

Southwark high streets: **Project Rationale & Methodology**

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September 2015

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1. Introduction

High street traders in Southwark are under great pressure from advances in multi-channel retailing, from economies of scale brought to bear on local high streets by national retail multiples and from the easy access to the West End and other appealing shopping destinations such as Westfield Stratford. These forces draw footfall from Southwark high streets, and also make the competition to attract and convert the remaining shoppers more intense.

The effects of the recession are also still strongly felt among some of Southwark's high street customers because the borough has areas of high deprivation as well as some more affluent suburbs and tourist destinations.

Table 1: High Street Vitality: Greater London and the UK

% change year on year to April 2015	UK	Greater London
	%	%
Annual Footfall Growth	-0.8	+1.1
High Street	-0.1	
Out of Town	0.5	
Shopping Centre	-3.0	
Retail Vacancies	10.2	6.8

Source: British Retail Consortium -Springboard
<http://spring-board.info/mediaLibrary/images/english/92860.pdf>

The British Retail Consortium has been somewhat positive recently on the question of high street vitality, reporting a gradual fall in retail vacancies across the UK. It is also clear from the data in Table 1 that London is slightly ahead of the game. The BRC have suggested that the improvements are partly due to a move back to bricks and mortar retailing as a complement to omni-channel sales, and partly due to a more flexible approach to lettings from landlords.

Nevertheless, even in London the reported footfall growth represents only a slowing of a long term decline rather than a rush back to the high streets. The encouraging London vacancy rate probably also suggests an improving and more attractive retail mix which may in turn drive footfall densities on the high streets.

The overall picture from the BRC is supported in Southwark. Following the 2008 recession, the number of business start-ups in the borough declined significantly, but have now returned to pre-crisis levels although it is still the case that annual business closures have been running above a pre-recession average rate of 1,316 (2004-8) reaching 1,730 in 2012.

Southwark Council are implementing an Economic Wellbeing Strategy (EWS), which is designed to promote employment, business investment, town centre vitality and financial

independence across the borough. As part of this strategy the Council operates a £1m Business Support Fund specifically to assist small business to overcome specific barriers, and there are a range of additional support services targeted at the SME's, which make up over 99% of the Borough's commercial base. The London Borough of Southwark is also home to five of the UK's BID's: Better Bankside, Team London Bridge, South Bank BID, We are Waterloo & The Blue Bermondsey BID.

1.1 Southwark High Streets Research Project

As part of the EWS investment, Southwark Council have carried out a comparative study of high street vitality across eight locations in the borough. London South Bank University was commissioned to pilot and then carry out the data collection in February 2015, and in these reports the results are presented.

The broad aims of the study were:

- a) To establish patterns of weekday and weekend footfall on eight high streets.
- b) To describe the geo-demographic profile of visitors on those high streets
- c) To describe the usage, and attitude and motivations towards those retail centres.

The purpose was to establish initial pedestrian density benchmarks, identify potential drivers of increased footfall, and develop insight that could inform discussion of routes to improving customer attraction & conversion for individual retailers in each location.

2. Methodology

Research was conducted in high street locations across the borough, selected to represent diversity in population characteristics and in retail style and offer. The locations selected were:

- Camberwell
- Borough High Street
- Herne Hill
- Lordship Lane
- Nunhead Lane
- Peckham Rye Lane
- Southwark Park Road
- Walworth Road

Footfall observations and survey interviews were conducted simultaneously in each location by trained teams of undergraduates on Tuesday 10th and Saturday 14th February 2015 according

to the pilot study methodology. The timing was intended to minimise any mediating effects such as weather conditions, national holidays or other large-scale events. The count was started at 10.00 am and finished at 5.30 on each day, which although clearly shorter than the retail day or trading week, captured enough data to establish initial patterns.

2.1 Footfall observations

Counts were collected manually and continuously in each location according to a methodology developed in consultation with commercial research agencies. Valid subjects were counted individually rather than as groups as they crossed a fixed observation point established for each location and only adults were included. Since the count is time-bounded the measure of interest is the number of potential shoppers present on a high street at any particular moment. It is immaterial if they have been counted once before at a different time, or on a different day, thus the data describes the numbers of shoppers available to buy in any identified time period.

