Southwark Council

Southwark high streets: **Borough High Street**

www.southwark.gov.uk

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1. Introduction

This report provides the analysis of the retail audit, footfall observations and interviews conducted on Tuesday 10th and Saturday 14th February 2015 on Borough High Street.

1.1 Summary of Findings

The Retail Mix: The High Street retail mix is skewed very strongly towards foodservice and to financial services: these outlets are available at twice the Southwark average. The result is that grocery retailers are fewer than expected, although this may be because of the central presence of Borough Market, a strong competitor, albeit a specialist one. The area is also light on comparison goods retail.

The People on Borough High Street: The available consumers are relatively young, likely to work locally but live much further afield and to be reasonably affluent. More than the average proportion is in work, largely in secretarial or administrative occupations. They are likely to rent their home, have a university education, and be single or cohabiting. They typically arrive on the high street by foot tube or train, and they spend more time and money than the overall average on coffee, food and drink. They also visit rather less frequently than expected.

Footfall Densities: The footfalls on Borough High Street are among the highest observed in this study and on average they reach 1600 people per hour. Saturday is busier than Tuesday but less concentrated into a lunchtime peak.

Attitude & Usage: The main motivation for being on the high street is to patronise a specific business (largely the market) the choice of food and drink outlets available, and the environment. This is different from most other high streets in the borough, which are visited for convenience. Borough High Street is a draw in its own right especially at the weekends.

Marketing interventions to date have had some effect. There is awareness of the local area as a cultural district, and the wide range of commercial cultural events on offer. These are each independent draws to the South Bank, and might result in a combined visit which could include Borough Market and the local area. But a larger part of the target market remains those who work locally, and local businesses should not lose sight of their need for fast service, convenience and quality – any business that provides this will draw more trade.

The uptake of marketing promotions, especially digital marketing tools, is about average but 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.

2. The Retail Mix

The mix of different types of retail outlet on any high street characterises the nature of the shopping experience and is believed to affect footfall densities in regard to the diversity of the offer (the number of different categories of offer available), the quality or attractiveness of those offers, and their concentration. In addition, certain categories of retail draw in trade because they are strongly branded or because, like some multiple grocery retail with high street parking, they can become a destination store.

Whereas the mix of store types in a shopping mall is usually defined by one owner, on the high street the retail mix is rather harder to control and to adjust, although of course some classes of business require planning permission or licencing. As a result, high street footfalls may decrease as a result of an evolving sub-optimal retail mix.

Table 1: Retail mix comparison; Borough High Street

	Borough High St	Survey Average %
Number of Stores:	86	80
Foodservice *Restaurants, Cafes, Coffee Shops*	51	25
Financial Services *Banks, Building Societies, Post Office, Loan Shops*	22	11
Mixed Non-Food Retail *Clothing, Shoes Accessories, DIY, Toys*	9	25
Personal Care *Hairdressing, Beauty/Tanning shops, Doctors*	5	13
Technology *Phone Shops, PC repairs, Electricals*	0	4
Entertainment *Betting Shops, Libraries*	5	4
Grocery *Multiple & specialist independent retail*	8	17
	100	100

An ad hoc audit was taken of the retail stores on the high streets identified in the study, and organised into 26 pre-defined categories. In the analysis these categories were further reduced into the seven identified in Table 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.

Table 1 compares the number and types of stores identified on Borough High Street with the distribution seen across all the high streets in the study. In total 86 different businesses were counted in this section of the high street. This is just beyond the average of the eight centres studied. Of the 26 categories in the analysis 21 were represented, giving a diversity index of 0.81.

The retail mix is skewed strongly towards foodservice with restaurants, takeaways and coffee shops well represented. Financial services also score highly, at twice the average. With the exception of betting shops, all other categories are running at about half the survey average: in short, Borough High Street is very strongly geared towards a lunchtime trade, and offers a wide variety of eat-in and take away foodservice. This reflects the nature of the area, which is both a business district and a tourist location.

The centre is extremely well connected and the gateway to the City of London. It is also home to the Borough Market development, and a number of cultural attractions. Missing or under-represented categories on this stretch of high street include:

- Comparison goods retail
- Garage
- Technology (although there are several shops in this category nearby)
-

3. Respondent Demographics

The students interviewed 103 respondents over two days, Tuesday and Saturday. The demographic make-up of the sample is described in this section, and compared with the Southwark population and with the overall survey results.

