geographic Profile of Bingo users – Base (138)**



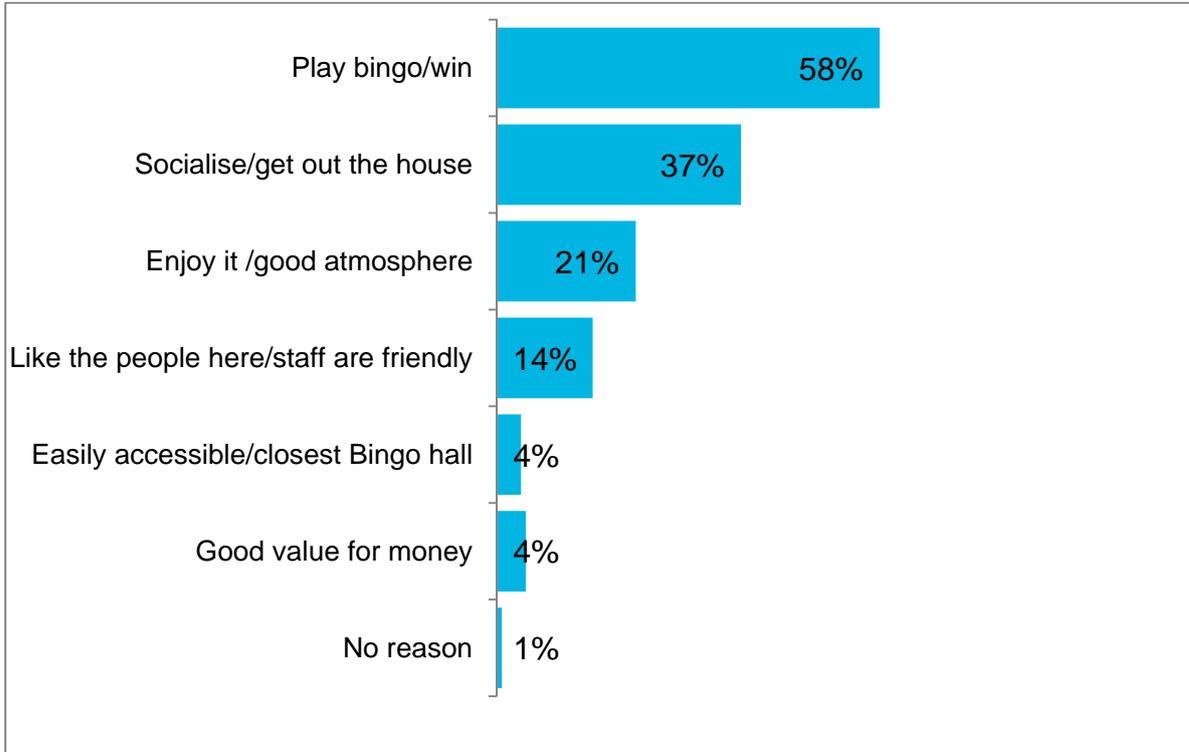
The data suggests that the much of Palace Bingo' regular clientele are very regular users with over a third of survey participants visit on five days or more a week. In total 82% of survey participants visit at least twice a week.

**Chart 3.2: Frequency of use profile of regular Bingo users – excludes two respondents making first visit - Base (136)**



When asked what their main reasons for visiting the bingo were besides playing bingo and trying to win money (58% of replies), themes around getting out of the house and socialising with friends were cited by over a third of users (37%).