Counts of pedestrians passing in each direction on the pavement were conducted on both sides of each High Street in order to establish total footfall densities at the location, and recorded using standard manual “clickers”. Totals were entered onto the record sheet every 15 minutes, and a new count then started. Observers were relieved of counting duties regularly, and rotated with their team members in collecting survey data throughout the day.

2.2 Usage and Attitude Survey

Data was collected on each side of the observation points along the busiest parts of each high street. Students conducted street intercept interviews and were instructed to intercept the “*first eligible respondent they saw who was anywhere on the block as the interview period began*”, repeating that process at the end of the first interview. Refusals were recorded by gender and approximate age in order to establish the reliability of the final sample.

Street or mall intercept benefits from having a relatively low non-response rate, but more importantly it gives access to respondents that are knowledgeable about the retail location where the survey is being conducted. Over two days of data collection across the borough, a total of 684 usable interviews were completed, and over 100,000 footfall observations made.

2.3 Retail mix audits

Audits were conducted on each observed high street to obtain a sense of the diversity and depth of retail offer available, and to identify opportunities to drive footfall.

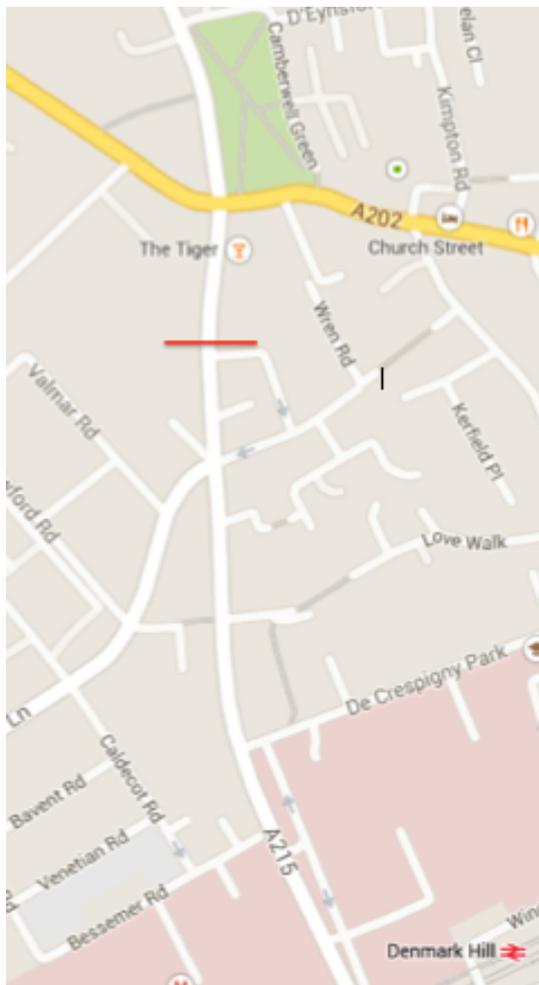
2.4 Data Analysis

The data collected by each student group was first analysed at the high street level for initial presentations to Southwark Council. Subsequently the complete dataset was compiled, cleaned and reanalysed to produce the comparative reports now supplied.