Table 2: Demographics

n = 103	Average %	Borough %
18 – 24	18	26
25 – 34	30	39
35 - 44	23	15
45 – 54	15	12
55 – 64	7	7
65 – 74	5	2
75 or older	2	0
Male	47	43
Female	53	57

The population of Southwark is young with 42% aged between 20 and 39 (against 35% in London). Between 50 and 64 it is close to the London average (13% against 14%), and over 65's are under-represented (8% against 11%). It is evenly divided by gender.

Table 2 compares the population banding across the entire survey with the respondents on Borough High Street. The people on the high street were younger even than the borough demographic with around two thirds aged under 34. Older groups appeared to be under represented on the street.

Table 3: Ethnicity Overview

	Average %	Southwark %	Borough %
White	61	54	73
Black	19	26	3
Asian	8	10	10
Mixed	9	6	15
Other	1	3	0

In terms of ethnicity, Table 3 compares the respondents on Borough High Street with the survey averages and with Southwark population data. The visitors to Borough were very substantially more likely than average to be of broadly white or mixed ethnicities. A pronounced bias was also seen In terms of education; the Borough sample was better educated than the average for Southwark, with nearly 70% having attained a university degree.

Table 4: Education

	Average %	Borough %
Compulsory Education at School	**14**	10
Vocational or College or 6th Form	**31**	21
University	**55**	69

Visitors also demonstrated a skew in occupation types (Table 5) away from the borough averages with only 10% not currently working, and rather higher than average proportions of most other occupations present in the sample, particularly of administrative and secretarial.

Table 5: Occupation

	Average	**Borough**
	%	%
Professional occupations	20	**22**
Sales and customer service occupations	17	**18**
Administrative and secretarial occupations	8	**13**
Caring, leisure and other service occupations	10	**12**
Managers, directors and senior officials	10	**11**
Not currently working	23	**10**
Associate professional and technical occupations	4	**5**
Skilled trades occupations	6	**5**
Elementary occupations	2	**3**
Process, plant and machine operatives	2	**2**

The typical Borough visitor is slightly more likely to be single or living with a partner, although four out of ten still live in single occupancy homes. The proportion of children in the household is lower than average for the borough (Table 6).

Table 6: Household Structure

	Average	**Borough**
	%	**%**
Single	41	**44**
Married	35	**31**
Civil Partnership	2	**2**
Living with partner	12	**17**
Divorced	4	**2**
Widowed	2	**2**
Separated	2	**1**
Number of Adults in the home:		
1	28	**18**
2	51	**53**
3	13	**17**
4 +	7	**12**
Number of 13-17s in the home:		
0	81	**86**
1	12	**8**
2 +	7	**6**
Children under 13:		
0	78	**83**
1	13	**6**
2	7	**7**
3 +	2	**5**

Finally, Table 7 describes the ways in which the survey respondents occupy their homes. 58% are in rented accommodation, which is considerably higher than the Southwark average, and a further 28% are buying, which is just below the average level. Passers-by on Borough High street were therefore found to be somewhat affluent and younger than expected.

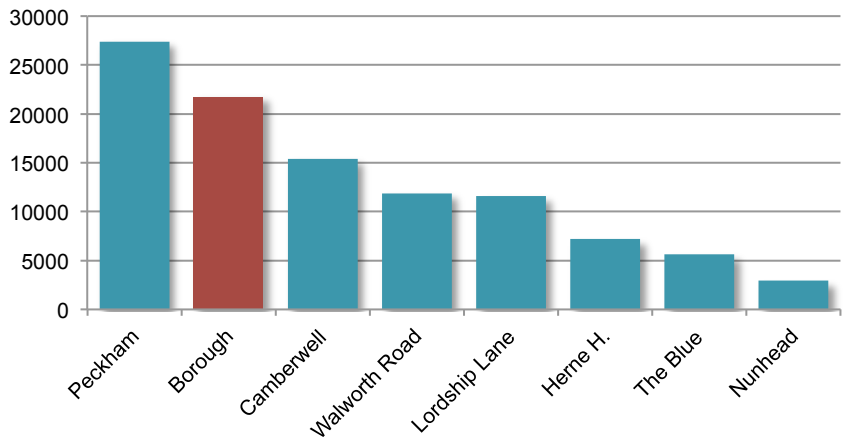
Table 7: Household Occupation

	Average %	Borough %
Rent	52	58
Own it outright or with a mortgage	31	28
Shared ownership or Housing Association	6	3
Live there rent free	5	5
Other/ No response	7	6

