Southwark high streets: **Southwark Park Road**

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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 Southwark Park Road.

1.1 Summary of Findings

The Retail Mix: The Southwark Park Road shopping area is very diverse but skewed towards comparison goods personal services and leisure (mostly betting shops). It features convenience stores, banking and other services as well as take-away outlets and coffee shops. There are some national supermarket brands on the high street. Despite the richness of the offer, most named a large comparison goods retail centre as their alternative shopping destination.

The People on Southwark Park Road: The available consumers are older than average, more likely to be in family units, and in rented or housing association accommodation, and more likely than average to not be working. For the most part they live or work locally, or both. They typically arrive on the high street by foot or on the bus, and spend a relatively short time and little money there, mostly conducting top-up shopping.

Footfall Densities: The footfalls on Southwark Park Road are among the lowest observed in this study and on average they reach 400 people per hour. Saturday and Tuesday are similar in the amount of passing trade with a post lunchtime peak on Tuesday that is slightly extended on Saturday and lasts until 3.00.

Consumer Behaviour: The visitors to Southwark Park Road come frequently – every day or every other day. They spend a short amount of time but less than the average sum of money on each occasion, mostly between £10 and £20. Most will spend something, whatever other reason they have for being there, usually passing through.

Attitude & Usage: The main motivation for being on the high street is convenience: few visit to patronise a specific business, and the main comment, strongly expressed is that the choice of shops is limited. This creates a useful context to market any specific existing business since expectations are low, and therefore an investment in becoming distinctive would surely pay off. For the area as a whole there is little community feeling identified, but given the highly local nature of the visitors this could be developed to the benefit of overall footfall levels.

Marketing interventions to date have had negligible effect. There is low awareness of local advertising and of some local events, but it is hardly pronounced. The main channels through which the population can be reached remain traditional local press. There is some awareness and usage of online bulletin boards.

The uptake of marketing promotions, especially digital marketing tools, is extremely low. Just 8% of respondents said they would be using a coupon on the day, while penetration of other mechanics was substantially lower.

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; Southwark Park Road

	Southwark Park Rd	Average %
Number of Stores:	**73**	**80**
	%	%
Foodservice *Restaurants, Cafes, Coffee Shops*	12	25
Financial Services *Banks, Building Societies, Post Office, Loan Shops*	12	11
Mixed Non-Food Retail *Clothing, Shoes Accessories, DIY, Toys*	25	25
Personal Care *Hairdressing, Beauty/Tanning shops, Doctors*	16	13
Technology *Phone Shops, PC repairs, Electricals*	4	4
Entertainment *Betting Shops, Libraries*	10	4
Grocery *Multiple & specialist independent retail*	21	17
	100	100

Southwark Park Road has **more personal care & betting shops**

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 1 which compares the number and types of stores identified on Southwark Park Road with the distribution seen across all the high streets in the study. In total 73 different businesses were counted on both sides of the street in this section of the retail centre. This is close to the average of the eight centres studied. Of the 26 categories in the analysis 24 were represented on Southwark Park Road, giving a diversity index of 0.92, the highest in the borough.

The retail mix is skewed towards personal care and entertainment with rather more than the average proportions of hairdressing and tanning salons, and also bookmakers. The provision of restaurants, takeaways and coffee shops is below average, while several grocery multiple brands are present.

Southwark Park Road also contains a market, The Blue, but is almost the quietest site in the study.

3. Respondent Demographics

The students interviewed 98 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 = 98	Average %	Southwark Park Road %
18 – 24	18	13
25 – 34	30	19
35 - 44	23	31
45 – 54	15	17
55 – 64	7	6
65 – 74	5	7
75 or older	2	6
Male	47	45
Female	53	55

A rather older than average population..

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 Southwark Park Road. We found the younger groups (18-34) to be extremely under represented, in aggregate 32% of the sample against an expected 48%. The visitors to this retail centre appear therefore to be older than the average and atypical of the wider population.

Table 3: Ethnicity Overview

(n = 98)	Average %	Southwark %	Southwark Park Road %
White	**61**	**54**	68
Black	**19**	**26**	16
Asian	**8**	**10**	5
Mixed	**9**	**6**	7
Other	**1**	**3**	3

In terms of ethnicity, Table 3 compares the respondents in Southwark Park Road with the survey averages and with Southwark population data. The visitors to the area were rather more likely than average to fall into broadly white categories, and almost half as likely to be of black or asian ethnicities. In terms of education, the sample had lower attainment than the average with half the expected levels having achieved a university degree.