**Chart 3.3: Reasons for visiting Palace Bingo- open question coded - Base (138)**



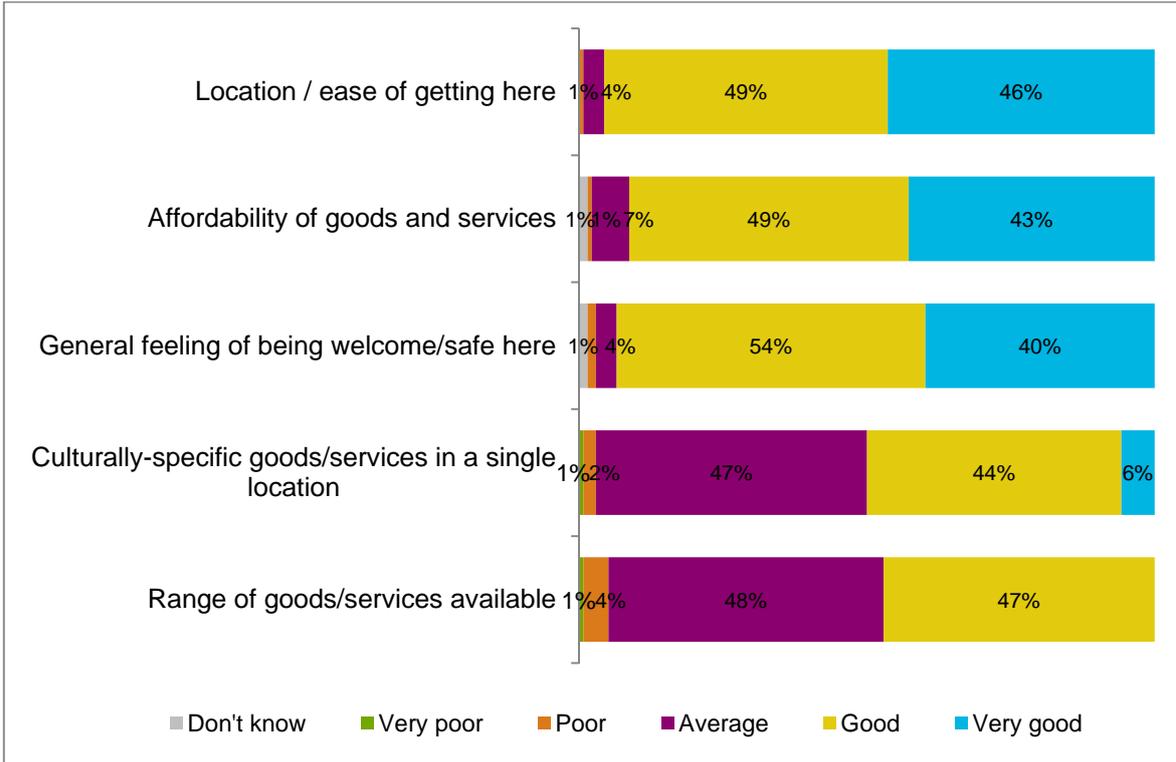
Just nine out of the total sample group (7%) visit other bingo clubs in the area. Those visited are shown in the table below:

**Table 3.1: Other bingo outlets visited – count shown due to low response - Base (9)**

Bingo outlets	Count
Gala Bingo Surrey Quays (3 Tereido St, London SE16 7LW)	2
Gala Bingo - Tooting Broadway (50 Mitcham Rd, London SW17 9NA)	3
Beacon Bingo -Streatham ( 110 Streatham Hill, Streatham, London SW2 4RD)	2
Gala Bingo Bexleyheath (28-70 Broadway, Bexleyheath DA6 7RB, UK)	1
Beacon Bingo –Cricklewood (Cricklewood Broadway, Cricklewood, London NW2 3DU, UK)	1
<b>Total</b>	<b>9</b>

Elephant and Castle is rated most positively by respondents on the attribute of 'location/ease of getting here' with 96% rating it as 'good' or 'very good' on this attribute.

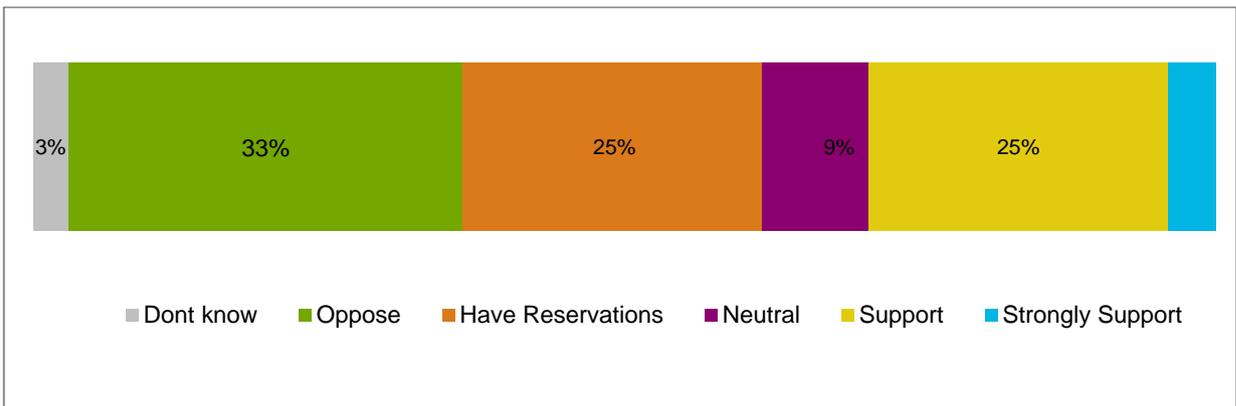
**Chart 3.4: Rating of Elephant and Castle on various attributes- attributes ranked on 'very good' rating**



Sixty nine percent of respondents were aware of the planned redevelopment of Elephant and Castle shopping centre. There is no statistically significant link between awareness of the development and frequency of use of the bingo hall.