4. Footfall Distributions

Borough High Street is among the busier high streets observed. Over the course of two days nearly 22,000 pedestrians were counted passing on either side of the street. This amounts to an average footfall density of 1600 people per hour, comparable with the peak flow at some moderately busy West End locations such as Marylebone High Street.[1] Figure 1 compares the footfall at Borough with the eight high streets in the study. Peckham Rye and Camberwell have higher densities, but are both somewhat different in character.

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



[1] The Retail Group Marylebone High Street 2013 Health Check Report. Available at: http://transact.westminster.gov.uk/docstores/publications_store/05_Final_Marylebone_HighSt_HC_Dec13.pdf

4.1 Weekend & Weekday Ratio

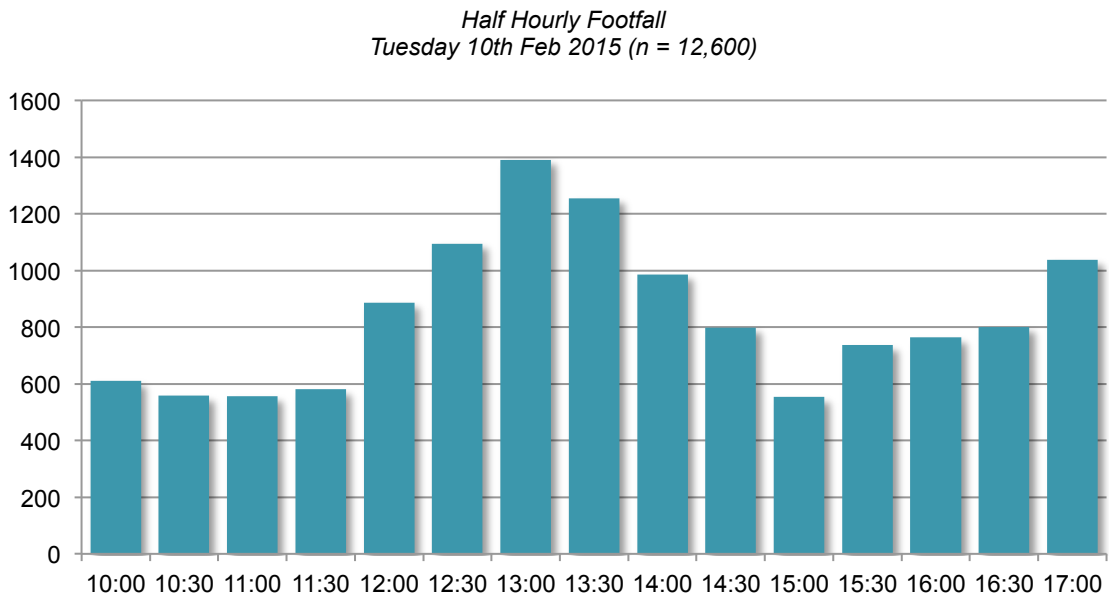
Table 8 highlights the density ratio between Saturday and Tuesday. On Borough High Street, unlike some other centres in Southwark, it appears that the ratio remains relatively constant between the two days.