Table 4: Education

(n = 98)	Average %	Southwark Park Road %
Compulsory Education at School	**14**	36
Vocational or College or 6th Form	**31**	41
University	**55**	23

Visitors to Southwark Park Road are 50% more likely than average not to be in work, and a third as likely to have a managerial or professional occupation. Those in work hold positions in sales, service occupations and in skilled trades.

Table 5: Occupation

(n = 98)	Average %	Southwark Pk Rd %
Not currently working	23	**36**
Sales and customer service occupations	17	**20**
Skilled trades occupations	6	**12**
Caring, leisure and other service occupations	10	**12**
Professional occupations	20	**11**
Administrative and secretarial occupations	8	**5**
Managers, directors and senior officials	10	**1**
Associate professional and technical occupations	4	**1**
Elementary occupations	2	**1**
Process, plant and machine operatives	2	**0**

A third are not currently working

The population on Southwark Park Road is slightly more likely to be married than expected, and to have two or more older children living at home. The Bermondsey population seems to contain rather more established and older families than average for Southwark.

Table 6: Household Structure

(n = 98)	Average %	**Southwark Pk Rd %**
Single	41	**42**
Married	35	**41**
Civil Partnership	2	**0**
Living with partner	12	**6**
Divorced	4	**5**
Widowed	2	**4**
Separated	2	**1**
Number of Adults in the home:		
1	28	**24**
2	51	**49**
3	13	**19**
4 +	7	**8**
Number of 13-17s in the home:		
0	81	**75**
1	12	**13**
2 +	7	**11**
Children under 13:		
0	78	**82**
1	13	**9**
2	7	**7**
3 +	2	**1**

Finally, Table 7 describes the ways in which the survey respondents occupy their homes: by far the largest proportion are in rented accommodation, and this is typical of the borough. A further 20% are in Housing Association properties, four times the borough average, and 17% (just over half the expected proportion) in outright ownership or mortgaged property

Table 7: Household Occupancy

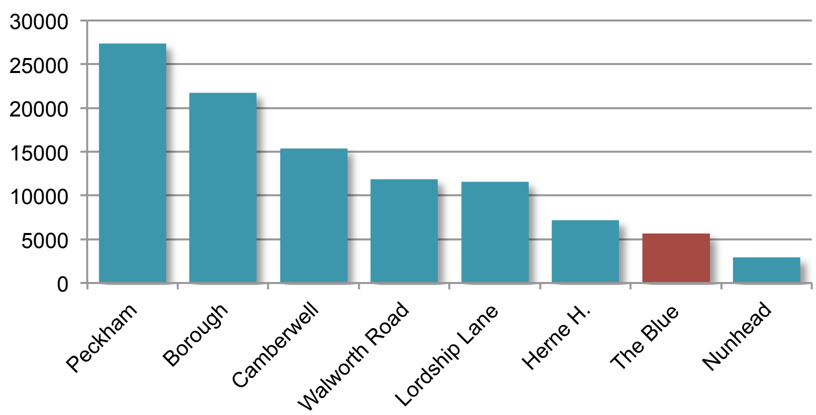
(n = 98)	Average %	Southwark Park Rd %
Rent	52	53
Own it outright or with a mortgage	31	17
Shared ownership or Housing Association	6	20
Live there rent free	5	2
Other/ No response	7	7

Housing Association occupancy is high

4. Findings: Footfall Distributions

Southwark Park Road is among the quieter high streets observed. Over the course of two days over 5,600 pedestrians were counted passing on either side of the street. This amounts to an average footfall density of 400 people per hour, comparable with the flow Nunhead or at Herne Hill. Figure 1 compares the footfall at Southwark Park Road with the eight high streets in the study. Peckham Rye and Borough have higher densities, but are both different in character.