When all survey participants were given a brief description of the planned changes a quarter stated that they 'have reservations' (25%) about them, and a further third (33%) stated that they 'oppose' them.

**Chart 3.5: Extent of support for redevelopment proposals – Base (138)**



All participants were then asked to expand on why they support/oppose or have no particular feelings towards the regeneration of Elephant and Castle shopping centre.

Those who stated that they support the redevelopment to some degree felt it would bring more people to Elephant and Castle (46%, n=19) and a fifth (22%, n= 9) felt that the regeneration will benefit local people bringing jobs. Forty one percent (n=17) respondents who described themselves as being in support of the redevelopment were concerned about the impact of it on the bingo hall and whether it could be retained or moved.

**Table 3.2: Reasons given by those in support of regeneration – multiple response possible: Open question - Base (41)**

Reason for strong support/support of regeneration		%
Support redevelopment but don't want to lose the bingo/bingo should be retained/relocated	19	46%
Support level depends on plans for bingo/want to know more	17	41%
Regeneration is good for local people/improved housing/More jobs	9	22%
Everything will become more expensive/rents are going up	6	15%
Changes are unnecessary	1	2%
Regeneration is good for local people/improved housing/More jobs	1	2%
Will bring more visitors to Elephant and Castle	1	2%
Total	(41)	

The most commonly cited reason for being opposed or having concerns or reservations about it was related to the loss of Palace Bingo, felt that it should be retained or relocated. Three in ten responses (30%, n=24) related to the uncertainty about the position of Palace Bingo in the redevelopment and wanting to know more about this.

**Table 3.3: Reasons given by those in opposition to/reservations about – multiple response possible: Open question - Base (80)**

Reason for opposition to/reservations about regeneration	n	%
Don't want to lose the bingo/bingo should be retained/relocated	77	96%
Support level depends on plans for bingo/want to know more	24	30%
Area is rundown /in need of improved facilities	1	1%
Everything will become more expensive/rents are going up	1	1%
Changes are unnecessary	1	1%
Total	(80)	

All survey participants were then asked what the impacts will be on the local community in Elephant and Castle and over half of responses (55%, n=76) consisted of positive sentiment regarding the changes. Four in ten (41%, n=57) indicated that the redevelopment would bring positive change in terms of new homes, shops and facilities for the area.

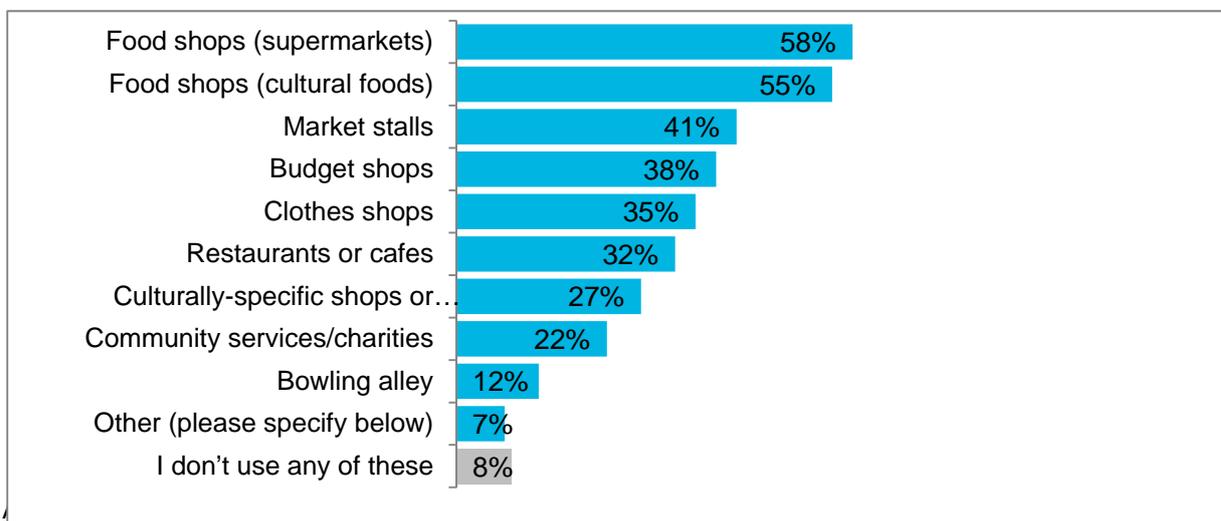
In terms of negative responses, 12% of comments were pessimistic in tone, these tended to be linked to concerns about loss of the bingo facility (12%, n=16) although some of those who felt that the redevelopment would have a positive impact on the area shared these concerns.