Table 8: Comparative footfall by day: February 2015

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

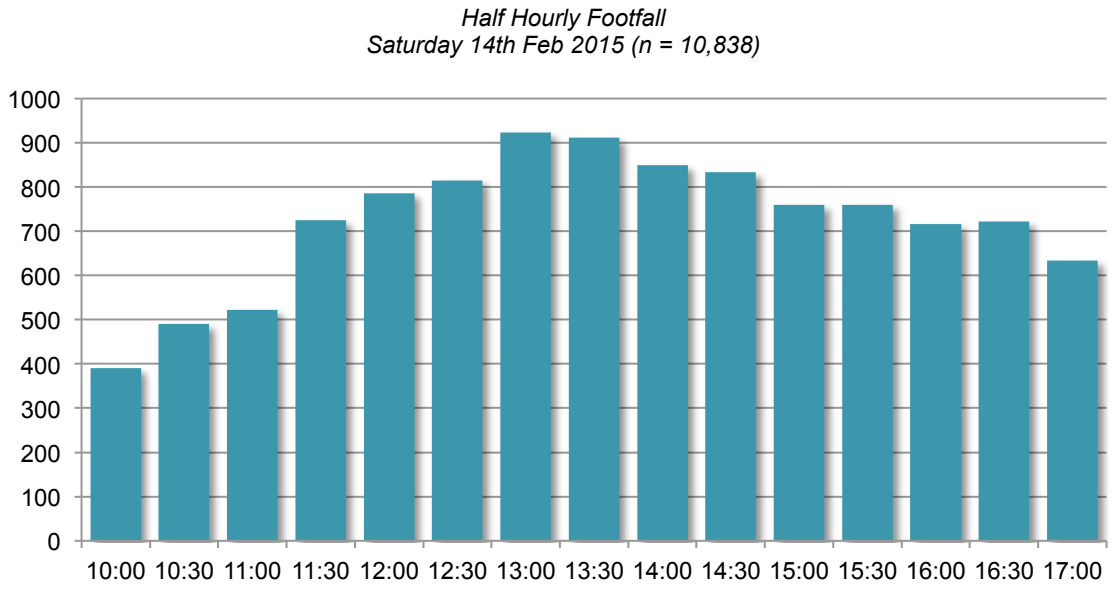
	Tuesday	Saturday	Total	Average Hour
Peckham (Rye Lane)	10778	16599	27377	1900
Borough High Street	11569	10204	21773	1600
Camberwell	**7759**	**7637**	**15396**	**1100**
Walworth Road	5527	6369	11896	850
Lordship Lane	2954	8645	11599	830
Herne Hill	2851	4330	7181	500
The Blue	2677	2945	5622	400
Nunhead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

4.2 Footfall Count: Tuesday



On Tuesday the footfall count reveals a very clear lunchtime peak which builds from 12.00 noon and lasts until 14.30. Trade falls off to below morning levels before building once again to the end of the day.

4.3 Footfall Count: Saturday



On Saturday, by contrast the peak density is an hour later and declines far more slowly across the day, so that the afternoon remains almost twice as busy as the morning.

5. High Street Catchment Area, Travel Time & Method

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

Uniquely among the eight high streets Borough shoppers are not nearly so locally concentrated. On most other high streets around half or slightly more respondents were found to live locally. Here the local visitors amount to just over a quarter and the remaining respondents came from far more widely dispersed locations.

The number of postcodes collected on Borough High Street is almost double the number collected in any of the other locations, an indication of the size of the catchment here.

Respondents were largely happy to provide at least the first part of their postcode and response rates to the question on this basis were on average over 90%. Rather fewer were willing to supply a full code; it is not possible to drill further into the catchment area with any confidence.

The catchment data is shown in Table 9.

Table 9: Catchment Area

Borough	%
SE1	28
E2	5
SE10	4
SE15	4
SE16	4
CR0	2
N7	2
NW1	2
SE14	2
SE4	2
SW4	2
AL7	1
DE13	1
E10	1
E14	1
E18	1
E8	1
LS4	1
N1	1
N2	1
N4	1
NW9	1
PE6	1
S35	1
SE12	1
SE17	1
SE2	1
SE21	1
SE25	1
SE26	1
SE5	1
SE6	1
SG17	1
SL5	1
SM1	1
SS12	1
SW1	1
SW11	1
SW12	1
SW14	1
SW7	1
SW8	1
TN1	1
W11	1
WC1	1
WD17	1

5.1 How local?

Being "local" is an important perception in relation to the most frequent choice of high street destination. In Table 10 the response to the question "Do you live or work locally" shows that two thirds of the visitors interviewed considered themselves to be local to Borough High Street by virtue of where they lived or worked. The proportion claiming to live locally is however thirty points below the average for the total survey, while working locally was rather higher. Travel time ***for almost all*** was under an hour, with half spending less than 30 minutes travelling there.

Table 10: How Local?

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

	Average %	Borough %
Living Locally	52	22
Working Locally	14	27
Both	17	17
Those who travelled...		
Less than 30 minutes	74	55
Between half & one hour	22	35
1 to 2 hours	3	8
Over 2 hours	1	2

Visitors to Borough are less likely *to live nearby*.