3. Footfall count & survey locations

3.1 Denmark Hill, Camberwell

Figure 1: Location of Camberwell footfall count

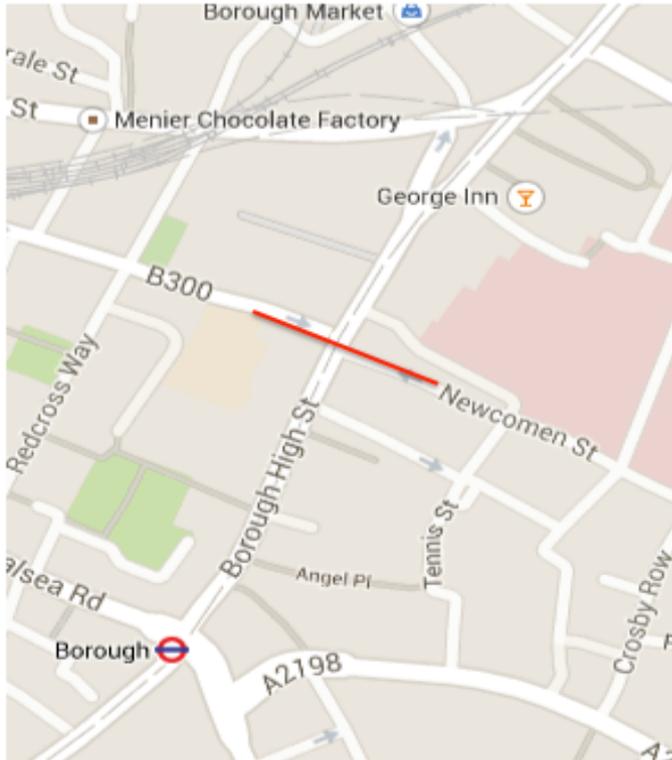


Survey Cover: From Camberwell Green to Denmark Hill Station

Footfall Count: A line drawn from Costa Coffee across Denmark Hill to the corner of Orpheus Street next to the Post Office.

3.2 Borough High Street

Figure 2: Location of Borough High Street footfall count

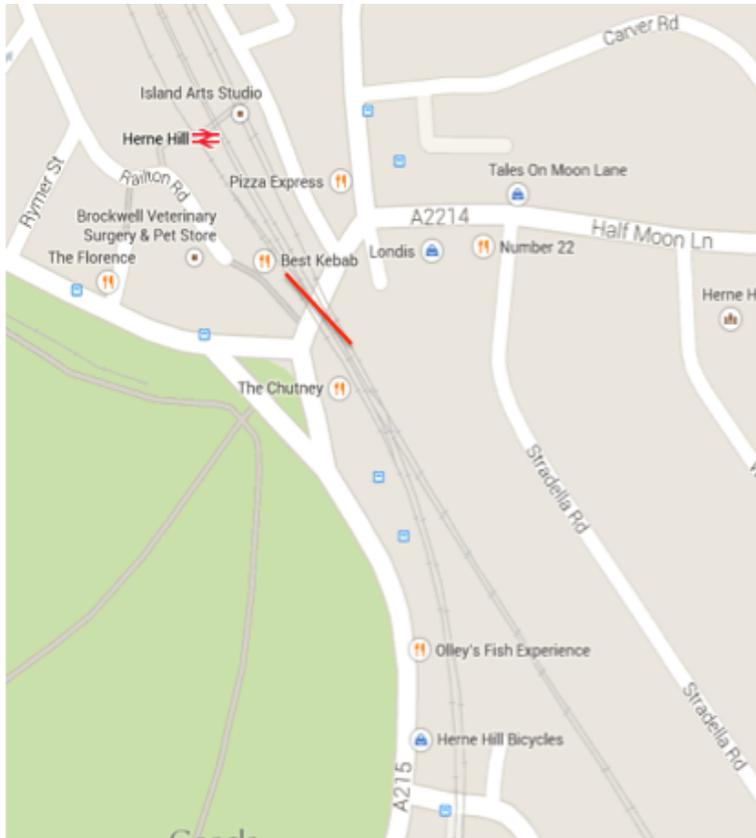


Survey cover: Borough High Street from Lant Street to Borough Market

Footfall count: Corner of Newcomen Street across to the corner of Union Street.