**Table 3.4: Reasons provided for impact of regeneration on local community – Base (138)**

Responses re impact of regeneration on local community	n	%
Positive impact NET	76	55%
New homes/Shops/Better facilities	57	41%
Worried about loss of Bingo/What will happen to the bingo?	18	13%
Will bring jobs	18	13%
Negative impact NET	16	12%
I don't live in this area (Southwark)	5	4%
Will attract more people to Elephant and Castle	4	3%
Prices will go up/will impact on the poor	3	2%
Too much shopping/current shops are fine	2	1%
Don't know	16	12%
Total	(138)	

All respondents were asked to select what facilities they use within the shopping centre and then asked whether they have any concerns about the impact of the new development might be on the services they use.

**Chart 3.6: Facilities in Shopping centre and surrounding used by Palace Bingo users - Base (138)**



All respondents who use facilities in the centre were then asked whether they have any concerns about the facilities they use and any impact of the redevelopment on them. Thirty three survey participants expressed concern about the facilities they use. Those that use culturally specific services (42%, n=14) were the most concerned about the impact of the regeneration on them. Around a third of those that use Cultural food shops (36%, n=12) and culturally-specific shops (33%, n=11), in Elephant and Castle were concerned about the impact.

**Table 3.5: Facilities bingo users raised concerns about – Base (33)**

Facilities bingo users have raised concerns about	n	% of users concerned
Culturally-specific services	14	42%
Food shops (supermarkets)	13	39%
Budget shops	12	36%
Food shops (cultural foods)	12	36%
Culturally-specific shops	11	33%
Market stalls	9	27%
Clothes shops	8	24%
Community services/charities	8	24%
Bowling alley	6	18%
Restaurants or cafes	4	12%
Total	(33)	

When asked why they have concerns regarding the potential loss of these facilities the most commonly given reasons related to the loss of shops in the area, and fears around gentrification and increasing prices and rents as a result of this.

**Table 3.6: Reasons for concerns – open question coded – Base (33)**

Specific concerns	n	%
Worried about loss of shops	13	39%
Prices will go up and small shops will be forced out	10	30%
Save the bingo/leisure facilities for older people	3	9%
Nowhere to take children	2	6%
Want to keep culturally specific outlets	2	6%
Don't know/None	2	6%
Change is inevitable	2	6%
Worried about job losses	1	3%
Total	(33)	

The bingo users were then asked what they feel the main effects of the creation of a new town centre at Elephant and Castle will be for the users of Palace Bingo. Responses to this question show that some bingo users are unclear on what the impact of the redevelopment on Palace Bingo will be: 17% (n=23) directly asked whether the bingo will close and a further 6% (n=8) failed to recognise any potential for the redevelopment to impact on the bingo hall.