5.2 How did they get here?

Table 13 helps to confirm the picture of the typical visitor as being less local since only a third had come to the high street on foot, but the street is extremely well connected and accessible so a quarter came by tube and a further 16% by train both substantially above average. Fewer than expected had travelled on a bus or by car.

Table 11: Transport

What was your main form of travel to get here today?

	Average %	Borough %
Walk	48	**30**
Tube	5	**27**
Train	6	**16**
Bus	22	**14**
Cycle	6	**8**
Car	11	**3**
Taxi	1	**3**
Other	0	**0**

- almost two thirds arrive ***on foot, or by tube or train***

6. Consumer Behaviour

6.1 Frequency and Dwell Time

The survey established the frequency with which visitors came to Borough High Street and how long they stayed. These values were compared with the total responses to identify some characteristic features of visitor behaviour at the location.

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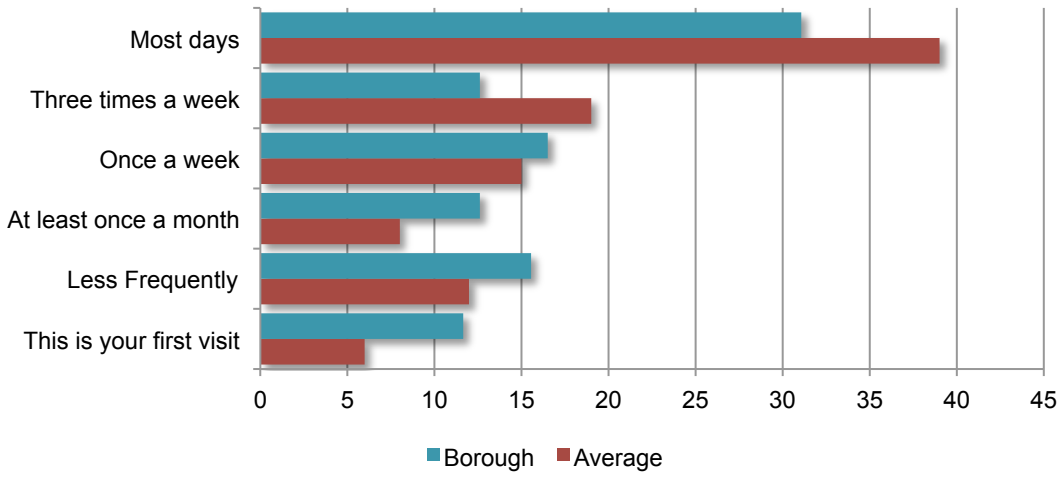
Figure 4 reveals that frequency of visit is below average for Southwark, with only about three quarters of the expected level of daily users. About half of the respondents stop here once a week or less, and in proportions greater than the average. To make sense of these numbers it is also important to ascertain the duration of these visits.

Figure 4: Frequency of Visit

"How often do you visit this high street?"



Respondents were asked how long they intended to stay on the high street, and Table 12 indicates that visits to Borough are most likely to be longer than average. A quarter of respondents intended to be there for between two and four hours, substantially beyond the norm. Shorter visits, while common elsewhere, are not as usual.

These values contrast somewhat favourably with average dwell times recorded at Westfield White City, where visitors spend two hours thirty five minutes on an average trip[2], and with other Southwark high streets – where dwell times are far shorter.

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

Table 12: Dwell Time

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

	Average	Borough High St.
Up to 15 minutes	22	17
15 – 30 minutes	26	17
30 minutes – 1 hour	21	24
1 – 2 hours	17	17
2 – 3 hours	4	6
3 – 4 hours	2	4
More than 4 hours	8	16

Borough is a destination trip for many.

6.2 Intended purpose of visit

Respondents were asked what "the main purpose of their visit was today". Only 20% said they were shopping, 29% claimed to be passing through, 26% intended to eat, drink or meet friends, and 10% were doing "something else".

Since most high street visits are unlikely to be for a single purpose we also then asked what else they would be doing: on that basis the combined scores in Table 13 probably give a more accurate representation of the intended purpose of the visit and the use of the services on offer. 44% then said they would be shopping (still far below the average). But three quarters intended to visit a restaurant, café, pub or takeaway, or to meet friends which is one and a half times what is seen elsewhere. 20% were attending to their finances, again a higher than expected proportion, while half were passing through.