3.3 Herne Hill

Figure 3: Location of Herne Hill Study

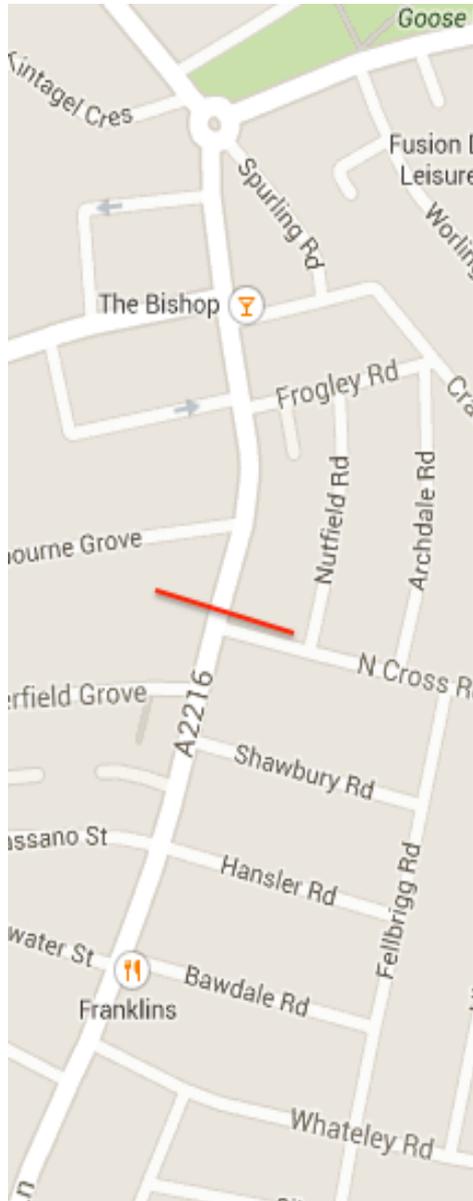


Survey area: From Stradella Road on Half Moon Lane round and up to Croxted Road on Norwood Road (including Herne Hill Market area).

Footfall count: Under the railway bridge, next to Bleu, on each side of the road as indicated.

3.4 Lordship Lane

Figure 4: Location of the Lordship Lane Study

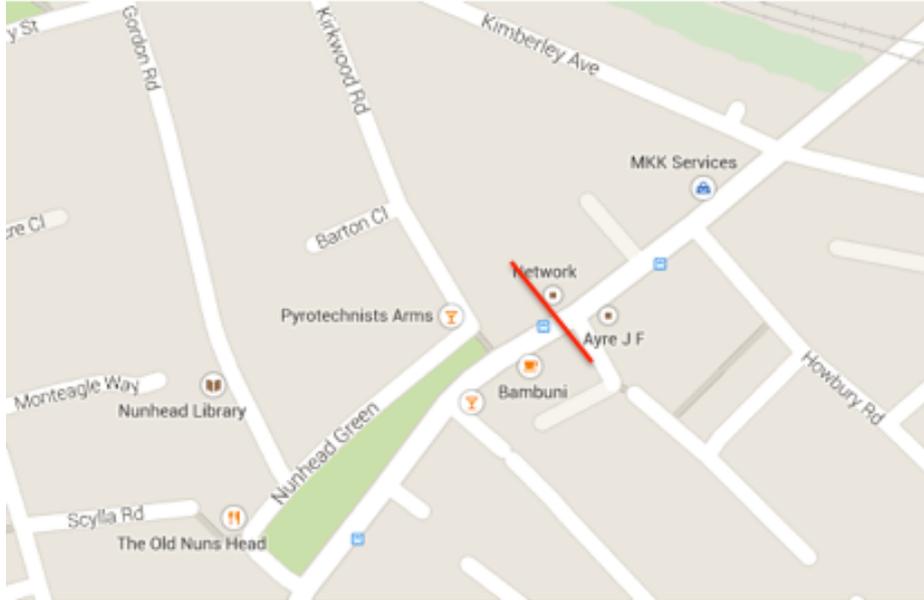


Survey Location: From Goose Green to Whateley Road

Footfall position: On a line between The Palmerston Pub & Dulwich Dental Clinic.