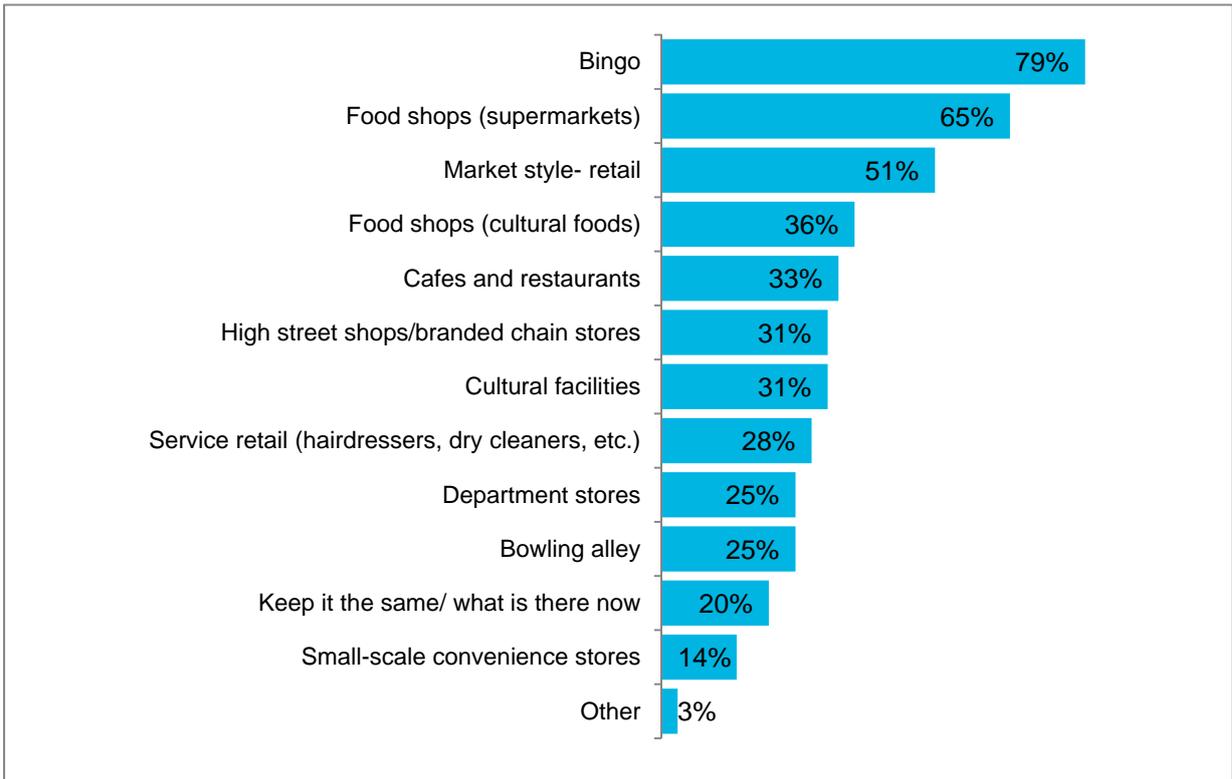
Just over four in ten replies (41%, n=57) related to the negative impacts and ideas around not wanting the bingo to close. A fifth (21%, n=29) explicitly stated that the closure of the site will leave older people nowhere to go.

**Table 3.7 Impact of regeneration on bingo users -open comments coded – Base (138)**

<b>Impact of regeneration on Palace Bingo users</b>	<b>n</b>	<b>%</b>
Will be very upset/don't want the bingo to close	57	41%
Leaves us with nowhere to go/place for old people	29	21%
Will they keep the bingo/will it be closed?	23	17%
People can use other Bingo places/I will go elsewhere/Have to go elsewhere	13	9%
Users will be affected (general)	8	6%
Will Palace Bingo relocate to somewhere else/accessible venue?	6	4%
Need to develop a new bingo place	3	2%
No effect	3	2%
May get improved bingo hall	2	1%
Bingo/Bingo Users might benefit from changes	2	1%
Other Bingo options are too far away	1	1%
Why can't they refurbish existing bingo hall?	1	1%
Area will be for the rich	1	1%
Comments re disruption during regeneration works	1	1%
Don't know	5	4%
Total	(138)	

Perhaps unsurprisingly when asked what retail or leisure services the bingo users would like to see in the new development, the most commonly cited response was bingo with 79% of responses (n=109). Half of respondents would like to see market-style retail facilities in the development (51%, n=71).

**Chart 3.7: Should the development go ahead what type of retail or leisure services would you like to see incorporated within it? – Base (138)**