Borough High Street therefore has a rather different character, since pedestrians are not shopping so much as grazing here. Others are on their way to visit local attractions or simply hurrying back to work.

Table 13: Main & Secondary Intended Purpose.
What is the main purpose of your visit to this town centre today?
Apart from […..], what else will you be doing here today?

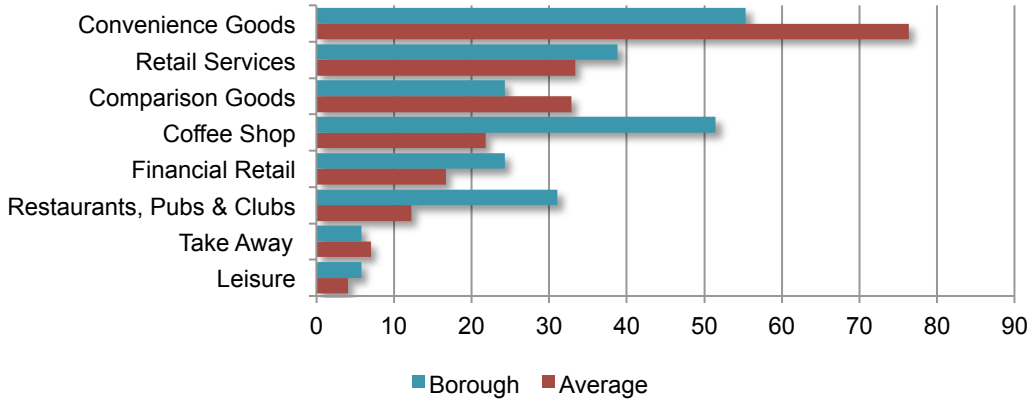
Purpose of Visit Main & Secondary	Average %	Borough %
Shopping	**45**	20
	30	23
	75	***44***
Travelling through	**23**	*29*
	23	21
	46	***51***
Eating, Drinking, Leisure	**18**	26
	35	50
	53	***76***
Fitnesss, Health, Finance	**6**	*15*
	8	5
	14	***20***
Other	**8**	10
	4	0
	12	***10***

Less than half are shopping today.

6.3 Which of these have you visited or shopped in today?

In addition to the intention questions reported in Table 13, respondents were asked to state where they had visited or spent money, and the responses are shown in Figure 5.

Figure 5: What have you visited or spent money on today?



The figure confirms the respondents intentions showing a far higher incidence of visits to foodservice establishments and financial outlets than is seen elsewhere. The behaviour is consistent with leisure usage and with lunch break refuelling.

6.4 Claimed Average Spend

Table 14 indicates that the average intended or claimed spend is higher than average, with fewer spending £10.00 or less and rather more in the £20 to £30 band. The higher brackets are less well populated than average.

Borough is therefore benefitting three times – from higher than average visitor numbers, higher than average dwell times and a higher average spend.

Table 14: Claimed Average Spend

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

	Average	Borough High St.
	%	%
Less than £10	32	29
£10 - £20	29	29
£20 - £30	16	22
£30 - £40	10	11
£40 - £50	7	4
£50 - £70	4	2
More than £70	3	3

Average Spend is higher than normal.

6.5 Where else do you go shopping?

Footfall density on any high street is a matter of competition, since consumers can choose from a wide variety of locations within and beyond the borough for a number of purposes. The study has identified that dwell times and spends are higher than average on a number of Southwark high streets but visit frequencies are lower, because they are destination locations, perhaps for a market or for a range of comparison goods retailers. Borough High Street appears to draw many of its visitors for the foodservice, or its market, and it seems to fit this description as a destination centre.

Table 15: Duplication of High Streets

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

(n = 103)	Borough	%
West End	38	37
Shoreditch	9	9
Westfield Stratford	6	6
Clapham	4	4
Elephant & Castle	6	6
Peckham	3	3
Croydon	2	2
Greenwich	2	2
New Cross	2	2
Peterborough	2	2
Total		72
29 alternatives		

Table 15 indicates the biggest high streets with which Borough is competing for footfall. The top two named locations draw nearly 50% of the shoppers – the West End and Shoreditch. Both offer a wide choice and variety of speciality foods and fashion and other retail offers. Following these two named competing locations, the number of respondents identifying any other particular destination declines rapidly, and the destinations become more "local". The total list of alternatives is long, reaching 29, yet almost half the switching is accounted for in just two choices. This is a familiar pattern in retail gravitation models where the busiest locations with the easiest access are the biggest competitors. Most Borough shoppers can also be found anywhere that offers variety and is easy to reach. It poses interesting questions about how Borough retailers compete for their affluent market – because they must keep the location top of mind for three quarters of the visitors drawn from a wider catchment.