3.5 Nunhead Lane

Figure 5: Location of Nunhead Lane Study

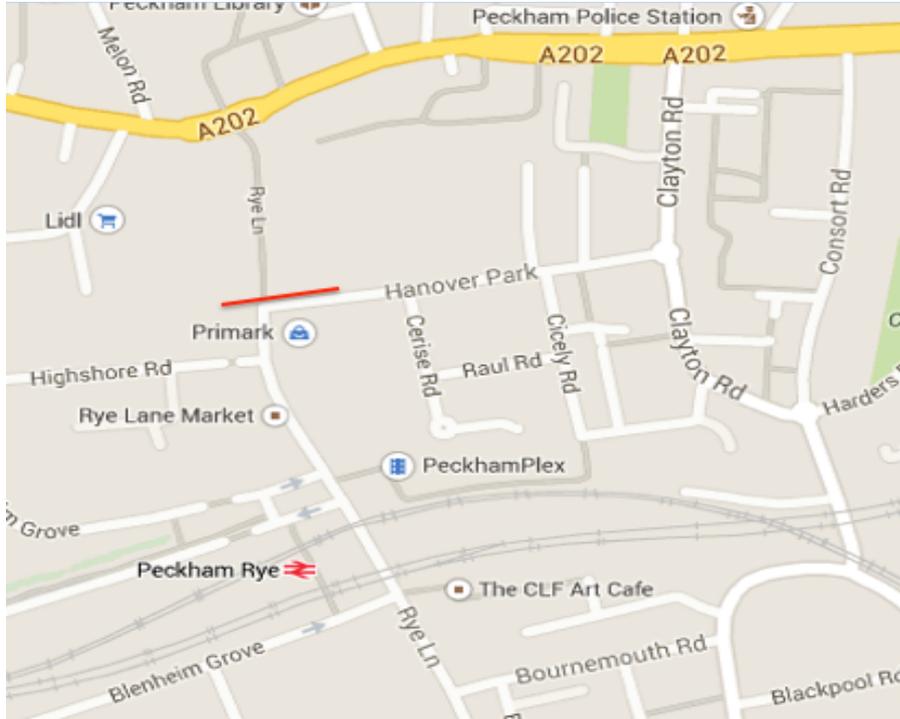


Survey area; Nunhead Lane / Evelina Road from Nunhead Green to Kimberley Avenue

Footfall observation point: A line drawn from William Hill across to the corner of Barsest Road.

3.6 Peckham Rye

Figure 6: Location of the Peckham Rye study

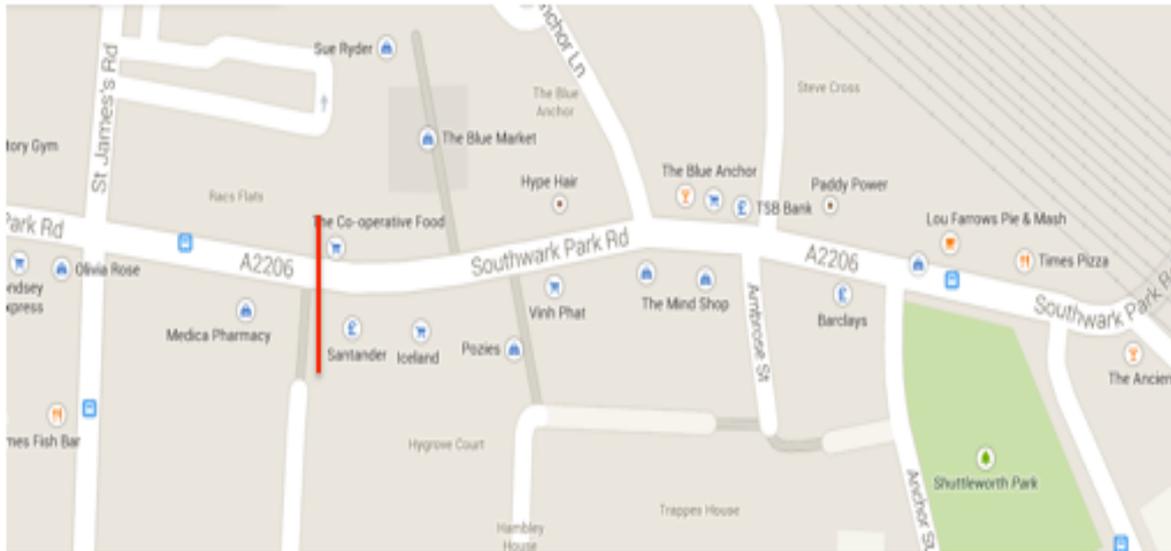


Survey Location: Peckham High Street from Consort Road then around the corner to Rye Lane and up to Blenheim Grove.

Footfall observation points: Across a line drawn from the corner of Hanover Park (HSBC) to the alley opposite.

3.7 Southwark Park Road

Figure 1: Location of the Southwark Park Road study



Survey Location: Southwark Park Road from St James Road to Anchor Street

Footfall Observations: A line drawn from the corner of the Santander bank across to the Co-operative shop window.

3.8 Walworth Road

Figure 1: Location of the Walworth Road study



Survey Location: Walworth Road from Browning Street (McDonalds) to Liverpool Grove.

Footfall position: A line drawn between Natwest across to Foot Locker.