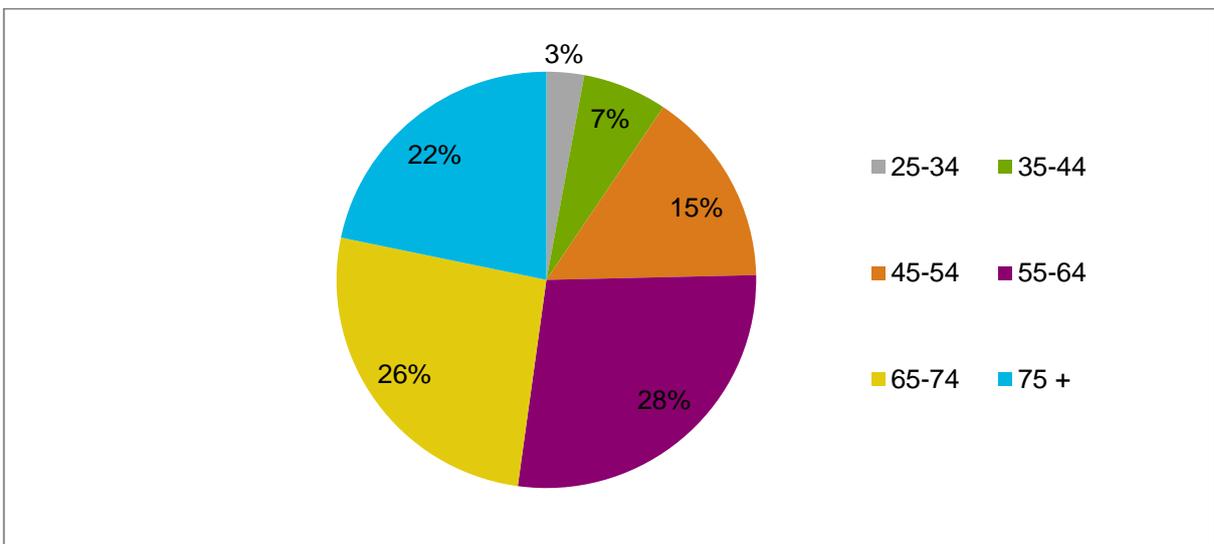
**3.3 Demographic profile of response group**

In terms of the gender profile of the bingo user sample group, there were more females than males, 41% (n=57) were male and 59%, n=81) were females.

Ten percent of the total sample group (n=14 of 138 respondents) consider themselves to have a disability. Of the 14 individuals who class themselves as having a disability, nine are aged over 65.

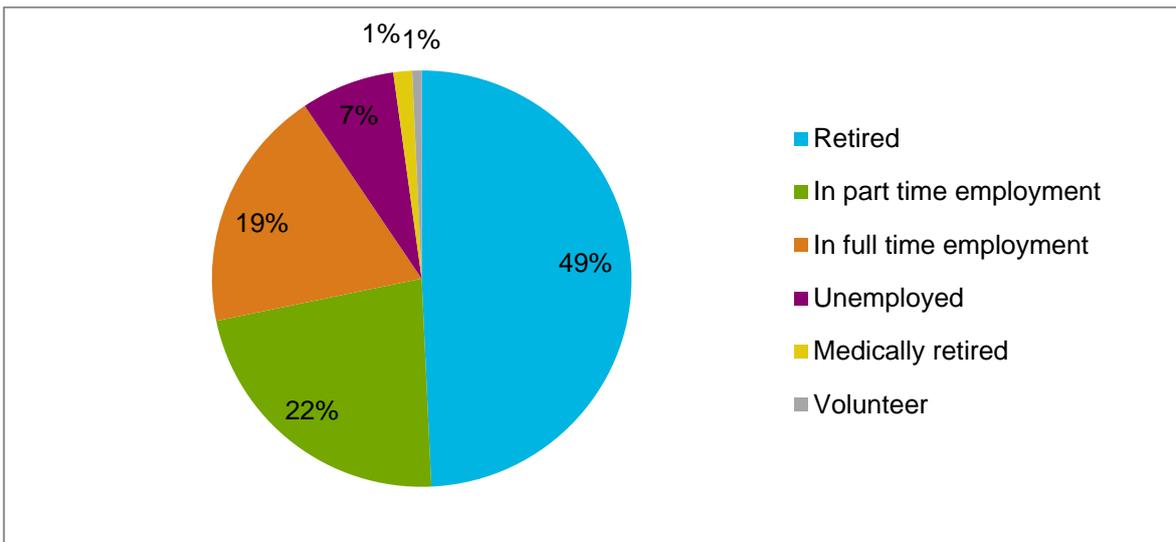
The age profile of the respondent group suggests that the bingo hall is used primarily by older people. Those aged over 65 years make up almost half (48%, n=74) of the respondent group. Nine in ten of those in the respondent group are aged over 45 (91% n=125).

**Chart 3.8: Bingo user response group- age profile – Base (138)**



Given the age breakdown of the response group it is perhaps unsurprising to find that almost half (49%, n=68) are retired. Two thirds of those aged 55-64 are still employed in some capacity (66%, n=25).