6.6 Consumer Behaviour: summary

The Borough High Street shopper is somewhat likely to live locally, but rather more likely to work nearby. During the week they frequent the foodservice and financial providers mostly in a narrow window around lunchtime. Less than half "go shopping". Other visitors at quieter times of the day and at weekends come from further afield, visit less frequently but for longer than the average stay. They largely spend up to £30 each time, more than expected.

7. Attitudes to the High Street

Consumer behaviour may be shaped by attitudes and so the survey investigated how high street visitors judged the experience on Borough High Street.

In Table 16 the attributes that most attract the visitors are identified. The table is ordered by the average Southwark results, and it can be seen that Borough scores very strongly on food and drink, the environment and the market, which is obviously a key motivating factor. After that, few came for the shops.

This might then indicate a way for individual retailers to compete for available footfall since visitors appear to be expressing a *singleness of mind* about the facilities. On this basis any retailer or café that stands out through exceptional quality or service might then draw more trade individually and to the high street if it becomes famous.

Table 16: What's good….?

What most attracts you to this town centre?

	Average	Borough
	%	%
Proximity or Convenience	47	33
Range of shops	21	13
Range of places to eat or drink	10	17
Attractive environment	7	9
A specific retailer or service	4	12
Ease of Parking	2	2
Other	10	15

When asked specifically what they thought might be improved or what they felt was missing, the biggest gripe, as reported in Table 17, was the lack of choice in retail shops – and its an important gripe because no other comment comes close.

Table 17: What's bad…..?

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

	Borough	
Respondents	*103*	
A Wider Range of Stores	32	31%
Bars & Pubs	7	7%
Variety of Restaurants	6	6%
Leisure Activities	6	6%
Parks & Green Space	4	4%
Transportation & Public Realm	3	3%
Gyms	3	3%
Cafes	2	2%
Cinema	2	2%
Parking	1	1%
Bank/ATM	0	0%
Social & Community	0	0%
Police Station	0	0%

8. Marketing Effectiveness

What can local businesses do to reach their target market either individually or as a community? In the final section of the shopper survey we asked respondents about their awareness of various advertising channels and messages, about their community engagement, and about their use of marketing promotions including coupons and digital mechanics.

Table 18: Local Media Reach
Where do you mainly get your local news from?

	Average %	Borough %
TV	**32**	41
Other (Traditional)	**8**	16
Word of Mouth	**15**	15
South London Press	**7**	15
Other Online	**15**	5
Southwark News	**7**	4
S.E.1 Magazine	**2**	2
Southwark & Bermondsey News	**2**	1
Southwark Life Magazine	**1**	1
Radio	**8**	0
Southwark Business Today	**0**	0

8.1 Media Reach

The survey asked respondents to name their main source of local news as an open-ended question in order to test unprompted media awareness. Table 18 is ordered by the responses in Borough High Street and compares these with the survey averages. The strong response for TV is probably unhelpful, apart from emphasising its reach for mainstream advertisers, but the table provides some useful insights.

The first is the continuing strength of local press: over a third of respondents claim to use one or other of the main local papers for information. Online is low reach at 5% and it is fragmented, covering various social media including twitter and Facebook as well as local community websites. By far the broadest reach is through the South London Press (15%).

Word of Mouth was recognised as an information source: it is possible that WoM or *e*-WoM are important sources of information in a context in which Borough is destination shopped by people from a wide area.

Table 19: Local Advertising Recall

"Have you seen any advertising for local events recently?" Which events?"