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



4.1 Weekend & Weekday Ratio

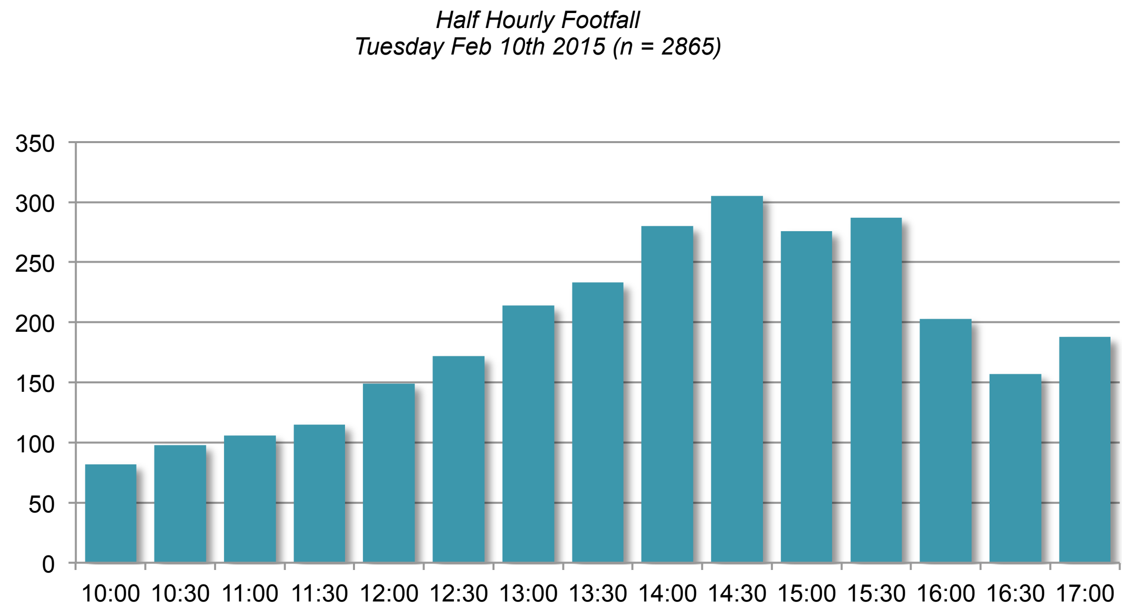
Table 10 highlights the density ratio between Saturday and Tuesday. On Southwark Park Road, unlike some other centres in Southwark, it appears that the ratio remains relatively constant between the two days.

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
Southwark Park Road	**2677**	**2945**	**5622**	**400**
Nunhead Lane	1282	1648	2930	200
	45397	**58377**	**103774**	

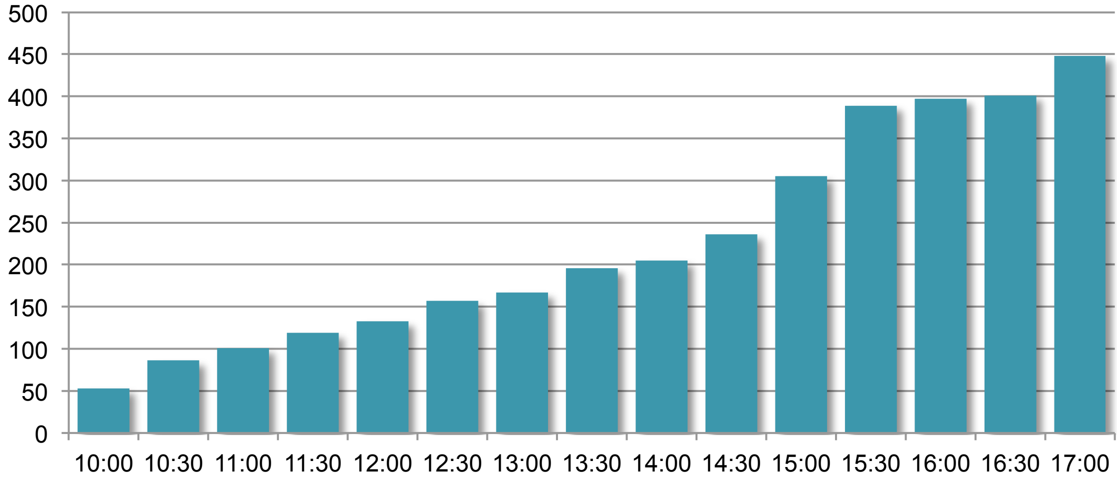
4.2 Footfall Count: Tuesday



Tuesday footfall on Southwark Park Road built until 2.30 and then declined for the remainder of the observation period. The peak density lasted from around 2 until 3.30.

4.3 Footfall Count: Saturday

Half Hourly Footfall
Saturday Feb 14th 2015 (n = 3393)



On Saturday the traffic flow appears to build across the day, a pattern seen elsewhere in the borough, with the peak flow at around 3.00 until 5.00. This achieves twice the morning density.