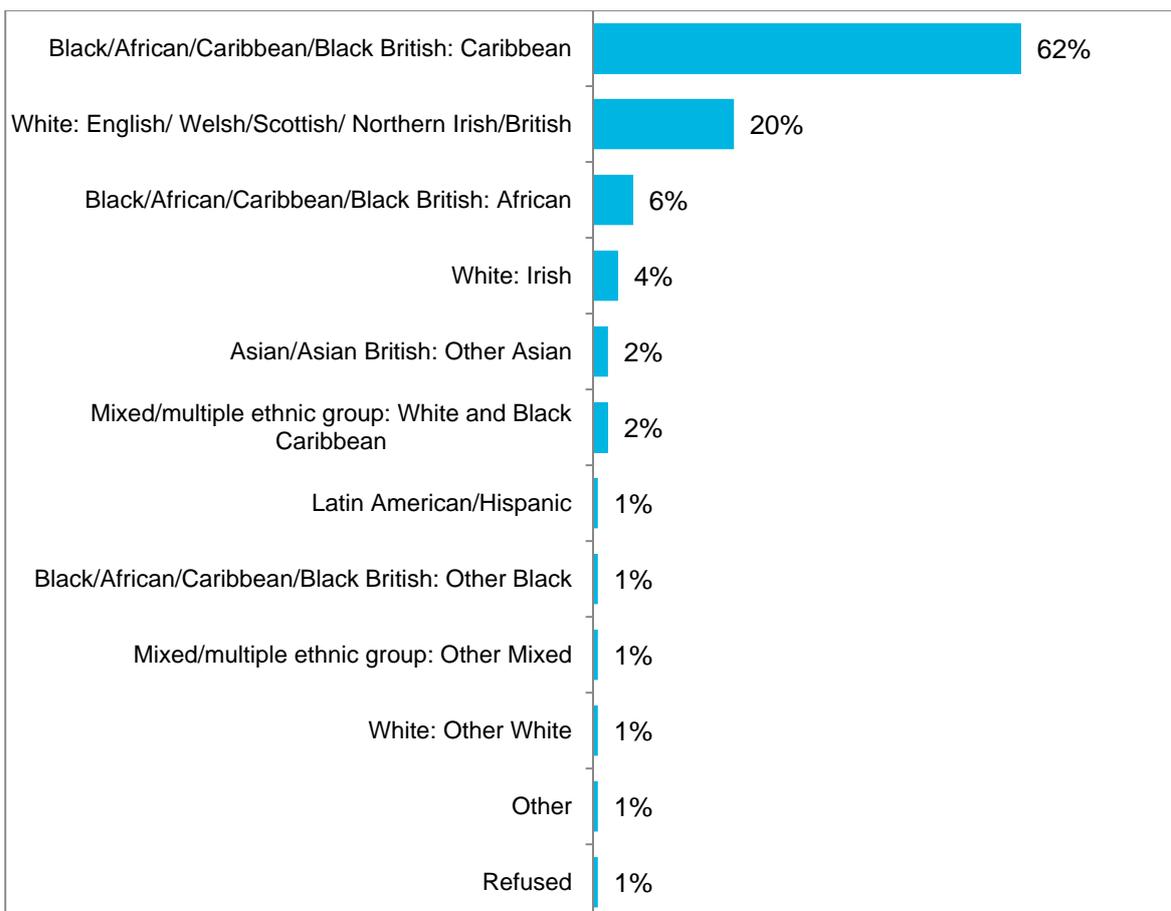
**Chart 3.9: Bingo user response group- working status profile – Base (138)**



Respondents identifying as ‘Black/African/Caribbean/Black British: Caribbean’ make up the bulk of the bingo user group with 62% (n=85).