	Borough
(n = 103)	%
Yes	28
When Prompted:	
Music events	2
Alexander McQueen Exhibition	2
Bands	2
School Events	2
Southwark Roundhouse	2
Billboards advertising music	1
Cinema nights at pubs	1
Comedy Club	1
Concert	1
Festival Hall	1
Karaoke in pubs	1
Future Fest in March	1
Gallery launch in Camberwell	1
Goldsmiths events	1
Milkshakes event at Ministry	1
Arts Events	1
Saving trees	1
Poetry recitals in local cafe	1
Pub Quiz	1
University productions	1
Women of the World Festival	1
Art music performance	1

8.2 Advertising Recall

Unprompted recall of advertising for local events was then tested. Scores were reasonably high: about 28% could recall such advertising, and were then prompted to describe it. Table 19 lists the various responses, which are then however individually low. The named events and their advertising may have been separated in time by a few months and memories decay, but the list still reflects a mix of some business activities and cultural and community driven events. They are more widely spread around the cultural quarters of Southwark, rather than being focussed on Borough High Street.

8.3 Community Engagement

When asked to recall any community or local events they had attended in the past year, the response was also fairly high: around 40%.

The question prompted a similar list of events from respondents, with many having attended the commercial theatre or music events on the South Bank and at the Old Vic. The festival also attracted a good response, but "local" events was often interpreted to mean local to home in the wider catchment area.

Table 20: Community Engagement

"Which local events have you attended in the past year?"

	Borough
(n = 103)	
Theatre- Old Vic	6
Gigs	5
A few fundraisings	4
Local pub quiz	3
South Bank Festival	3
Theatre - Goldsmiths	2
Theatre- National	2
Concerts	2
Events at local galleries	2
Borough market event	1
Children's play at school	1
Fireworks	1
Tate Modern	1
Fun run for British Heart Foundation	1
Karaoke in local pubs	1
Local Football Matches	1
Pantomime	1
Poetry Recital	1
Southwark Cathedral choir	1
Ministry of Sound	1
Total	40
No response	**63**

8.4 Promotional Reach

Finally Table 21 indicates an average engagement with promotional marketing tools either online or traditional. More than average numbers had used locator apps, but this is not surprising if the visit was the first one to an unfamiliar destination.

Otherwise some had used online promotions and traditional coupons.

Table 21: Promotional Reach

Have you used any of the following today?

	Average %	Borough High Street %
Coupons	7	6
Social media promotiom	7	5
EmailPromotion	6	3
Store Locator	4	8
Service Locator apps	4	8
Voucher apps	3	3
QR Codes	2	1
Total	32	33

10. Conclusion

The data collected in Borough High Street lead us to conclude the following:

- **Footfall density is high, and follows a weekday/weekend pattern.** On average *1600 people per hour* pass up or down Borough High Street, which is high in relation to other Southwark high streets, and comparable with bust West End locations. Saturday represents the stronger trading opportunity being busier than Tuesday and steadier over the afternoon. Tuesday shows a dramatic lunchtime peak, and the intimation of a similar evening rush.

- **Fewer local customers, spending more time & money.** The catchment for Borough High Street is about twice as wide as any other location observed, and the centre attracts about half as many strictly local shoppers. Many are local by dint of the fact that they work nearby, but the main reason to be on the street is food and drink – passers by are very largely grazing rather than shopping. They are also visiting financial services – in fact making the best use they can of their breaks from work. They are younger, more affluent and probably in a hurry during the week. On Saturday they are there for the market and other local amenities.

- **Relationship building.** The nature of the customer base is split: the visit frequency indicates a lower than average use of the high street, but those that work locally visit frequently – otherwise the users are occasional visitors. This creates an opportunity for independent businesses to stand out by building personal relationships with their frequent and regular shoppers. The relationships might be service-based, founded on the understanding that consumers are likely to be in a hurry; or product based matching the offer more closely to the needs and wants of the top-up shopper. For the market and for other attractions, the marketing need is to keep the whole location salient as a rewarding afternoon out. Return visits are likely – 15% or so visit less than once a month, but they are returning. At this frequency a reminder would be useful, particularly at key dates such as Christmas or Easter.

- **Be distinctive.** Being distinctive serves to attract both local and visitor target markets – distinctive offers which are memorable through great service or exceptional quality and value attract more people more often. The unique atmosphere of Borough Market, and its individual merchants can work the same way – great food is available across London, but not in quite this setting. The competition with other locations is intense so action is needed to remind and nudge those who have been before and to inform those who haven't.

- **Two markets.** The customer base is split, and a great deal of the sales opportunity occurs on the five weekdays. But both markets are drawn to the food and drink offers – the brand image for the location - and this "positioning" can be enhanced and reinforced over time, and appeals to both workers and visitors.