The pattern suggests a *"make hay while the sun shines"* strategy, suggesting that retailers be well prepared to meet the needs of the available traffic in a concentrated period towards the end of Saturday.

5. High Street Catchment Area, Travel Time & Method

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

Table 9 is ordered by size, and shows that over half of the respondents (57%) lived in the local postcode, SE16. The second highest areas, SE1 and SE15 are adjacent but together drew just 10% of the sample. The remainder lived in twenty further postcodes, spread largely but not exclusively from around South and East London.

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% across all high streets. Rather fewer were willing to supply a full code; it is not possible to drill further into the catchment area with any confidence.

Table 9: Catchment Area

	Southwark Park Road
	%
SE16	57
SE1	5
SE15	5
E13	4
SE21	4
E7	2
HA9	2
NW10	2
BR1	1
DA4	1
E1	1
E6	1
N4	1
NW1	1
SE17	1
SE23	1
SE6	1
SW10	1
SW16	1
SW17	1
SW8	1
SW9	1
W6	1

A concentration of the local population

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 84% of the visitors interviewed considered themselves to be local to Southwark Park Road by virtue of where they lived or worked. The proportion claiming to live locally is the average for the total survey, and travel time for most (80%) was under 30 minutes. Only one respondent had travelled for over an hour on that day to be there.

Table 10: How Local?
Where have you travelled from? How long did it take you?

	Average %	Southwark Park Road %
Living Locally	52	52
Working Locally	14	18
Both	17	14
Those who travelled...		
Less than 30 minutes	74	80
Between half & one hour	22	19
1 to 2 hours	3	1
Over 2 hours	1	0

Visitors to Southwark Park Road are local.

5.2 How did they get here?

Table 11 helps to confirm the picture of the typical visitor: almost three quarters had come to the high street on foot or by bus, the majority by walking.

More than the survey average had travelled by train or underground and half the expected proportion had come by car. The picture is of a local population using the centre because it is convenient and easy to access.

Table 11: Transport
What was your main form of travel to get here today?

	Average %	Southwark Park Road %
Walk	48	**54**
Bus	22	**19**
Train	6	**9**
Tube	5	**7**
Car	11	**6**
Taxi	1	**3**
Cycle	6	**1**
Other	0	**0**

- almost three quarters arrive *on foot or by bus*

6. Consumer Behaviour

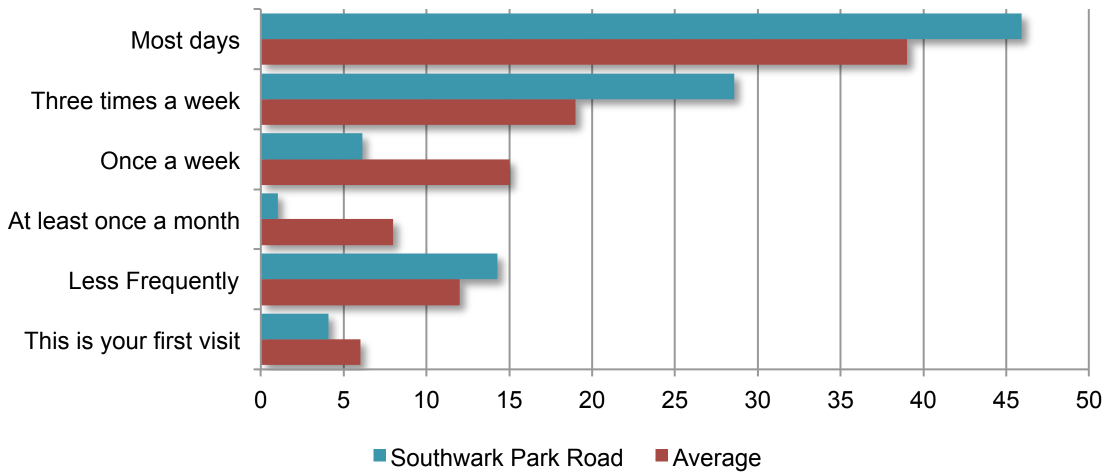
6.1 Frequency and Dwell Time

The survey established the frequency with which visitors came to Southwark Park Road and how long they stayed. These values were compared with the total responses to identify some characteristic features of visitor behaviour in Bermondsey.

Figure 4 reveals that frequency of visit is above average, with almost half coming to the high street every day. In addition, over a quarter of the respondents stop here three times a week. 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?"