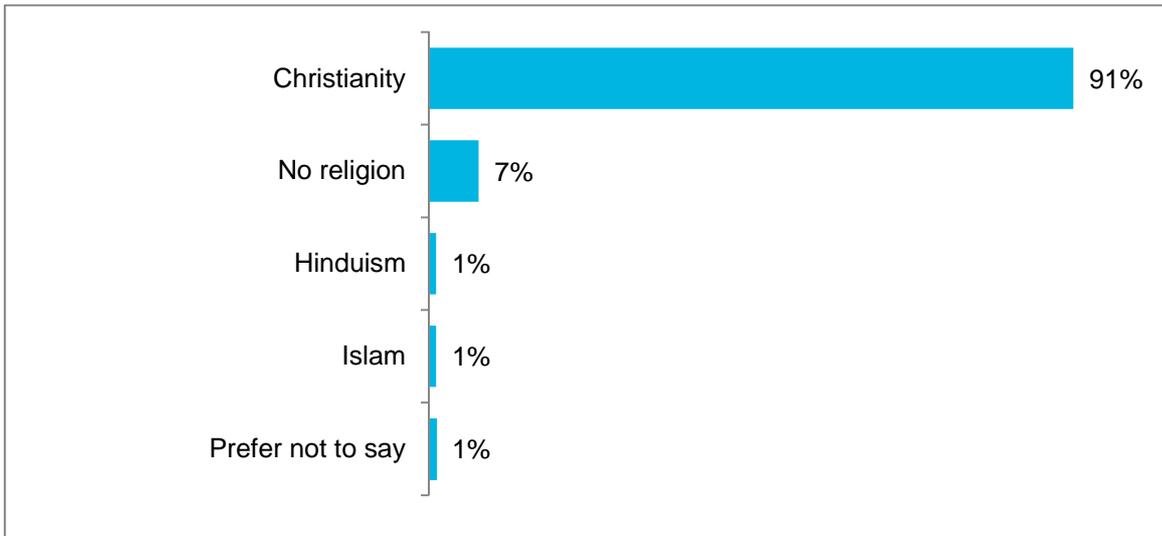
Those identifying as ‘White: English/Welsh/Scottish/Northern Irish/British’ make up the second most populous group with a fifth of the sample (20%, n=28).

**Chart 3.10: Bingo user response group- Ethnicity profile – Base (138)**



Almost all of those who took part in the survey identify as Christian (91%, n=126).

**Chart 3.11: Bingo user response group- Ethnicity profile – Base (138)**



## 4 CONCLUSION

### 4.1 Key findings of the survey analysis

The survey findings suggest that Palace Bingo hall caters mostly to a local clientele, with almost two thirds (63%) of users stating that they live within the London Borough of Southwark.

The age profile of the respondent group suggests that the bingo hall is used primarily by older people. Nine in ten of those in the respondent group are aged over 45 (91%). Those aged over 65 years make up almost half (48%) of the respondent group. Notably, half of the user group interviews (49%) are retired.

In terms ethnicity, 62% of the user group identify themselves as being of Black/African/Caribbean/Black British descent, making this the most represented group amongst the sample.

The data also suggests that the Palace Bingo hall patronage consists of regular to very regular customers: 94% of those interviewed visit at least once a week, and over a third (36%) visit on five days a week or more.

Over a third of those interviewed stated that they attend the bingo hall to socialise and get out of the house (37%). Notably, very few users visit other bingo venues – 93% only use Palace Bingo.

## **APPENDIX A: CUSTOMER SURVEY**

**APPENDIX B: LETTER OF AUTHORITY****AECOM**

AECOM  
The Colmore Building  
Colmore Circus Queensway  
Birmingham B4 6AT

**Chief Executive's  
Department**

T +44 (0)121 2621900  
www.aecom.com

**Direct dial: 020 7525 5450**

6 February 2017

To whom it may concern

**Elephant and Castle shopping centre usage survey**

This survey is being conducted by independent market Research agency AECOM who have been commissioned by Southwark Council to complete an Equalities Analysis to help them better understand use of the Palace Bingo operation in the Elephant and Castle shopping centre. The survey follows on from previous survey work at the shopping centre carried out in 2016 and has been designed to develop a more detailed understanding of the usage of the bingo hall. The survey is part of the standard consultation process undertaken with any community affected by a large development proposal.

The research is being carried out by **AECOM**, an independent research consultancy on behalf of Southwark Council.

This is genuine research that is being conducted under the Market Research Society's (MRS) Code of Conduct – you can check AECOM's MRS membership by visiting [https://www.mrs.org.uk/company\\_partner/company\\_partner\\_members/full\\_a-z\\_listing](https://www.mrs.org.uk/company_partner/company_partner_members/full_a-z_listing) and <http://www.theresearchbuyersguide.com/freephone/alpha/A>

Your answers will be treated in strict confidence in accordance with the Data Protection Act. They are used for statistical research purposes only. Names and addresses are never included with the results.

If you have any questions please call Katie Jackson at AECOM on 0121 262 6778. If you wish to speak to someone at Southwark Council about this research, please call me on 020 7525 5450 or Jon Abbott 020 7525 4902

Thank you for your help.

Yours faithfully

A handwritten signature in blue ink, appearing to read "Dan Taylor".

Dan Taylor  
**Programme manager**  
020 7525 5450