Almost half visit ***every day***

Respondents were asked how long they intended to stay on the high street, and Table 12 indicates that visits to Southwark Park Road are very likely to be short. 53% of respondents intended to be there for half an hour or less and this is shorter in comparison with other High Streets in the survey but not unusual. Slightly more respondents than average (33% vs. 21%) intended to stay on the high street for up to an hour.

Accounting for 86% of the sample, these values highlight the contrast with dwell times recorded at Westfield White City, where visitors spend two hours thirty-five minutes on an average trip[1]. The disparity highlights the difference between convenience and destination shopping.

Visit ***frequency*** rather than dwell time thus appears to be a useful distinctive feature of shopping on Southwark Park Road

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[1] 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	Southwark Park Road
Up to 15 minutes	22	31
15 – 30 minutes	26	22
30 minutes – 1 hour	21	33
1 – 2 hours	17	7
2 – 3 hours	4	3
3 – 4 hours	2	0
More than 4 hours	8	4

A destination for some? More than expected stay up to an hour

6.2 Intended Purpose of visit

Respondents were asked what "the main purpose of their visit was today". 47% said they were shopping, 20% passing through, 21% eating, drinking or meeting friends, and 1% intended to visit a bank, building society or other professional service.

Since most high street visits are unlikely to be for a single purpose we also 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.

Nearly three quarters said they would be shopping, slightly below average. Nearly half intended to visit a restaurant, café, pub or takeaway, or to meet friends. These scores are somewhat below survey average and may represent an opportunity for local businesses. A fifth intended to use a financial or other service, above average, as a secondary reason for being there, and over half said they were just passing through. This represents a useful target market as it appears that they can be induced to spend.

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 %	Southwark Park Road %
Shopping	45	47
	30	23
	75	***70***
Travelling through	23	*20*
	23	34
	46	***55***
Eating, Drinking, Leisure	18	21
	35	22
	53	***44***
Fitnesss, Health, Finance	6	*1*
	8	17
	14	***18***
Other	8	10
	4	3
	12	***14***

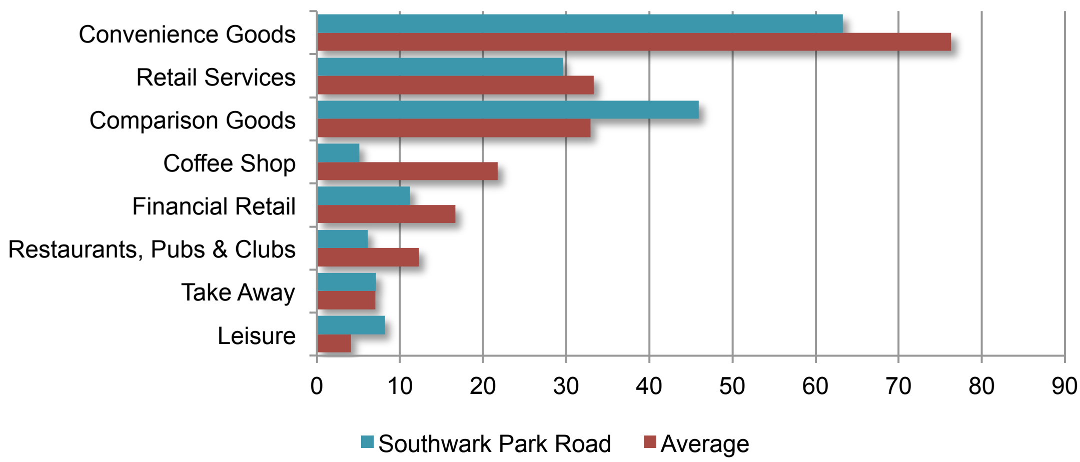
Nearly **three quarters are shopping today.**

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.

The figure shows that fewer respondents than average had visited a convenience store, or some retail service (dry cleaner, hair dresser etc), but rather more than expected had visited a comparison goods store such as homeware, furniture or DIY. These responses are above average, while the remainder (with the exception of leisure – mainly bookmakers) score rather lower against the Southwark benchmarks. Fewer than expected had visited a coffee shop or take away for example.

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



6.4 Claimed Average Spend

The nature of the shopping on Southwark Park Road is best defined as little and often. Table 14 indicates that the average intended or claimed spend is very low, with 85% expecting to part with less than £20.00, and over half intending to spend ten pounds or less. This is the lowest in the borough.

Table 14: Claimed Average Spend

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

	Average	Southwark Park Road
	%	%
Less than £10	32	56
£10 - £20	29	29
£20 - £30	16	9
£30 - £40	10	1
£40 - £50	7	1
£50 - £70	4	3
More than £70	3	0

Average spend is very low

The average spend across all eight high streets shows that a third of all Southwark shopppers intended to spend less than £10 per visit to any high street, but on this basis Southwark Park Road businesses need to serve many customers to compete in turnover terms.

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. Southwark Park Road has a higher than average proportion of comparison goods stores, and a market but shoppers remain highly local – the area does not draw many from outside. In addition, the choice on offer does not retain local shoppers to this class of retail. 50% of the respondents travel to four destinations for more variety, largely to the nearby Surrey Quays (18%) or to the West End (17%).

Table 15: Duplication of High Streets

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

(n = 98)	Southwark Park Road	%
Surrey Quays	18	18
West End	17	17
Westfield Stratford	8	8
Lewisham	7	7
Peckham	4	4
Brixton	3	3
Westfield West	3	3
Old Kent Road	3	3
Online	3	3
Battersea	2	2
		69
23 alternatives		

Table 15 indicates the biggest high streets with which Southwark Park Road is competing for footfall. The top four locations named attract 50% of the respondents, and after those locations the number of respondents identifying any particular centre declines rapidly. Most named locations are fairly local and easily accessible.

The total list of competing alternatives is long, reaching 23, yet almost half the switching is accounted for in just four choices. This is a familiar pattern in retail gravitation models where the busiest locations with the easiest access are the biggest competitors. Many Bermondsey shoppers can also be found in Surrey Quays and this is hardly surprising, but it doesn't necessarily mean that Southwark Park Road should try to compete on that basis. Its shoppers on are there because it is convenient and fits into their routine, and this in itself creates a sizable opportunity for local retailers.

6.6 Consumer Behaviour: summary

Southwark Park Road is the second quietest high street in this survey. Visitors are very likely to live and/or work locally and to arrive from lunchtime onwards. The centre is a convenient walk or short bus ride away, and so they visit very frequently, for comparison goods, snacks and coffees, for banking, or for top up shopping. Most intend to spend some money on the trip, even if they are just passing through and probably somewhere between £10 and £20, slightly below the survey average. Such "little & often" shopping becomes habitual and it creates opportunities for independent retailers which we identify in the conclusion.

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 Southwark Park Road.

In Table 16 the attributes that most attract visitors are identified. The table is ordered by the average Southwark results, and it can be seen that Bermondsey scores very strongly indeed on convenience, which is obviously a key motivating factor. After that the most popular features all score lower than the average particularly on the available choice of outlets while the environment scores rather better. The existence of a particular service is a draw for 3% of visitors, which is about normal.

Table 16: What's good….?
What most attracts you to this town centre?

	Average	Southwark Pk Rd
	%	%
Proximity or Convenience	**47**	60
Range of shops	**21**	7
Range of places to eat or drink	**10**	3
Attractive environment	**7**	10
A specific retailer or service	**4**	3
Ease of Parking	**2**	1
Other	**10**	15

This might indicate a way for individual retailers to compete for available footfall since visitors appear to be expressing a *"because it's there…"* view of the facilities. On this basis any retailer or café that stands out through exceptional quality or service might then well draw more trade.

When asked specifically what they thought might be improved or what they felt was missing, the biggest gripe by far (43%), as reported in Table 19, was the lack of choice in stores. The next largest (but just 11%) were comments about the lack of dining options.

The list of missing attributes was developed from open-ended questions across the full survey so it can be seen that Southwark Park Road does not suffer from the full range by any means. Very few complained about parking but rather more missed a sense of community (4%) and the provision of leisure amenities (5%).

Table 17: What's bad…..?
What if anything do you think is missing from this town centre?

	Southwark Park Road	
Respondents	*98*	
A Wider Range of Stores	42	43%
Cafes	11	11%
Leisure Activities	5	5%
Social & Community	4	4%
Parks & Green Space	2	2%
Transportation & Public Realm	1	1%
Bars & Pubs	1	1%
Parking	1	1%
Gyms	1	1%
Bank/ATM	0	0%
Variety of Restaurants	0	0%
Cinema	0	0%
Police Station	0	0%

A greater variety of shops is wanted

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.

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 Southwark Park Road 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 42% of respondents claim to use one or other of the local papers for information. Although online is effective at 20% its reach by channel 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.

Word of Mouth was named by fewer than expected respondents as an information source: it is possible that WoM or *e*-WoM are hardly considered as sources of information in a context in which Southwark Park Road is shopped "because it's there", but for which there are low expectations.

For a business that stands out and becomes distinctive by surprising or delighting regular shoppers with some exceptional attribute, word of mouth could then be easily generated.

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

	Average %	Southwark Park Road %
Other Online	15	20
TV	32	18
South London Press	7	18
Radio	8	12
Other (Traditional)	8	9
Southwark News	7	9
Word of Mouth	15	4
Southwark Business Today	0	3
S.E.1 Magazine	2	2
Southwark Life Magazine	1	1
Southwark & Bermondsey News	2	0

Strong local press

8.2 Advertising Recall

Unprompted recall of advertising for local events was then tested. Scores were quite low: about 19% could recall such advertising, and were then prompted to describe it. Table 19 lists the various responses, which are also then individually low. The named events and their advertising may have been separated in time by a few months and memories decay, but the list may also well demonstrate a low awareness of and engagement with local marketing activities.

Table 19: Local Advertising Recall

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

(n = 98)	Southwark Park Road %
Yes	19
When Prompted:	
Helipad	1
KFC	1
Funfair	1
Sunday Market	1
Vogue	1

But recall is low

8.3 Community Engagement

When asked to recall any community or local events they had attended in the past year, the response was also low: just 8%.

Interestingly, the question generated a different list of local events from respondents. Several visitors were able to recall the fireworks and the carnival. Once again however the list indicates low engagement with both community and commercial activities, and possibly the low adoption of local events by the population.

Table 20: Community Engagement

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

(n = 98)	Southwark Park Road %
Firework displays	2
Southwark Carnival	2
Boot sales in Southwark	1
Dancing event	1
Peckham food festival	1
Royal wedding	1
Total	8
(Non-response = 92%)	

… and so is community engagement

8.4 Promotional Reach

Finally and most surprisingly Table 21 indicates an extremely low engagement with promotional marketing tools either online or traditional. The table is ordered by the average scores for the borough, already low at 32%. Bermondsey shoppers are even less likely than average to take advantage of these mechanics: only 3% used a coupon, just half the Southwark average.

Table 21: Promotional Reach
Have you used any of the following today?

	Average %	Southwark Park Road %
Coupons	7	3
Social media promotion	7	1
Email Promotion	6	1
Store Locator	4	2
Service Locator apps	4	0
Voucher apps	3	0
QR Codes	2	1
Total	32	8

A low promotional effectiveness

9. Conclusion

The data collected in Bermondsey lead us to conclude the following:

- **Footfall density is low but it constitutes a willing target market.** On average *400 people per hour* pass up or down Southwark Park Road on foot, low by Southwark high street averages. Peak flows occurred after lunch on Saturday and Tuesday. Almost all intended to spend money on Southwark Park Road, even those just "passing through" – just under three quarters were shopping and about half looking for food or drink.

- **Local customers, shopping little & often.** The biggest advantage for businesses on Southwark Park Road is the convenience of the location for a large catchment of local shoppers. However, while frequency of visit is high, average spend is below average, and most visitors are rather unenthusiastic about what is on offer. They are on the high street for a limited time simply because it is nearby and easy.

- **Relationship building.** The nature of the customer base creates an opportunity for independent businesses to stand out by building personal relationships with 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. Independent store-owners are in a powerful competitive position here despite competition from national brands, and can research their customer base quickly and react to its needs easily.

- **Be distinctive.** The idea is to become a stand-out, distinctive in meeting the need for convenience in every way – store layout, service provision, and offer. While most are visiting convenience stores, Southwark Park Road is rich in the variety of other types of retail available. By drawing attention to this it becomes possible to generate word of mouth against a background of low expectations. Delivering consistently above those expectations must bring rewards.

- **Be local.** The customer base is predominantly local so there is a competitive opportunity for independent retailers to be in and of the community. Supporting local business networks to drive quality and service and instigate local activities creates talking points to engage with local shoppers and encourages further word of mouth. At present the shoppers seem rather disengaged and a little less than thrilled with what is available. As a business group judicious organisation and promotion of local events, especially using the market space may encourage greater footfall.